INSTALLATION AND USE GUIDE

W-Systems

wMobile

Wireless Access to GoldMine

www.w-systems.com

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Part VI Desktop Edition 662

1   Introduction

1.1   Introducing wMobile

Introduction

wMobile™ is an application that is installed on one of your organization's servers to provide remote access to GoldMine™. wMobile provides this functionality through any mobile phone device with an internet connection and an internet browser application. Examples of such devices are any iPhone®, iPad®, Android phone or tablet, or Windows Mobile® devices.

wMobile uses the internet browser application of the device to navigate to your organization's wMobile server so that you can work with your organization's GoldMine CRM information.

To get started with wMobile you will need to add a web site link to your device's internet browser. Your organization will have a unique web address (URL) for your wMobile server. A typical address would be http://www.organization.com/wmobile or https://wmobile.organization.com. Please contact your wMobile administrator to obtain the web address you will need to use.

Overview of Features

Contact Management
wMobile provides your users with secure access to all contact information stored in GoldMine. It is quick and easy to find, edit and add contacts and related information.

Phone and Email Integration

wMobile interacts with your device allowing you to quickly phone and email contacts using the capabilities of the device. A complete email center allows all email to be linked to GoldMine CRM.

Sales Forecast Management
wMobile allows you to easily review, update and add sales forecasts for any contact and for any time period.

Activity Management
wMobile allows you to quickly review, update, add and complete activities with immediate update of your GoldMine database. You can schedule and review activities for other GoldMine team members.

Dashboard Reporting
Quickly review key statistics from the GoldMine system. A dashboard displays information such as the number of completed and pending activities. For history, new contacts added to the database are shown. You can quickly jump to underlying detail information.

Easy Configuration
wMobile automatically inherits configuration from your GoldMine system. A designer application is included to allow additional changes to the wMobile user interface.

Security
wMobile supports all GoldMine security concepts as well as standard internet security protocols such as SSL data encryption, Firewall DMZ installation and BlackBerry Enterprise server integration. Data resides on the server and never on the device itself.

Real Time Data
Information updated on a wMobile device is immediately applied to your GoldMine system without the need for data replication.

Cross Platform Support
wMobile supports all phone devices such as BlackBerry® , Palm Treo®, Windows Mobile® and iPhone®. wMobile supports all worldwide mobile phone carriers and systems with internet data service.

Ease of Administration
The wMobile server is installed in less than an hour and users are deployed in minutes.

1.2   Document Conventions

wMobile provides this functionality through mobile phone devices with an internet connection and an internet browser application. Therefore, the term "**page**" will be used throughout this document to refer to the current page (i.e., web page, screen, form, etc.) being displayed on your device.

The word "**click**" is used at times throughout this document as a metaphor to describe an action that you, the wMobile user, will perform on a button, a link (also referred to as: hyperlink), a drop-down list or any other object on a screen that requires user intervention. The actual "*action*" that you need to perform for a "**click**" will depend on the device you are using to access wMobile. For example, these actions may include the "**click**" of the trackwheel on a BlackBerry device, the "**tap**" of a finger or stylus on a smartphone, a "**mouse click**" if you are using a desktop computer or even a "**tap**" on a laptop's touchpad, etc.

The term "**link**" is used interchangeably with hyperlink. A link is typically displayed on a web page as blue underlined text (e.g., [Home](#)).

The documentation you are reading also uses these following conventions:

CONVENTION	DESCRIPTION
boldface	Menus and menu options, command buttons, tabs, and service or process names.
italics	References to other documentation.
`monospace`	Web site addresses, email addresses, file names, folder names, user input / user entered information, command lines and other information to be entered by users using keys pressed on the keyboard.
KEY PRESS	Keyboard Key Press Combinations - Keys that you are to press will be in **boldface**. Keyboard key press combinations and singular key presses will be shown differently depending on how the user is required to perform the key press.

	For key press combinations joined with a plus sign (e.g., **Alt+F**) the user would press and hold the first key while simultaneously pressing the second key. Single key presses are simply shown as the key to be pressed (e.g., **Enter**, **Shift**, **F1**, **Esc**, **Page Up**, **Tab**, etc.). For combinations joined with a comma (e.g., **<Alt, F>**) the user would press and release the first key, then press and release the second key.
>	This symbol indicates a menu item. For example, "Select **Tools > Options**" means choose the **Options** item from the **Tools** menu.
KEYWORD	Keywords for SQL and other programming languages will appear in boldface and uppercase text.
🗒	General notes
⚠	Important information
💡	Tips, ideas and recommendations
🔧	Configuration notes

1.3 Searching the Users' Guide

Getting answers to questions fast is a key to productivity. This online wMobile Users' Guide supports full-text search.

To start searching, use the **SEARCH** tab.

How to search for an exact phrase in the wMobile Users' Guide

Enclosing one or more words inside of double-quotes will allow you to search for an exact phrase. For example, entering work will find work, working and framework, but entering "work" with double-quotes will only find work. This also works for a group of words. Entering "Working with the Calendar" will only find the exact occurrences of all four words. This functionality (using double-quotes) can be combined with wildcard characters. For example, "work*" will find working but not framework.

💡 **TIP: Using the * and ? Wildcard Characters in Full Text Searches**

There are two wildcard characters you can use when searching: the asterisk (*) and the question mark (?) which are almost the same in use.

? is used to represent any single character and * represents any number of characters.

Examples:
Search using (?): "**s?t**"
Results: **sat**, **sit**, **set**, ...etc.
"s?t" will find any combination of three characters beginning with "s" and ending with "t".

Search using (*): "**s*t**"
Results: **sail boat**, **soft**, **signed document**, ...etc.
"s*t" will find any combination of characters beginning with "s" and ending with "t".

1.4   Documentation Feedback

wMobile Support always seeks to improve its documentation. Please send your questions, comments, or suggestions about this or any wMobile Support documentation to goldminesupport@sugarcrm.com.

Your feedback is always welcome and appreciated. Thank you!

1.5   Version History

What's New in these versions...

- wMobile 5.1
- wMobile 5.0
- wMobile 4.0
- wMobile 3.1
- wMobile 3.0
- wMobile 2.1
- wMobile 2.0
- wMobile 1.9
- wMobile 1.8

1.5.1   What's New in wMobile 5.1?

NEW

wMobile (Infrastructure Changes)
- Windows Server 2008/R2 end of support
- Internet Explorer 11 end of support

wMobile Phone
- The Phone version includes a clean and modern UI:
1. Layout
o wMobile Phone has a new look. All the pages and controls in the application have a modern and cleaner style.
o The new UI also has new features to customize the display.
o 'Font Size' and 'Display Density' settings can be used to adapt the display to your screen size.

2. Menu

o A new user menu (side menu) was added where you can view your preferences, save bookmarks and navigate to the recently viewed contacts.
o The style of this menu as well as the style of the 'Home Menu' can be customized in User Preferences.

3. Contact View

o The Contact view is separated into 2 tabs to show Details, such as a user typically sees on the top of the wMobile Desktop or Goldmine contact view and Linked information, such as we see on the Contact tabs.
o The same style is used in Opportunity, Case and Project views.

4. Calendar

o Month: You can view activities on a specific day directly in this view and you can navigate very easily to a specific day.
o Today button was added in the calendar top bar.
o A new setting was added: 'default activity duration' - used to preset the duration when creating a new activity.

5. Email

o The Email Center will offer Email navigation and Email view improvements as well as menu reorganization.

NOTE: The wMobile Phone documentation has been updated for our new wMobile 5.1 User Interface.

wMobile (General)
• The email messages can be seen in Calendar (Calendar Preferences -> History Activities list)

wMobile Desktop
• Metric Dashboards for Projects
• New darker theme
• Added support for larger email attachments

wMobile Manager Console
• Error 'wMobile.Managerconsoel.exe has stopped working' error on closing the wMobile Manager Console has been resolved.

wMobile Email Fetcher Service

- Fix for Local Trash Deletion Service

1.5.2   What's New in wMobile 5.0?

NEW

wMobile (Infrastructure Changes)
- .NET Framework 4.7.2 (or higher) will now be a prerequisite
- wMobile 5.0 includes a Telerik upgrade. Telerik is the tool our developers use to build wMobile. The new provides new programming functionality, including the basis for the new Desktop User Interface.
- Windows Server 2019 is added as a supported environment for wMobile
- SAP Crystal Reports Runtime Engine update

wMobile Desktop
- New User Interface with bigger buttons and easy to read menus
- Customizable navigation menu
- Recent navigation menu to return to previously visited pages
- New Themes to work with the new user interface
- Metric Dashboards for Activities, Opportunities, and Cases (a metric dashboards for Projects is coming!)

1.5.3   What's New in wMobile 4.1?

Infrastructure Changes
- The wMobile 4.1 upgrade will update all references back to the wMobile corporate domain, including installers, license activation, and the wDiagnostic.
- New icons for wMobile Phone and Desktop one-click logins.
- New icons on the server for the wMobile Manager Console, wDiagnostic, and wMobile Update shortcuts.
- Local Email Rules functionality has been added for processing incoming emails in wMobile Desktop and wMobile Phone. This functionality can emulate GoldMine's auto-retrieve and auto-delete settings for online email (on your email server or ISP).
- Support added for WebEx meeting requests in wMobile's email client.

NEW

wMobile (General)
- Improvements to installers so they are not detected by anti-virus applications.
- Option added to bypass GoldMine 2018.2 password complexity rules if these rules were not adopted in existing GoldMine implementations.

- Support for email rules, such as copying email from the Online Inbox to the GoldMine Inbox
- Delete functionality added on Opportunities
- User Access filter will be taken into account when checking for duplicate contacts.
- Support for WebEx Meeting requests in wMobile's email client

wMobile Phone
- Option added to show primary email and website on Pending Activity List
- Ability to 'Hide' wMobile Phone fields instead of removing them in the Manager console Contact Screen Configuration
- More options added to filter builder operators for improved searching

wMobile Desktop
- Fixes in filter bar use
- Improvements to Opportunity fields set to not allow blank input and force valid input

1.5.4   What's New in wMobile 4.0?
Infrastructure Changes
- wMobile 4.0 included updated branding to reflect our UpCurve Cloud company name. All references such as installers, license activation, and diagnostics have been re-pointed to our new domain. The wMobile product name remains the same. The same staff are here to develop and support wMobile!

NEW

wMobile (General)
- Support for most security features in GoldMine 2018.2 ([password complexity](#) and [SQL Read-Only user](#) configuration)
- Ability to add custom company logos for One Click logins for wMobile Phone and Desktop

wMobile Phone
- Calendar display and navigation enhancements
- Referrals
- Relationships
- Projects

wMobile Desktop
- Calendar display enhancements

- Email Drag and Drop functionality in the Email Center
- Referrals

FIXED

- Opportunity issues in wMobile Phone and Desktop related to filtering options and sorting

1.5.5   What's New in wMobile 3.1?
Infrastructure Changes
- wMobile 3.1 has been updated to support the latest Microsoft standards and platforms.
- wMobile now supports the latest .NET 4.5 framework to provide compatibility with Internet Explorer 11.
- wMobile continues to support BlackBerry, iPhone, Android, and Windows Phone devices

NEW

wMobile Phone
- Record Alerts

wMobile Desktop
- Knowledge Base
- wMobile now has support for iPad and Android tablets
- Record Alerts
- Document merge functionality
- Added Agenda View and Multi-Day View support
- Added support for PDF export for Activities, Contacts, Documents

ENHANCED

wMobile Phone
- Save Draft support in wMobilePhone on composing email
- Navigation enhancements for Phone Edition

wMobile Desktop
- Print calendar support in wMobile Desktop
- iCal export support in wMobile Desktop
- Added Agenda View and Multi-Day View support in wMobile Desktop

- Support to save all email attachments at once in wMobile Desktop
- Added new touch skin in Desktop Edition for tablet operating systems: MetroTouch
- Added ability to change activity type to Email on completion

wMobile (General)
- Moved wMobile updates and Mgr Console out of Phone Edition folder on Start menu
- Add support for dbase COLOR and COUNTER functions

FIXED

- On tablets, add support to manage the zoom level
- Show the grids hyperlink columns with a different style in wMobileDesktop
- Notes editor does not display a border in some screens
- Change lookup stylus such that it will be easier to touch it on tablets
- On Tablets: Wider toolbars are not scrollable or they are hard to scroll
- Desktop: The Clone functionality should not automatically create a contact, but it should open the AddContact screen
- MultiCalendar - left click should open the context menu
- Contact Screen: When we enter the first email address it should be set as primary
- Change Documents Module/AddIn to Document Templates or Templates
- Telerik Update
- In wMobilePhone, added a button to navigate to the bottom of the page, to quickly access the menu

[This is only a partial listing of highlights.]

1.5.6   What's New in wMobile 3.0?
Infrastructure Changes
- wMobile 3.0 has been updated to support the latest Microsoft standards and platforms.
- wMobile now supports the latest .NET 4.0 framework.
- wMobile installers have been updated to be more intelligent about the Web server environment the application is going into.
- wMobile continues to support all BlackBerry, iPhone, Android, Windows Mobile and Palm devices.
- Windows 8 Phone support.

NEW

wMobile Phone

Service Cases

- Support for service cases to mimic GoldMine functionality.

wMobile Desktop
Service Cases

- Support for service cases to mimic GoldMine functionality.

Field Tabs Security Support

Record Type Support

wMobile (General)
Calendar

- Support for using color codes in graphical calendar.

ENHANCED

wMobile Phone
- Ability to customize most of the wMobile Phone screens : change labels or show/hide fields
- Quick Search fields are configurable per user.
- Opportunity Screens improvements: added real time calculation for amount, added product list in opportunity list, etc.
- Email Improvements: changed email account page.

wMobile Desktop
- All screens use new Lookup control with suggestion as you type.
- Support for Clone Contact .
- Opportunities improvements: opportunity list filter and record ownership adjustments.
- Email Improvements: better theme integration with Email Center. Reviewed the email list and adjusted the columns.

Manager Console
- Support for settings editing in Manager Console (System and Default User Options, Ability to view, edit and read system settings documentation).
- Change wMobile/GoldMine database used by wMobile.

Installer
- Signed wMobile Installers

FIXED

wMobile Phone
BlackBerry OS 5 Lookup Contact Issues

- The lookup contact screen buttons and generally any link button were not working on BB OS 5.

Contact List View: Issues with Clicking Email Address

- If the 'Email Client' setting was set to 'Device', then wMobile would have taken you to your device email client - but instead it was redirecting to its internal email client.

Zoom Level: not working on iPads and iPhones

wMobile Desktop
Alarm Screen

- An invalid time in 'ONTIME' column caused a crash in wMobile.

Manager Console
Fetcher Activity Timer Issues

- Email Fetcher Activity screen used to increase CPU and memory usage while running; especially on slower computers.

Common Fixes
Detail Type Fixes

- There was a problem with the dollar character ($) in Detail Type key.

Email Filing with Body Larger than 8000 characters

- If RFC822 was larger than 8000 characters, there was a problem inserting the data into the MAILBOX table.

1.5.7   What's New in wMobile 2.1?

- A brand new desktop browser user interface for those of you who want a full web based version of GoldMine for you Internet Explorer, Firefox, Chrome or Apple Safari browsers. NOTE: This user interface is built on GoldMine Premium and requires customers to have GoldMine Premium (any version) as their current GoldMine system.
- Automated Email Filing to Contacts so you can use any email client to send and receive mail.
- Enhancements to wMobile interface

o Support for multiple contact sets

o Filter based security

o iPhone and iPad enhancements

- Improved installer and New Diagnostic Tool

wMobile Desktop Browser User Interface

- Users see the same contact record as they see in the full GoldMine application.

- All custom fields are automatically displayed in the browser user interface.

- Contact detail tabs behave as in the full GoldMine application.

- All field drop-down options are supported.

- Scheduling and completing activities is done in the same screen layout as the full GoldMine application.

- Daily, weekly, and Monthly calendars are available.

- Users can drag and drop to reschedule activities.

- Users can view others' calendars and schedule according to security permissions.

New: Email Archiving

- wMobile will optionally cache and automatically file any user's sent and received email directly to contact History.

- Supports Microsoft Exchange, Google and any IMAP compliant mail server.

- Users can use any mail client including native mobile phone email client and web mail such as Outlook web access and Gmail.

- wMobile matches "sent from" or "sent to" email addresses to GoldMine contact records.

1.5.8   What's New in wMobile 2.0?

Infrastructure Changes

- wMobile 2.0 has been updated to support the latest Microsoft standards and platforms.

- wMobile is now fully 64 bit compliant and supports the latest .NET 3.5 framework and Windows 2008 64 bit servers.

- wMobile installers have been updated to be more intelligent about the Web server environment the application is going into.

- wMobile continues to support all BlackBerry, iPhone, Android, Windows Mobile and Palm devices.

Customizable Contact Screen

The wMobile system can be further customized to include any user defined or standard CRM field in the main wMobile contact record view and contact related page header. This makes key information visible at a glance.

Customizable Quick Search
Instantly search for any combination GoldMine fields such as Company, contact names, customer numbers and more.

Opportunity Management
wMobile support full opportunity management with complete view and edit ability of all Opportunity information elements including influencers, linked documents, issues, multiple item forecasts, pending and history activities.

Support for alarmed activities
When a user has alarmed activities an alarm flag is shown within the wMobile user interface directing the user to the alarmed activities.

SSL Mail and Gmail Support
wMobile now supports encrypted email SSL protocols for more secure email management and support for Gmail accounts. Gmail in increasingly popular as a business email host performing email services for GoldMine and Outlook clients. wMobile now fully supports this platform.

Email Attachments
wMobile users can now email any document that has been linked to a CRM contact. If a contact wants an emailed quotation or copy of a contract, this is now possible from your mobile device.

Dashboards
- Review Activities
- Review Sales
- Review New Contacts Created
- Drill down to view details

Clone current contact to new record
When entering a new contact record a previously viewed contact record can be cloned to save time and keystrokes.

Duplicate check on new contact entry
wMobile performs a duplicate contact check on new contact entry. Duplicates are shown and users can chose to proceed with entry or to start using the pre-existing contact record.

File email to other contact without re-linking email address
wMobile users can now file an email to a related contact without re linking the email address to the new contact.

Improved One Click Login Setup
It is now simpler to create one click login URL's for new users.

HTML Email Support
- For devices that can display rich HTML, wMobile emails can optionally be shown as HTML instead of the standard text based messages.

Email templates and email merge
- wMobile email client supports email templates and email merge to groups and filters.

Ability to Add Contacts to local device
Contact is copied locally with one click.
Function can be disabled to prevent local data.

Integration to Yahoo Maps for Pocket Devices
Use the Local Are Map function to display the contact location.

Contact Routing
Turn by turn directions to contact from and back to the office or from any of last viewed contacts

Review of GoldMine Groups
Maintain Key Account groups, New Lead Groups for fast account management

Manage forecast sales right from the main menu
- Review and edit existing forecasts
- Add new forecasts
- Review forecasts for other team members (as defined by security settings)

1.5.9   What's New in wMobile 1.9?
Details
Full GoldMine Detail Support has been added to wMobile.
- View, Edit, Add or Delete Details to records.
- View, Edit, Add or Delete Detail types (MASTER users only)

Linked Documents
wMobile now includes a list of all the files on the 'Links' tab in GoldMine. Download and open files* linked to records.

Scheduling Activities for Multiple GoldMine Users
wMobile adds a new 'Users' tab to the 'Schedule Activity screen.

- When Scheduling an Activity, click the 'Users' tab to select multiple users.

Support for Duplicate Record Search when Creating Contacts

Sending E-mail to GoldMine Users without an E-mail Address
By popular demand, wMobile will now send 'Internal' GoldMine messages to GoldMine users without an e-mail address.

- When creating a new message, all the GoldMine user's will appear in the list of recipients. Select a GoldMine user and click Add.

Forwarding E-mail Attachments
Also by popular demand, wMobile now has the ability to forward e-mail attachments.

- When forwarding a message, a new section below the recipient provides to ability to optionally include the attachments of the forwarded message.

Navigation Enhancements
We've added several navigation and viewing enhancements to the following pages:

Contact Details
- The overall layout has been cleaned up so that viewing and editing Pending, History, etc. is grouped together.
- Additional Contacts, Details, Links and Fields screens have been converted into drop down boxes to make the screen shorter.
- wMobile counts the total number of items in each list and also counts the number of each type in the each list. This makes it easier for wMobile users to filter their selection based on the available items. For example, users can filter the Detail list to display only the selected Detail type.
- When Scheduling an Activity, click the 'Users' tab to select multiple users.
- When navigating to a list of Activities, Details, etc. a new link to the primary contact record at the top of the page has been added in addition to the link that already exists at the bottom of the page.

Pending/History

- The layout of the viewing page as been reformatted for better viewing.
- The contact name on the activity is hyperlinked to allow faster navigation.
- When viewing a list of multiple activities, users will have previous and next buttons that prevent users from having to return to the list and select the next activity.

Administrative Password Lockout
Administrators can now have wMobile automatically lockout a wMobile Login if a configurable number of failed logins.

Many Minor Updates
- Various Device Support Improvements
- Various Speed Improvements
- Installer and Update Enhancements

*In order to download and view linked files or e-mail attachments, the device must opening the file type.

1.5.10 What's New in wMobile 1.8?

Monthly, Weekly and Daily Graphical Calendars for any user
wMobile adds three new main menu options for various calendar formats to the main application menu:
Monthly Calendar View, Weekly Calendar View and the Daily Calendar View
- Daily and weekly graphical calendar for any GoldMine user (default current logged in user)
- New appointments can be scheduled directly on the calendar for any user by clicking a time hyperlink
- Existing activities can be viewed, edited and deleted

Detailed Calendar Display User Preferences
User can adjust detailed preferences on calendar function:
- Colors of activities and labels
- Day start and end
- Time section size (15, 30, 60 minutes)
- Alarm on new activities by default
- Working days
- View scheduled activity types
- View completed activity types

Activity Scheduling from Calendar Views

- Press Schedule New Activity menu option or press hyperlinked time label on daily and weekly calendars
- Search for contact to schedule
- Enter activity details

Event Activity Type Scheduling Support
- New support for single or multi-day Event activity type
- Events display as days with designated color background on monthly calendar and before start of day on weekly and daily calendar

International Regional User Settings
- New support for user preferences for date, time, currency type, currency formatting and distance units
- Date formats support day-month or month-day
- Time formats support AM-PM or 24 hour clock format
- Currency supports USD, EUR, GBP, CAD, AUD, YEN, etc.
- Distance units support Miles or Kilometers

Time Zone Translation Support
- New support for converting scheduled activity time for users local time zones
- Activities are entered into GoldMine as local server time but displayed in wMobile converted to each users specified local time zone

Many Minor Updates
- Carry over notes in scheduled follow-up
- Ability to delete scheduled activities
- Ability to copy additional contacts to local address book
- Add File Email to GoldMine Inbox
- Various Speed Improvements
- Installer and Update Enhancements

2   Installing and Configuring wMobile

This section and its sub-sections discuss: pre-installation requirements, installation, how-to's, and post installation:

1. [How to check that the server(s) you are installing on meet all the prerequisites.](#)
2. [How to install or upgrade wMobile.](#)
3. [How to configure wMobile using the wMobile Manager Console.](#)

2.1   Pre-Installation Checklist (System Requirements)

> ⚠ **IMPORTANT**: Before starting a new wMobile installation or upgrading an existing previous version of wMobile to the latest version, please be sure that your system's environment meets the minimum hardware and software requirements.

By verifying all the items on the list, you are ensuring that your installation of wMobile will be successful. If you are unsure about anything on the list, the 'How do I...' and 'Discussion...' links in the 'See Also' section for each item will help you check, complete or understand any requirement on the list.

📰 **NOTE: Unless specifically stated, restarting the server will NOT BE required when installing any of the prerequisites.**

❑ **Operating System Requirements:**

- Verify that the server(s) on which you are installing wMobile on have the following minimum operating system requirements:
  - ▪ Windows Small Business Server 2011 [64-bit (x64) processor]
  - ▪ Windows Server 2012 (All Editions) [64-bit (x64) processor]
  - ▪ Windows Server 2016 (All Editions) [64-bit (x64) processor]
  - ▪ Windows Server 2019 (All Editions) [64-bit (x64) processor]

- **See Also:**
  - ○ [How do I check if my server meets the Operating System requirements?](#)

❑ **GoldMine Version Requirements:**

- Verify that the GoldMine version meets the minimum requirements:
  o GoldMine Corporate
    ▪ GoldMine Corporate Edition, Version 7.0 or higher.

  o GoldMine Premium
    ▪ GoldMine Premium Edition, Version 8.0 or higher.
    ▪ GoldMine Premium Edition, Version 9.0 or higher.
    ▪ GoldMine 2013.x, 2014.x, 2015.x, 2016.x, 2018.x, 2019.x

- **See Also:**
  o [How do I check my GoldMine version?](#)

❑ **GM.INI Settings:**

- Verify that the 'SysDir' setting in the GM.INI file does not point to a mapped driver letter.

- **See Also:**
  o [How do I check my GM.INI file for a Mapped Drive Letter?](#)
  o [How do I determine if the SYSDIR path in the GM.INI file is a mapped drive letter?](#)
  o [What is a Mapped Driver Letter?](#)
  o [Discussion: GM.INI Settings](#)

❑ **.NET Framework:**

> ⚠ **IMPORTANT: Installing .NET Framework**
>
> If .NET Framework v4.7.2 or higher is not detected, the wMobile 5.0 installer will provide options to download it from the wMobile or Microsoft server.
>
> [.NET Framework 4.7.2 can be installed on the following operating systems](#):
> - Windows Small Business Server 2011 [64-bit (x64) processor]
> - Windows Server 2012 (All Editions) [64-bit (x64) processor]
> - Windows Server 2016 (All Editions) [64-bit (x64) processor]
> - Windows Server 2019 (All Editions) [64-bit (x64) processor]

The .NET Framework install often requires a server reboot. The .NET Framework installations should be performed on the server "prior" to running the wMobile installer.

- o [How to Install .NET Framework](#)

🗐 **NOTE**: When the wMobile installer is started, it will determine if the required .NET Framework version is missing and if so, prompt the user to install it. After the user is prompted the installer will close.

- **See Also:**
  - o [How do I check if I have .NET Framework installed?](#)

❑ **Internet Information Services (IIS):**

- Verify that you have Internet Information Services (IIS) installed on the Web Server. Please check the screenshots for your server version to confirm that you have all the prerequisite roles and features installed.

- **See Also:**
  - o [How do I verify that IIS and required Roles and Features are installed?](#)

❑ **ASP.NET 4.0:**

- Verify that ASP.NET 4.0 is installed on the Web Server.

- **See Also:**
  - o [How do I verify that ASP.NET is installed?](#)

❑ **SQL Server Login Credentials:**

- Verify or create a SQL username and password that is mapped to the GoldMine database and has 'db_owner' role membership.

NOTE: wMobile will create objects in the GoldMine database. The 'db_owner' role is required to create these objects and for wMobile to work properly.

- **See Also:**
  - How do I check for database mapping and role membership?
  - How do I create a SQL user?
  - How do I set Permissions?

❑ **Open Port(s) In The Firewall:**

- Verify that ports have been opened from the firewall to the Web Server.

- **See Also:**
  - Discussion: Opening ports in the firewall for wMobile

2.1.1   Checking Operating System Requirements
Determining an Operating System's Version

- **On Any Version of Windows if "My Computer" is on the desktop**

  1. Right-click on **My Computer** and click **Properties**.
  2. The Windows Edition should be displayed in the first section.

- **On Any Version of Windows if "My Computer" is not on the desktop**
  1. Click on **Start** or use the Windows Logo Key 🪟 on the keyboard.
  2. Right-click on **Computer** in Windows Explorer and click **Properties**.
  3. For **Windows Server 2012** the version of Windows will be displayed under the **Windows edition** (the first section) and **System** sections (the second section) of **System** window. The **System** window will be the first window that is displayed.
  4. For **Windows Server 2016** and **Windows Server 2019**, open the **Start** menu. Right click on **This PC** and select **Properties**.

💡 **TIP**: Alternate Method

To determine the version of:

- Windows Server 2012, 2016, 2019: Use Search, type in **winver**, and then click **winver** where the search results are displayed.

> 📓 **NOTE**: The **<Windows Logo Key 🪟 + R>** keyboard combination will open the **Run** dialog on all versions of Windows.

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2.1.2 How To Check GoldMine Version
- **For Any Edition of GoldMine**

1. Open GoldMine and login.
2. On the main menu, click Help and select About or About GoldMine...
3. The GoldMine edition and version information will be displayed on the About GoldMine window.

[Return to the Pre-Installation Checklist](#)

2.1.3 Checking GoldMine Database
- **In Any Edition of GoldMine**

1. Open GoldMine and login.
2. Click on **Help** and select **About** or **About GoldMine...**
3. Click **System**.
4. Look for **GoldMine Files** and **Contact Files** under the **Description** column.
5. Note the values for **GoldMine Files** and **Contact Files** as this information will be needed during the wMobile installation.

[Return to the Pre-Installation Checklist](#)

2.1.4 How Do I Check My GM.INI
- **In Any Edition of GoldMine**

1. Open **GoldMine** and login.
2. Click on **Help** and select **About** or **About GoldMine...**

---

3. Click **System**.

4. Look for **System Files** under the **Description** column and make a note of the path designated in the value column.

5. In My Computer/Computer, browse to the path of the **System Files**.

6. Once you have navigated to the path, open the file named **GM.INI**.

7. In **GM.INI**, look for a setting called **SysDir**.

8. Make a note of the value following **SysDir=**.

9. If the value begins with "****", then the GM.INI is using a **UNC path** to find the GoldMine system files.
   NOTE: wMobile will be able to find the GoldMine system files using a UNC path. No changes are needed to achieve a successful wMobile installation.

10. If the value begins with a letter, then there is a possibility that the GM.INI is using a mapped drive letter to find the GoldMine System Files. Refer to the topic on determining if a [Drive letter is a mapped drive](#).

   NOTE: In the case of a mapped drive, it must be configured in the wMobile Manage Console [Virtual File System (VFS) Settings](#) after installation to ensure access to GoldMine files (such as the license, executable and dll files) as well as documents.

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2.1.4.1   What is a Mapped Drive Letter

A mapped drive letter is the way of associating a letter assignment with either a shared a shared folder on another computer (its most common usage) or even on the local machine. When a drive is mapped, GoldMine or the user can read and write files by accessing that drive letter, just as if that drive represented a local physical hard disk drive on the workstation or server.

Consider the following:

A server named GMSERVER has a folder called Apps on the C:\ drive. It is shared as Apps. Therefore, to access the folder from the network, a user would type \\GMSERVER\Apps in the address bar of a window. Since the Apps folder is shared, it can be mapped as a drive letter. For this example, we will assume that \\GMSERVER\Apps is mapped to the G:\ drive letter on a user's computer.

Any folder under \\GMSERVER\Apps (Quickbooks, GoldMine, or any other application) is seen from the workstation on the G:\ drive instead of on the Apps folder on \\GMSERVER. However, the locations are the same. So if a user types either \

\GMSERVER\Apps\GoldMine or G:\GoldMine in the address bar of a window, they will be taken to the same location.

The important thing to remember with mapped drive letters is that they are specific to a given user and are often assigned through a login script or manually assigned in Windows.

Service accounts or the Local System account cannot access mapped drive letters. Any service using the Local System account should use the local path (in this example, C:\Apps) in place of the mapped drive letter, if possible. Any service using a Service Account can use either the local path (in this example, C:\Apps) or the UNC path (in this example,\\GMSERVER\Apps) in place of the mapped drive letter. In wMobile 3.0 or above, the Virtual File System (VFS) Settings in the wMobile Manager Console can be used to configure a translation for drive mapped paths that are not normally accessible by the Local System account.

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2.1.4.2   Discussion: GM.INI Settings

- **The Use of GM.INI settings in the Remote GoldMine Service**

The GM.INI is a global settings file that helps GoldMine determine (among many other things) where data is located. When the GoldMine API is loaded, it reads the GM.INI and feeds several important pieces of information to the Remote GoldMine Service (RGMS):

What database alias contains the GoldMine contact set. This is the COMMONDIR setting in the GM.INI.
What database alias contains the common GoldMine database tables. This is the GOLDDIR setting in the GM.INI.
Where the GoldMine System Files (such as the license file and the GoldMine's program files) are located. This is the SYSDIR setting in the GM.INI.

The Remote GoldMine Service takes these values and attempts to log into GoldMine using whatever username and password is supplied by the user from either the wMobile Manager Console or from the wMobile Login Page.

- **The Use of SYSDIR in GoldMine Corporate Edition 7.x and GoldMine Premium Edition**

Generally speaking, the SYSDIR setting can cause the most difficulty with a wMobile installation. This setting is often used to enforce where a workstation will find GoldMine's program files, where it can find the default locations of Reports and Templates as well as the default locations for linked documents and e-mail attachments. If this setting is not present, then GoldMine will use the path it was started from to determine the SYSDIR location.

Consider the following: Scenario 1:

GoldMine is installed on a server called GMSERVER.
The GoldMine folder is shared on the \\GMSERVER\Apps\ UNC path in the GoldMine folder.
The G: Drive is mapped to \\GMSERVER\APPS
The GM.INI has NO SYSDIR setting.

If the shortcut to GoldMine on my desktop points to \\GMSERVER\APPS\GoldMine\gmw.exe, since there is NO SYSDIR in the GM.INI, then GoldMine will assume that my SYSDIR is: \\GMSERVER\APPS\GoldMine.
If the shortcut to GoldMine on my desktop points to G:\GoldMine\gmw.exe, since there is NO SYSDIR in the GM.INI, then GoldMine will assume that my SYSDIR is G:\GoldMine.

Consider the following: Scenario 2:

GoldMine is installed on a server called GMSERVER.
The GoldMine folder is shared on the \\GMSERVER\Apps\ UNC path in the GoldMine folder.
The G: Drive is mapped to \\GMSERVER\APPS
The GM.INI has SYSDIR set to G:\GoldMine.

If the shortcut to GoldMine on my desktop points to \\GMSERVER\APPS\GoldMine\gmw.exe and the SYSDIR in the GM.INI points to G:\GoldMine, then my SYSDIR will be G:\GoldMine.
If the shortcut to GoldMine on my desktop points to G:\GoldMine\gmw.exe which matches the SYSDIR in the GM.INI, then GoldMine make my SYSDIR G:\GoldMine.

In Scenario 1, since there is no SYSDIR, GoldMine will assume that the SYSDIR is the path from where I am starting GoldMine. If its a UNC path, then my SYSDIR becomes a UNC path. If its a mapped drive letter, then my SYSDIR becomes a mapped drive letter. In

Scenario 2 the GM.INI contains a SYSDIR, so no matter where I start GoldMine from, the setting ensures that the SYSDIR will be G:\GoldMine.

Since the SYSDIR setting can be either a mapped drive letter OR a UNC path, we recommend that the setting be removed from the GM.INI and that all workstations use the method for determining the SYSDIR outlined in Scenario 1. In this case, all users should start GoldMine from the same path to ensure that GoldMine uses to the correct SYSDIR for all users.

- **Final Notes on Changing Paths in the GM.INI**

If there is a requirement that the GM.INI SYSDIR value must be set as a UNC path, this may cause a problem for remote users running the GoldMine spell checking (e.g., remote Citrix users).

To correct this add/edit the following in the GM.INI file's [GoldMine] section to use mapped drive path to avoid problems with GoldMine's speller:

```
[GoldMine]
SSCE_PATH=speller
SSCE_PATH=(GOLDMINE_ROOT_FOLDER)\speller\ssce_lex\ssceam.tlx
SSCE_PATH=(GOLDMINE_ROOT_FOLDER)\speller\ssce_lex\ssceam2.clx
```

Example:
```
SSCE_PATH=D:\Apps\GoldMine\speller\ssce_lex\ssceam.tlx
SSCE_PATH=D:\Apps\GoldMine\speller\ssce_lex\ssceam2.clx
```

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2.1.4.3   How Do I Determine if a Drive Letter is a Mapped Drive

- **In Any Version of Windows**

1. Double-click on **My Computer**.
2. Find the **drive letter** from the value in **SYSDIR** referenced in the **GM.INI** file. Example: If **SYSDIR=W:\GoldMine**, then you will need to right-click on the drive letter **W:**.
3. Right-click on the **drive** and select **Properties**.
4. Check the **Type** on the **General** tab.
5. If the **Type** is **Network Drive**, then the drive letter is a mapped drive.

6. If the **Type** is **Local Disk**, then the drive letter is NOT a mapped drive.

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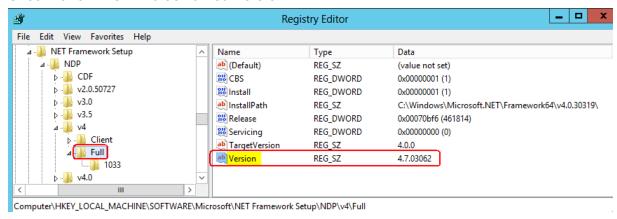## 2.1.5   Checking if .NET Framework is Installed

The wMobile installer determines if the required .NET Framework is installed on your server(s): GoldMine and Web. Please see [.NET Framework](#) requirements for details.

Determine Which .NET Framework Version(s) Are Installed

To find .NET Framework versions by viewing the registry:

1. Click on the **Start** menu or use the Windows Logo Key ⊞ on the keyboard.
2. Enter **regedit.exe**.Select **regedit** from the resulting list.
   You must have administrative credentials to run regedit.exe.
3. In the Registry Editor, open the following subkey:
   HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\NET Framework Setup\NDP\v4\Full

---

📄 **NOTE**: The "NET Framework Setup" folder in the registry does not begin with a period.

Check for a DWORD value named Version.

📄 **NOTE**: If the **Full** subkey is not present, then you do not have a the .NET Framework installed.

See Also:

- [How To Download and Install .NET Framework](#)
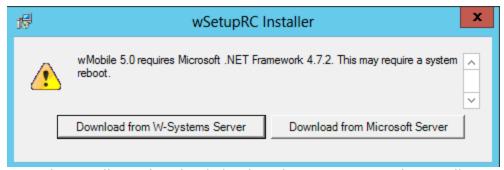
[Return to the Pre-Installation Checklist](#)

2.1.5.1 How To Install .NET Framework

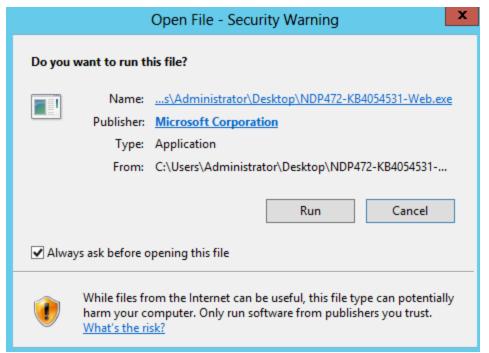**Downloading and Installing .NET Framework**

.NET Framework 4.7.2 can be installed on the following operating systems:
- Windows Small Business Server 2011 [64-bit (x64) processor]
- Windows Server 2012 (All Editions) [64-bit (x64) processor]
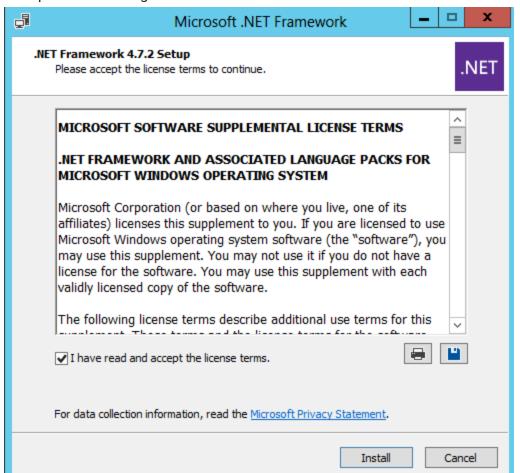- Windows Server 2016 (All Editions) [64-bit (x64) processor]
- Windows Server 2019 (All Editions) [64-bit (x64) processor]

wMobile 5.x has a prerequisite for .NET Framework v4.7.2 (or higher). If the installer detects that this is not installed, it will present options to download from the wMobile or Microsoft Server:
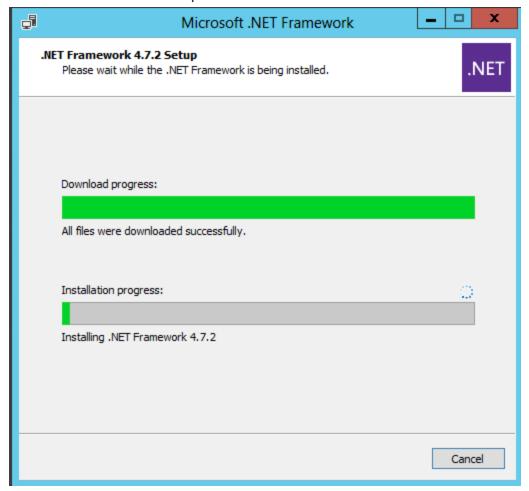

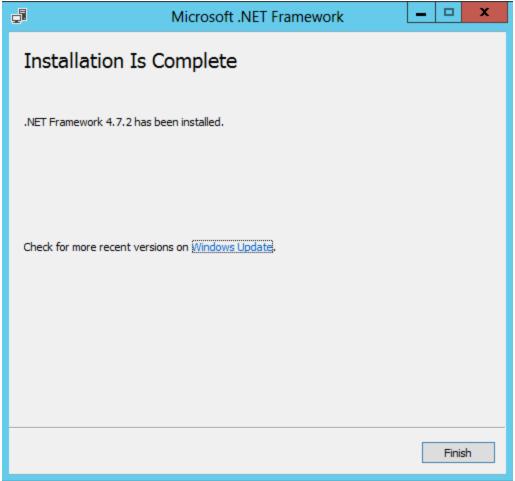Once the installer is downloaded, select the option to Run the install.

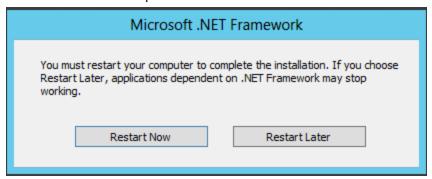Accept the license agreement:

The installation wizard will proceed.

It is likely that a server reboot will be required. In this case, the restart can be done immediately or at a later time. The wMobile installer will not recognize the installation until a reboot is completed.

After restarting the server, run the previously downloaded wSetup.exe file again.
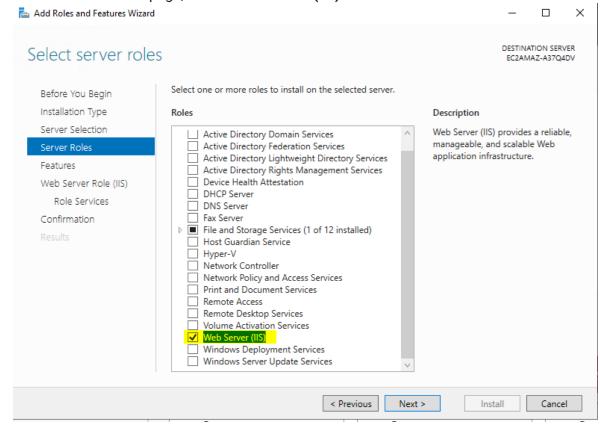
[Return to the Pre-Installation Checklist](#)

2.1.6   How To Verify IIS and Required Roles and Features are Installed
To determine if IIS is installed, do the following on the Web Server:

- **For All Versions of Windows**

1.   Click **Start > Run** (or **<Windows Logo Key ⊞ + R>**).

2.   In the **Open** box, type **regedit** and then click **OK**.

3.   Navigate to the following key in the registry:
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\InetStp

4.   There should be an entry named: **VersionString** containing a value.

5.   If the registry key and **VersionString** entry is present, then IIS is installed.

- **See the link below for screenshots of the required roles and features on your server operating system:**
   - How To Install IIS on Windows Server 2019 (All Editions)
   - How To Install IIS on Windows Server 2016 (All Editions)
   - How To Install IIS on Windows Server 2012 (All Editions)

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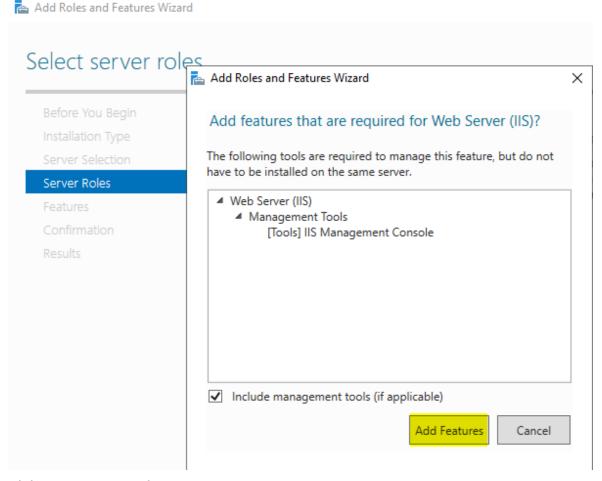### 2.1.6.1   How To Install IIS On Windows Server 2019 (All Editions)

Installing IIS on Windows Server 2019

1. Open Server Manager by clicking the **Server Manager** icon on the desktop.

2. In the **Server Manager** window, with the **Dashboard** and **Quick Start** selected, click **Add roles and fea**tures, or click the **Manage** menu, and then click **Add Roles and Features**. The **Add Roles and Features Wizard** will start with a **Before You Begin** page. The wizard asks for verification of the following:

   - The administrator account has a strong password.

   - The network settings, such as IP addresses, are configured.

   - The most current security updates from Windows® Update are installed.

3. On the **Before You Begin** page, click **Next**.

4. On the **Installation Type** page, select **Role-based or feature-based installation** to configure a single server. Click **Next**.

5. On the **Server Selection** page, select **Select a server from the server pool**, and then select a server; or select **Select a virtual hard disk server**, select a server to mount the VHD on, and then select a VHD file. Click **Next**.

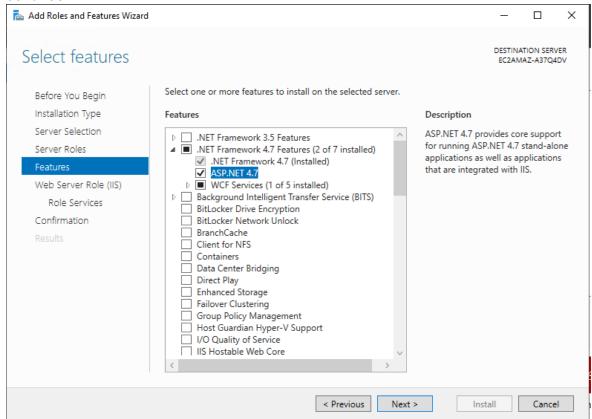6. On the **Server Roles** page, select **Web Server (IIS)**.

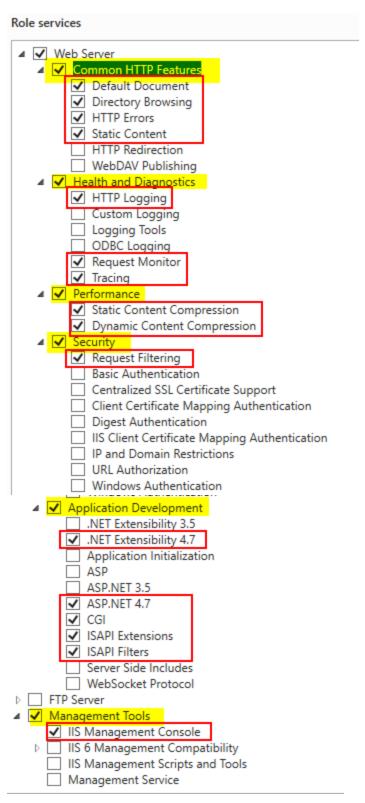7. Select **Add Features** when prompted.

8. Clck **Next** to proceed.

9. On the Features page, select the .NET Framework 4.7 and ASP.NET features below if they are not already installed, and any others you'd like to install. Click **Next** to

continue.

10. On the **Web Server Role (IIS)** page, click **Next**.

11. On the **Role Services** page, be sure these specific roles (designated below in red) are "checked."
If you select a role service that requires other role services or features to be installed, a page will be opened indicating the role services or features to be installed. Leave **Include management tools (if applicable)** selected to select the install management tools associated with the server role. You may not need the management tools on the destination server if you plan to manage the role remotely. Click **Add Features** to add the required role services or features. Click **Next** when all desired selections have been checked.

12. On the **Confirmation** page, verify the role services and features that are selected. Select **Restart the destination server automatically if required** to restart the destination server if the settings need to take immediate effect. To save the configuration information to

an XML-based file that you can use for unattended installations with Windows PowerShell, select **Export configuration settings**, move to the appropriate path in the **Save As** dialog box, enter a file name, and then click **Save**.
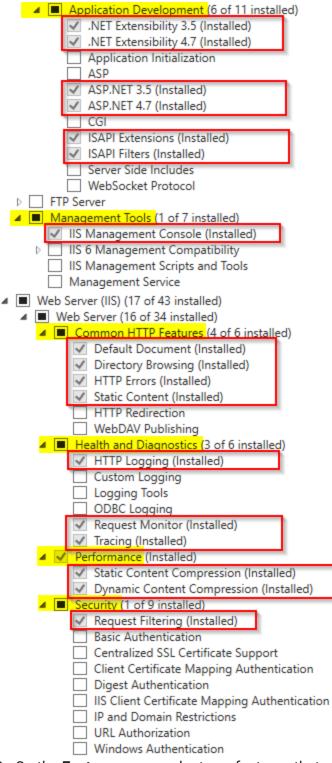When you are ready to start the installation process on the **Confirmation** page, click **Install**.

13. The **Installation Progress** page is displayed. You can close the wizard without interrupting running tasks. You can view task progress or open the page again by clicking **Notifications** in the notification area, and then clicking **Task Details**.

14. On the **Results** page, verify that the installation succeeds, and then click **Close**.

15. Confirm that the Web server works by opening a web browser, and verifying that the default web page is displayed when you use the **http://localhost** address.

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2.1.6.2   How To Install IIS On Windows Server 2016 (All Editions)

Installing IIS on Windows Server 2016

1. Open Server Manager by clicking the **Server Manager** icon on the desktop.

2. In the **Server Manager** window, with the **Dashboard** and **Quick Start** selected, click **Add roles and fea**tures, or click the **Manage** menu, and then click **Add Roles and Features**. The **Add Roles and Features Wizard** will start with a **Before You Begin** page. The wizard asks for verification of the following:

   - The administrator account has a strong password.

   - The network settings, such as IP addresses, are configured.

   - The most current security updates from Windows® Update are installed.

3. On the **Before You Begin** page, click **Next**.

4. On the **Installation Type** page, select **Role-based or feature-based installation** to configure a single server. Click **Next**.

5. On the **Server Selection** page, select **Select a server from the server pool**, and then select a server; or select **Select a virtual hard disk server**, select a server to mount the VHD on, and then select a VHD file. Click **Next**.

6. On the **Server Roles** page, select **Web Server (IIS)**.

7. In the **Add Roles and Features** wizard, click **Add Features** to install the IIS Management Console, and then click **Continue**.

8. On the **Server Roles** page, be sure these specific roles (designated below in red) are "checked" and then click **Next**.

9. On the **Features** page, select any features that you would like to install, and then click **Next**. Note that you do not need to select any features on this page to install IIS. IIS setup will select the features that are required.

10. On the **Web Server Role (IIS)** page, click **Next**.

11. On the **Role Services** page, select any additional role services that you want to install.

12. If you selected a role service that requires other role services or features to be installed, a page will be opened indicating the role services or features to be installed. Leave **Include management tools (if applicable)** selected to select the install management tools associated with the server role. You may not need the management tools on the destination server if you plan to manage the role remotely. Click **Add Features** to add the required role services or features.

13. After you have added the role services that you need on the **Role Services** page, click **Next**.

14. On the **Confirmation** page, verify the role services and features that are selected. Select **Restart the destination server automatically if required** to restart the destination server if the settings need to take immediate effect. To save the configuration information to an XML-based file that you can use for unattended installations with Windows PowerShell, select **Export configuration settings**, move to the appropriate path in the **Save As** dialog box, enter a file name, and then click **Save**.
When you are ready to start the installation process on the **Confirmation** page, click **Install**.

15. The **Installation Progress** page is displayed. You can close the wizard without interrupting running tasks. You can view task progress or open the page again by clicking **Notifications** in the notification area, and then clicking **Task Details**.

16. On the **Results** page, verify that the installation succeeds, and then click **Close**.

17. Confirm that the Web server works by opening a web browser, and verifying that the default web page is displayed when you use the **http://localhost** address.
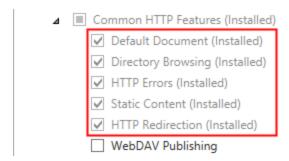
2.1.6.3   How To Install IIS On Windows Server 2012 (All Editions)
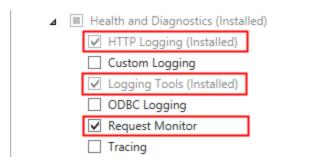
Installing IIS on Windows Server 2012

1. Open Server Manager by clicking the **Server Manager** icon on the desktop.

2. In the **Server Manager** window, with the **Dashboard** and **Quick Start** selected, click **Add roles and fea**tures, or click the **Manage** menu, and then click **Add Roles and Features**. The **Add Roles and Features Wizard** will start with a **Before You Begin** page. The wizard asks for verification of the following:

   - The administrator account has a strong password.

   - The network settings, such as IP addresses, are configured.

   - The most current security updates from Windows® Update are installed.

3. On the **Before You Begin** page, click **Next**.

4. On the **Installation Type** page, select **Role-based or feature-based installation** to configure a single server. Click **Next**.

5. On the **Server Selection** page, select **Select a server from the server pool**, and then select a server; or select **Select a virtual hard disk server**, select a server to mount the VHD on, and then select a VHD file. Click **Next**.

6. On the **Server Roles** page, select **Web Server (IIS)**.

7. In the **Add Roles and Features** wizard, click **Add Features** to install the IIS Management Console, and then click **Continue**.

8. On the **Server Roles** page, be sure these specific roles (designated below in red) are "checked" and then click **Next**.

Common HTTP Features:

Health and Diagnostics:

Performance

Security

Application Development

Management Tools

9. On the **Features** page, select any features that you would like to install, and then click **Next**. Note that you do not need to select any features on this page to install IIS. IIS setup will select the features that are required.

10. On the **Web Server Role (IIS)** page, click **Next**.

11. On the **Role Services** page, select any additional role services that you want to install.

12. If you selected a role service that requires other role services or features to be installed, a page will be opened indicating the role services or features to be installed. Leave **Include management tools (if applicable)** selected to select the install management tools associated with the server role. You may not need the management tools on the destination server if you plan to manage the role remotely. Click **Add Features** to add the required role services or features.

13. After you have added the role services that you need on the **Role Services** page, click **Next**.

14. On the **Confirmation** page, verify the role services and features that are selected. Select **Restart the destination server automatically if required** to restart the destination server if the settings need to take immediate effect. To save the configuration information to an XML-based file that you can use for unattended installations with Windows PowerShell, select **Export configuration settings**, move to the appropriate path in the **Save As** dialog box, enter a file name, and then click **Save**.
When you are ready to start the installation process on the **Confirmation** page, click **Install**.

15. The **Installation Progress** page is displayed. You can close the wizard without interrupting running tasks. You can view task progress or open the page again by clicking **Notifications** in the notification area, and then clicking **Task Details**.

16. On the **Results** page, verify that the installation succeeds, and then click **Close**.

17. Confirm that the Web server works by opening a web browser, and verifying that the default web page is displayed when you use the **http://localhost** address.

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2.1.7   SQL Server - Creating a New SQL User
This action is performed on the SQL Server that hosts GoldMine's database.

To create a new SQL User, do the following:

1. Open **SQL Server Management Studio**.

2. Login as either **sa** or **Administrator** (or a user with equivalent privileges).

3. Expand the **Security** folder.

4. Expand the Logins folder.

5. Right-click on the **Logins** folder and select **New Login**.

6. Provide a Login name in the **Login name** field.

7. Select **SQL Server authentication**.

8. Provide a password in the **Password** and **Confirm password** fields. The password complexity requirements include that the password is at least 8 characters long and contains upper case letters, lower case letters, a number (0-9), and/or a non-alpha character such as an exclamation point (!), dollar sign ($), number sign (#) etc. The password cannot contain the account name of the user.

9. Uncheck the following: **Enforce password expiration**, and **User must change password at next login**.

10. Click **User Mapping**.

11. Click **Map** next to the GoldMine database in the **Users mapped to this login** section.

12. Type **dbo** in the **Default Schema** field.

13. Click **db_owner** in the **Database role membership** section.

14. Click **OK**.

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2.1.8   SQL Server - Checking For Database Mapping and Role Membership
This check is performed on the SQL Server that host's GoldMine's database.

To check to see what database mappings and roles a username has, do the following:

1. Open **SQL Server Management Studio**.

2. Login as either **sa** or **Administrator** (or a user with equivalent privileges).

3. Expand the **Security** folder.

4. Expand the **Logins** folder.

5. Right-click on the **SQL User** and select **Properties**.

6. Click on the **User Mapping** page in the left column.

7. Verify that the **Map** column checkbox is checked next to the **GoldMine** database under the **Users mapped to this login** list.
   NOTE: Your database name might be different than the database alias name in **GoldMine**.

8. Verify that the **db_owner** checkbox is checked in the **Database role membership** section.

2.1.9   Creating a Service Account
This action is performed on the GoldMine Server.

To create a Service Account for wMobile, do the following:

- **For Servers or Computers that *ARE NOT* part of an Active Directory:**

1. Right-click on **My Computer**.
2. Select **Manage**.
3. Expand **Configuration**.
4. Expand **Local Users and Groups**.
5. Click on **Users**.
6. Right-click on the **Users** folder and select **New User**.
7. Provide a logon name in the **User name** field.
8. Provide a full name in the **Full name** field.
9. Provide a password in the **Password** and **Confirm password** fields.
10. Tick the **Password never expires** check box.
11. Click **Create**.

- **For Servers or Computers that *ARE* part of an Active Directory:**

1. Log into **Domain Controller** as a **Domain Administrator**.
2. Click on **Start > Settings > Control Panel**.
3. Double-click on **Administrative Tools**.
4. Double-click on **Active Directory Users and Computers**.
5. Expand the **Domain** object.
6. Right-click the **Users** folder.
7. Select **New User**.
8. Provide a first name in the **First name** field.

9. Provide a last name in the **Last name** field.

10. Provide a logon name in the **User name** field.

11. Click **Next**.

12. Provide a password in the **Password** and **Confirm password** fields.

13. Tick the **Password never expires** check box.

14. Click **Next**.

15. Click **Finish**.

[Return to the Pre-Installation Checklist](#)

2.1.10 How To Set File Permissions
This action is performed on the GoldMine Server.

To Set Permissions on the GoldMine folder for the Service Account, do the following:

- **For Servers or Computers that ARE NOT part in an Active Directory**

1. Browse to your **GoldMine** folder.

2. Right-click on the **GoldMine** folder and select **Properties**.

3. Click the **Security** tab.

4. Click **Add**.

5. Click **Advanced**.

6. Click **Find Now**.

7. Locate and double-click on the **Service Account**.

8. Click **OK**.

9. Check the boxes for **Modify**, **Read & Execute**, **List folder contents**, **Read and Write** under the **Allow** column.

10. Click **OK**.

- **For Servers or Computers that ARE part in an Active Directory**

1. Browse to your **GoldMine** folder.

2. Right-click on the **GoldMine** folder and select **Properties**.

3. Click the **Security** tab.

4. Click **Add**.
   NOTE: Check to see that the **Active Directory Domain** is listed in the **From this location** box. ***If it is not, follow steps 4.1 through 4.4***: 4.1. Click the **Locations** button.
   4.2. Expand **Entire Directory**.
   4.3. Select the **Active Directory Domain** that contains the **Service Account**. **NOTE**: _DO NOT EXPAND_ the Domain, you simply need to select it.
   4.4. Click **OK**.

5. Click **Advanced**.

6. Click **Find N**ow.

7. Locate and double-click on the **Service Account**.

8. Click **OK**.

9. Click the boxes for **Modify**, **Read & Execute**, **List folder contents**, **Read and Write** under the **Allow** column.

10. Click **OK**.

[Return to the Pre-Installation Checklist](#)

2.1.11   Discussion: Service Account vs. Local System Account
Local System Account

By default, the local system account and the local administrator account have the same file privileges, but they have different functions. Services starting as the local system account will be given the computers privileges on the network (accessing other computers AS the computer, instead of as a specific user). The local system account can be assigned Permissions to files on the local server and, by default, is granted full control over all the files on the server. It cannot be added to domain user groups. This account does not recognize mapped drive letters and cannot access most UNC paths (even if the UNC path is on the local machine). When the Remote GoldMine Service is installed, this is the default user. If this user is selected as the account to run the Remote GoldMine Service, any files (including the GoldMine folder or any linked documents) that are on a UNC path will not be accessible in wMobile.

Service Account

A service account is a user account that is created with the sole purpose of providing a specific security context to a service when the service is running. As opposed to the local

system account, which acts as the server itself, a service account can be given access and permissions on UNC paths on a different computer and can be assigned to user groups on a Windows Domain. A service account does not recognize mapped drive letters. A service account can be specified when installing the Remote GoldMine Service. The Remote GoldMine Service can also be reconfigured with a service account at a later time in the Services panel if an account is not available at install time.

For creating a service account, see: Creating a Service Account

Return to the Pre-Installation Checklist

2.1.12 Discussion: Opening Ports in the Firewall

Generally speaking, the following ports need to be opened for wMobile to be accessed from the Internet:

- **Scenario 1: GoldMine Server, SQL Server and Web Server are behind the same firewall.**

- With No SSL Certificate (Provides basic Non-Encrypted Communication between the Mobile Device and the Web Server)
  ☐TCP Port 80 from the Internet to the Web Server.

  ☐With an SSL Certificate (Provides Encrypted Communication between the Mobile Device and the Web Server)
  ▪ TCP Port 443 from the Internet to the Web Server.

- **Scenario 2: GoldMine Server and SQL Server are behind a firewall, the Web Server is in a DMZ**

  ☐From the Web Server in the DMZ to the GoldMine Server
  ▪ TCP Ports 8085 and 2121

  ☐From the Web Server in the DMZ to the SQL Server
  ▪ TCP Port 1433

  ☐Web Server to the Internet
  ▪ With No SSL Certificate (Provides basic Non-Encrypted Communication between the Mobile Device and the Web Server)

❖TCP Port 80 from the Internet to the Web Server.

▪ With an SSL Certificate (Provides Encrypted Communication between the Mobile Device and the Web Server)
❖TCP Port 443 from the Internet to the Web Server.

- **Scenario 3: GoldMine Server, SQL Server and Web Server are behind the same firewall. Customer has Blackberry Enterprise Server**
☐No open ports required. wMobile will be shared automatically through BES.

- Scenario 4: GoldMine Server, SQL Server and Web Server are behind the same firewall with Port Redirection.

☐With No SSL Certificate (Provides basic Non-Encrypted Communication between the Mobile Device and the Web Server)
  ▪ Any TCP port from the Internet to TCP Port 80 on the Web Server (Assuming IIS is configured to use TCP Port 80 for non-SSL requests).

☐With an SSL Certificate (Provides Encrypted Communication between the Mobile Device and the Web Server)
  ▪ Any TCP Port from the Internet to TCP Port 443 on the Web Server (Assuming IIS is configured to use TCP Port 443 for SSL requests).

> ⚠ **IMPORTANT**: <u>**For Blackberry Owners Only**</u>: The standard browser that comes installed on the Blackberry does not support accessing websites on TCP ports other than 80 or 443. If you own a Blackberry and do not own a Blackberry Enterprise Server, then you must configure your firewall to allow access to wMobile on TCP Port 80 for Non-SSL traffic or TCP Port 443 for SSL traffic.

Return to the Pre-Installation Checklist

2.1.13   Use of SSL Certificate

Using an SSL certificate with the HTTPS (Hypertext Transfer Protocol Secure) protocol provides encrypted communication between the mobile device and the Web Server. If a customer wishes to use the HTTPS (Hypertext Transfer Protocol Secure) protocol, they must obtain and install an SSL certificate in IIS. SSL certificates can be obtained from certificate

authorities such as Go Daddy, DigiCert, Global Sign, etc. (**Note**: wMobile does not endorse any particular certificate authority.)

A customer can also create a self-signed (free) certificate. These certificates are easy to generate, but do not provide the security of a certificate signed by a certificate authority. Since anyone can generate a self-signed certificate, there's no real guarantee you're connecting to the intended server. Another downside of self signed certificates is that people (your wMobile end users) who visit a website using a self-signed certificate will see a warning in their browser that the certificate was not issued by a certificate authority. There are many websites that provide information on creating self-signed certificates, including this Microsoft reference: https://support.microsoft.com/en-us/help/228991/how-to-create-and-install-an-ssl-certificate-in-internet-information-s

wMobile Phone and Desktop components can be installed using the Advanced Installation method in order to select the HTTPS protocol.

If wMobile is already installed, and a change to HTTPS is needed, please contact goldminesupport@sugarcrm.com for assistance. The steps will vary depending upon existing installation configuration.

2.1.14 How To Verify ASP.NET Is Installed and Enabled
This check is performed on the Web Server.
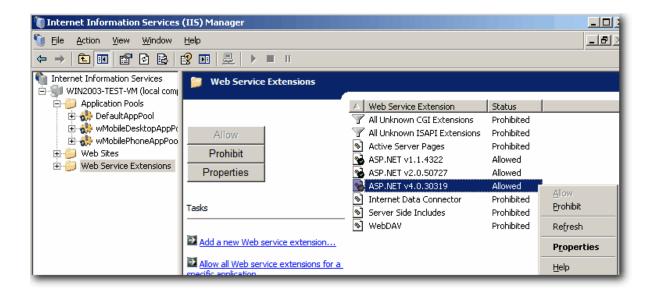
To check to see if ASP.NET 4.0 is installed and registered with IIS, do the following:

- **For All Versions of Windows**

1. Click **Start** and then click **Run**.
2. In the **Open** box, type **Regedit** and then click **OK**.
3. Look for the following key in the registry:
   HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\ASP.NET\4.0.30319.0
4. With the **4.0.30319** key selected in the left-hand window, look for the **DllFullPath** entry in the right-hand window.
5. If the **DllFullPath** entry is present and has a path value in the **Data** column, then ASP.NET is installed and registered with IIS.

- **ASP.NET** is a component of the **.NET Framework**. If **ASP.NET** is not installed, see the section on How to Install .NET Framework.

In **IIS 6**, check to verify that **ASP.NET 4.0** is enabled. (In **IIS 7/8**, the **ASP.NET** version is set per application pool, so this check is not applicable.)

1. Click **Start** and then click **Run**.

2. In the **Open** box, type **inetmgr** and then click **OK**. This will open IIS.

3. Click on the **+** sign to expand the server to display the **Application Poo**ls, **Web Sites** and **Web Service Extensions** folders.

4. Select **Web Service Extensions**.

5. Verify that **ASP.NET v4.0.30319** listed on the right has a status of **Allowed**. If not, right click on it and set it to **Allow** as shown below.

Return to the Pre-Installation Checklist

2.2 Installation

Verify the Installation Requirements

Please review the Pre-Installation Checklist before starting a new wMobile installation or upgrading an existing previous version of wMobile to the latest version to be sure that your environment meets the minimum hardware and software requirements.

2.2.1   Preparing for Installation

wMobile Components

There are eight (8) main components to wMobile:

.NET Framework 4.7.2 (or higher)
The .NET Framework is a prerequisite for wMobile 5.x. It will need to be installed on the server prior to installing wMobile. If you will be implementing a split install (with the Remote GoldMine Service on one server and the other components on a web server) the .NET Framework will be required on both servers.

Remote GoldMine Service (RGMS)
The Remote GoldMine Service provides communication between wMobile and GoldMine. The Remote GoldMine Service can be installed on the GoldMine server or on the IIS server (Web server), provided GoldMine can be accessed by a network share if it is not installed on the same server. This service is used for logins.

wMobile Phone Edition
This component is the web application you view when you connect to wMobile from a web browser on your PDA such as Blackberry, iPhone, Droid, etc. The wMobile Phone Edition component is installed on the server running IIS.

wMobile Desktop Edition
This component is the web application you view when you connect to wMobile from a web browser on a workstation, laptop, iPad, or tablet. The wMobile Desktop component is installed on the server running IIS.

wMobile Email Fetcher Service
This component fetches email for wMobile and handles email processing.

wMobile Manager Console
The wMobile Manager Console is a tool that provides administrators with the ability to customize wMobile's menus, security, user email accounts, and application settings. This is a Windows application and is always installed on the same server as wMobile.

Crystal Report Runtime Engine
This a required component for wMobile Desktop Edition. It is installed on the IIS server along with the wMobile Desktop component.

wMobile Diagnostics Installer

The wMobile Diagnostics tool is used to diagnose problems if wMobile is not working correctly and optionally send diagnostics logs to wMobile Support as required. If you will be implementing a split install (with the Remote GoldMine Service on one server and the other components on a web server) we recommend that you install the wDiagnostic component on BOTH servers.

PLEASE READ BEFORE STARTING INSTALLATION

1. Verify your system meets the all of the system requirements by referring to the Pre-Installation Checklist.

2. Check the GM.INI file in the GoldMine root directory and ensure that, if present, the SYSDIR setting is set to a Mapped Drive, Universal Naming Convention (UNC) path using the server name, or a local path.

3. In the case of a mapped drive, it must be configured in the wMobile Manage Console Virtual File System (VFS) Settings after installation to ensure access to GoldMine files (such as the license, executable and dll files) as well as documents.

4. In the case of a UNC path, you might need to change the service user for the Remote Login Service following the installation of the Remote GoldMine Service. This service user must have read/write access to GoldMine's network share (for more information on service accounts see: Service Account vs. Local System Account).

5. If required, the wMobile Download Manager will install all of the prerequisites first and then install the application components. Save time by downloading and installing the prerequisites before installing wMobile.

6. Ensure that TCP Port 80 or TCP Port 443 has been redirected in your firewall to your Web server to allow access to wMobile from outside of your network.

7. If you wish to use the HTTPS protocol, a certificate should be obtained and installed in IIS on the web server hosting wMobile.

2.2.2 Installation Scenarios for wMobile

Installing wMobile on the GoldMine Server (Single Server Installation)

Scenario: You have a single server that hosts GoldMine and IIS.

NOTE: Ensure that your server meets both the GoldMine and Web Server Requirements.

<u>**On the Server**</u>

<u>**Installed by an admin user on server:**</u>

Prerequisites (Installed only if needed):
- .NET Framework 4.7.2 (or higher) (This installation may require a server restart depending on components installed.)

Required:
- IIS ([Please confirm that the required roles and services are installed for your server version](#).)
- ASP.NET

<u>**Installed by wMobile Setup:**</u>

wMobile Components:
- Remote GoldMine Service
- wMobile Phone Edition
- wMobile Desktop Edition
- wMobile E-mail Fetcher
- wMobile Manager Console
- Crystal Reports Runtime files
- wMobile Diagnostics Installer

Installing wMobile on a Separate Web Server (Split Server Installation)

Scenario: You have a GoldMine server, but you want to host IIS on a different server.

<u>**On the GoldMine Server**</u>

<u>**Installed by an admin user on server:**</u>

Prerequisites (Installed only if needed):
- .NET Framework 4.7.2 or higher (This installation may require a server restart depending on components installed.)

Installed by wMobile Setup:

wMobile Components:
- Remote GoldMine Service
- wDiagnostics

On the Web Server

Installed by an admin user on server:

Prerequisites (Installed only if needed):
- .NET Framework 4.7.2 or higher (This installation may require a server restart depending on components installed.)

- **Required:**
- IIS (Please confirm that the required roles and services are installed for your server version.)
- ASP.NET

Installed by wMobile Setup:

wMobile Components:
- wMobile Phone Edition
- wMobile Desktop Edition
- wMobile E-mail Fetcher
- wMobile Manager Console
- Crystal Reports Runtime files
- wMobile Diagnostics
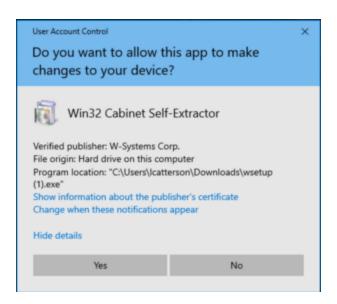
2.2.3 Installing wMobile for the First Time

The **wMobile Download Manager** will determine if you need to install the various prerequisites, components and services required for wMobile. In addition, it can also determine if you are upgrading from a previous version or updating an existing version of wMobile.

1. Download the Installer from this link:
http://download.w-systems.com/wmobile/setup/5.1/wsetup.exe.
Once you click on the link, you'll be prompted to **Run** or **Save**. Select **Run**.

2. Your server will be checked for prerequisites. If any required components are missing, the installer will inform you. These missing components will need to be installed separately prior to continuing the wMobile installation. To see a list of prerequisites, see: Pre-Installation Checklist (System Requirements). Be sure to check the required IIS roles and features for your server operating system.

3. The wMobile Download Manager application will start. Using the previous section as a guide, you can determine which component will need to be installed on your server. You can select or deselect components by clicking the checkbox next the component name. The Remote GoldMine Service can be installed on the GoldMine server or on the IIS server, provided GoldMine can be accessed by a network share if it is not installed on the same server.
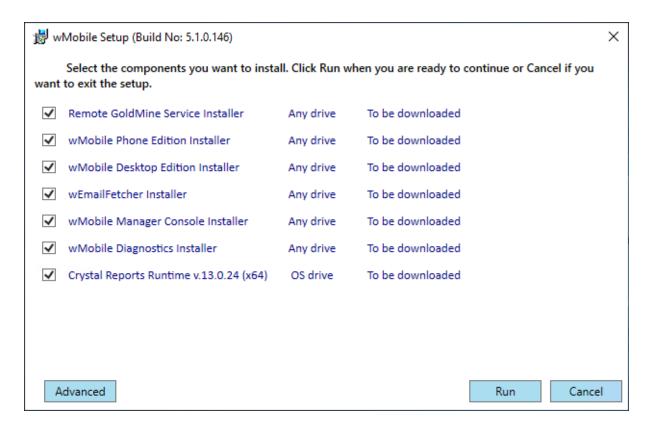
For Single Server Installs:
• Install "all" of the wMobile components.

For Split Server Installs:
• On the GoldMine Server:
  o Remote GoldMine Service Installer
  o wMobile Diagnostics Installer

- On the Web Server:
  - o wMobile Phone Edition Installer
  - o wMobile Desktop Edition Installer
  - o wEmailFetcher Installer
  - o wMobile Manager Console Installer
  - o wMobile Diagnostics Installer
  - o Crystal Reports Runtime Engine
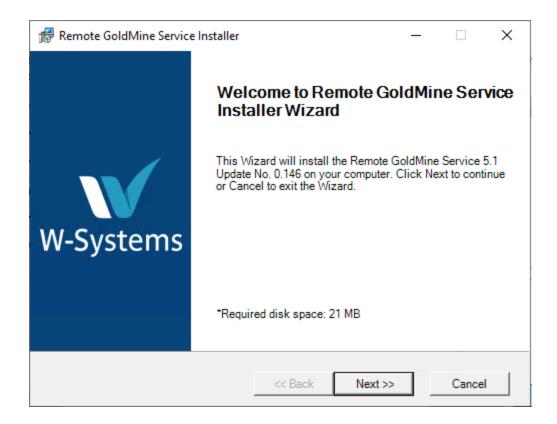
4. When you have selected the appropriate components for your installation type, click **Run**. See related topics for installing each component.

2.2.3.1   Installing the Remote GoldMine Service

How to Install the Remote GoldMine Service

Welcome to the Remote GoldMine Service Setup Wizard.

Click **Next** to proceed.

Review the wMobile License Agreement and click **I Agree** to accept the terms and continue installing the Remote GoldMine Service.
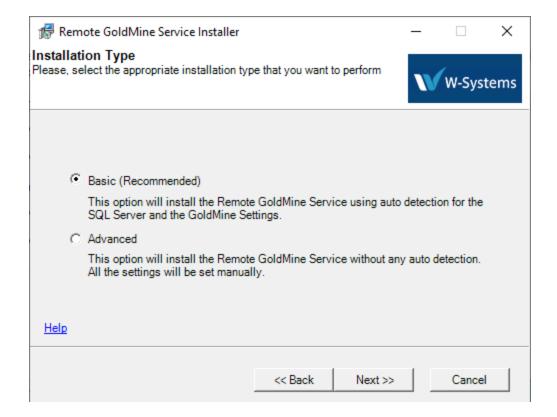
Select the installation type **Basic** or **Advanced**.

The **Basic** option will attempt to auto-detect GoldMine settings. You will still have an opportunity to select the installation path etc.

The **Advanced** option shows the same screens, but does not auto-detect any values. All entries must be made manually.

The **Basic** option is recommended. Once you have selected your option, click **Next**.

The installer will attempt to auto-detect the SQL server information. If it is detected, the server name and SQL username will be filled in for you. Otherwise, select the server from the drop-down list or type in the name of the server. (local) may also be used if SQL is installed on the same server.

Enter the SQL username and password credentials.
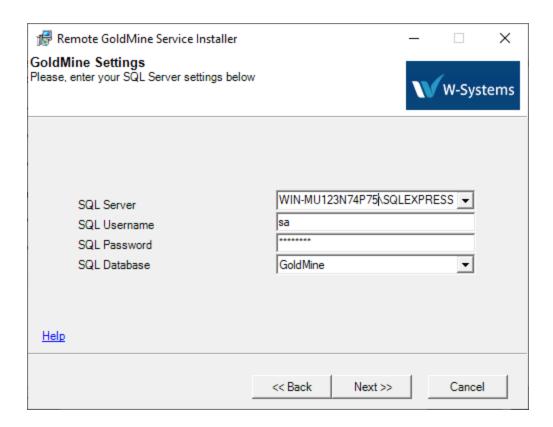
> 📄 **NOTE**: The **SQL Username** must be '**dbo**' on the GoldMine database you plan use with wMobile.

If you don't know the SQL password, another SQL login can be created. See the topic: Creating a New SQL User.

After the SQL credentials are entered successfully, the SQL databases will be available from the **SQL Database** drop-down list. Select the appropriate database and click **Next**.

> 💡 **TIP**: If the **SQL Database** drop-down list does not contain the list of available databases, please re-enter the SQL credentials. The **SQL Database** drop-down list only

populates after entering valid SQL credentials.
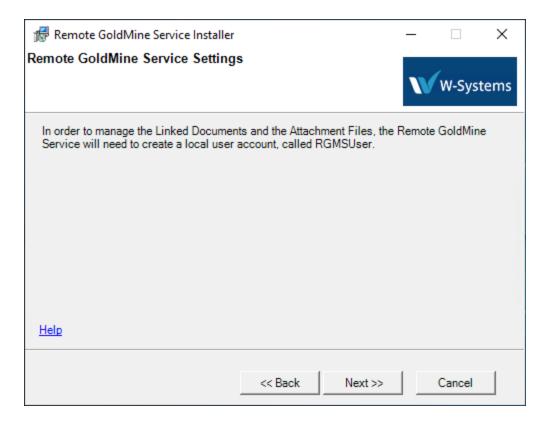
If the installer detects any SQL table names beginning with "**WT_**", a warning will be displayed onscreen. If a copy of wMobile was previously installed to the database being currently installed to, such as from a trial/evaluation, these existing tables will cause a conflict with the new installation. Any old installations should be uninstalled, or the tables should be manually removed. wMobile tables that were created as backups (i.e., having different table names) may exist allowed for the purpose of backing up user settings, and later restoring into a new/clean installation. In this case, proceed with the new install.

If you had an old wMobile install or trial from version 1.x or 2.x, remove these files. If you are migrating wMobile from one server to another, and had wMobile 3.0 or higher installed on the old server, it's ok to install without deleting these tables to preserve existing settings.

A local user account will be created to provide file access. Click **Next**.
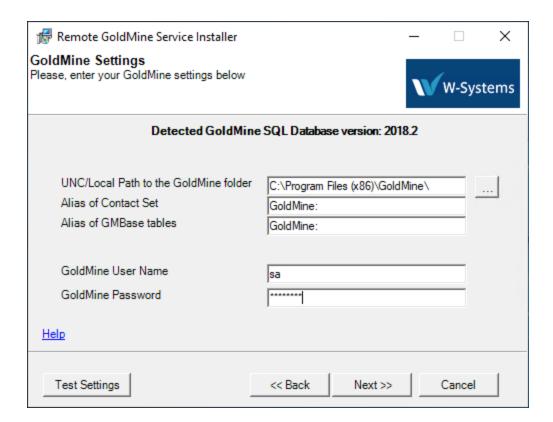
The Remote GoldMine Service installer will attempt to detect the GoldMine version, where GoldMine is installed, and the database alias(es). Verify or change the settings to match your environment. This path should be a local or UNC path.

It is possible that the database alias for the Contact Set and GMBase tables is different from the SQL database name. Check **Help > About GoldMine > System** in your GoldMine to verify the alias(es).
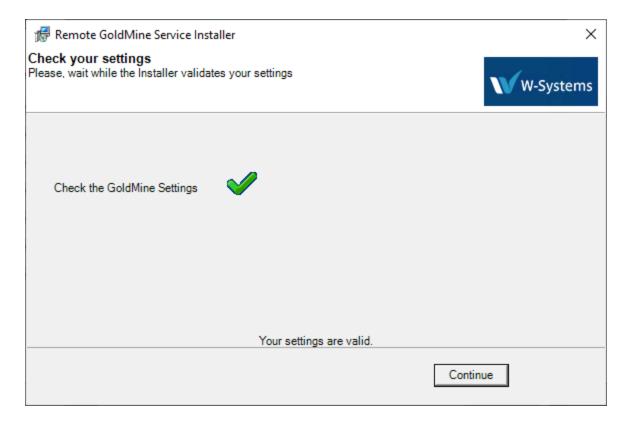
Enter a valid GoldMine username and password. This will be used to check authentication with the GoldMine API.

You can click **Test Settings** to verify all the settings. However, the settings will be tested when you click **Next** in any case.

The GoldMine path used for wMobile is added to the server's Environment Variable path.
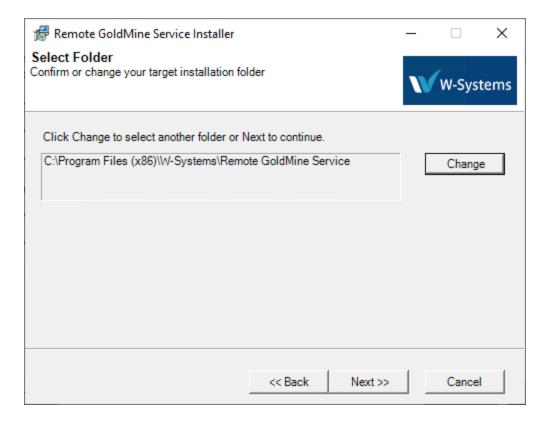
If the settings tested successfully, click **Continue**. Otherwise, go back to check the settings and try again.
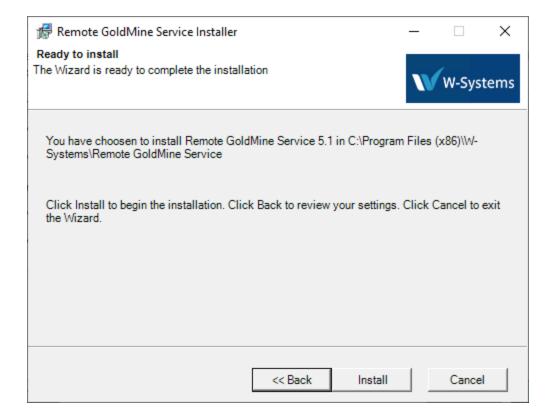
The default location is in C:\Program Files\W-Systems (or C:\Program Files (x86)\W-Systems). Click **Change** to specify a different installation path.

Click **Next** to continue.
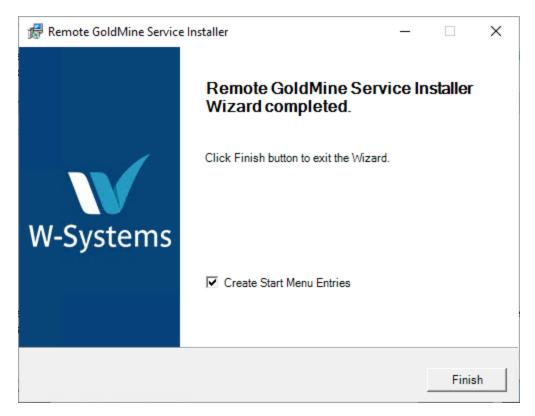
Click **Install**.

Installation may take several minutes to complete. After the product has install, the Remote GoldMine Service will be started automatically.

Optionally click the checkbox to **Create Start Menu Entries**.

Click **Finish** to complete the installation process.

2.2.3.2   Installing wMobile Phone Edition

How to Install wMobile

1.   Welcome to the wMobile Phone Edition Installer Wizard.

Click **Next** to continue.

2. Select the Installation Type:

Select the installation type **Basic** or **Advanced**.

The **Basic** option will attempt to auto-detect GoldMine settings. You will still have an opportunity to select the installation path etc.

The **Advanced** option shows the same screens, but does not auto-detect any values. All entries must be made manually.
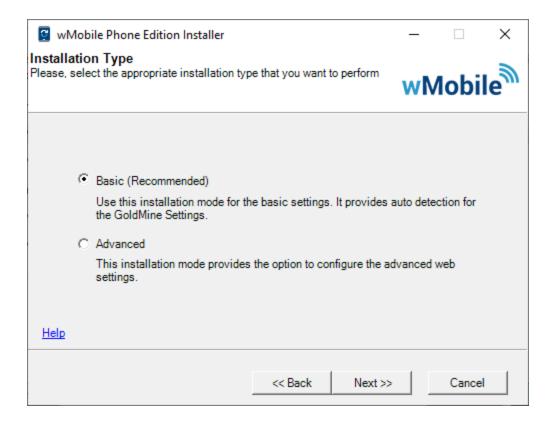
The **Basic** option is recommended unless you'll need to select the https protocol.

2.2.3.2.1 Basic
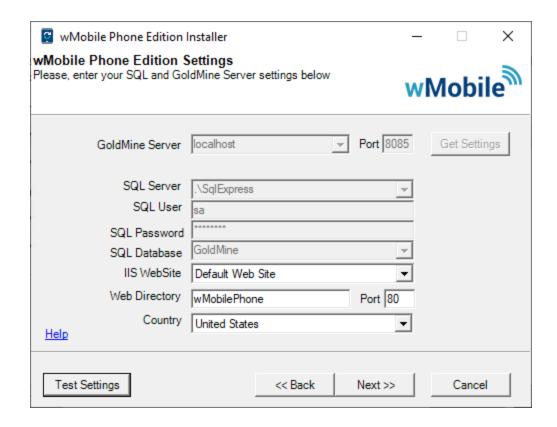
Select the Installation Type: **Basic**

Basic (Recommended): The Basic installation method attempts to auto-detect settings for the installer. This installation type provides the option to review installation options and

make configuration changes. Used the Advanced method if you need to create a new
website or wish to use the HTTPS protocol.

Review the auto-detected settings.

💡 **TIP**: Once the GoldMine Server has been filled in, the **Get Settings** button can be used to pull SQL Server configuration information from the Remote GoldMine Service into the wMobile Installer.

Otherwise, enter or adjust the settings manually.The default is to install into the Default Web Site, but another web site could be created and/or selected. The default port is 80, but another could be selected if you've created another website with a different port.
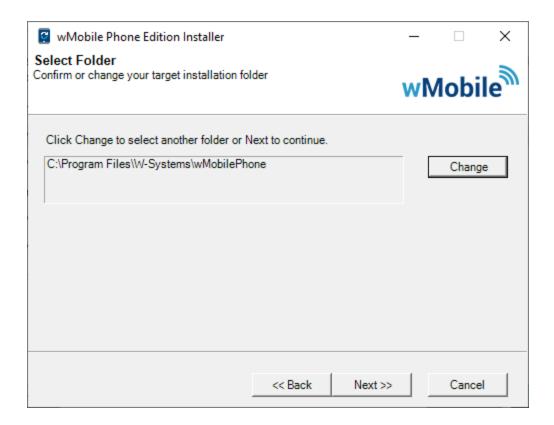
Click **Test Settings** to verify your settings.

Click **Next**.

⚠️ **IMPORTANT**: A **SQL User** with '**dbo**' rights to the database used by GoldMine must be supplied in the **SQL User** field.

The default location is in C:\Program Files\W-Systems. Click **Change** to specify a different installation path.

Click **Next** to continue.
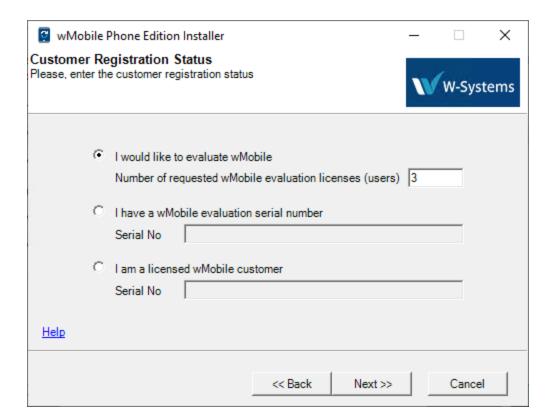
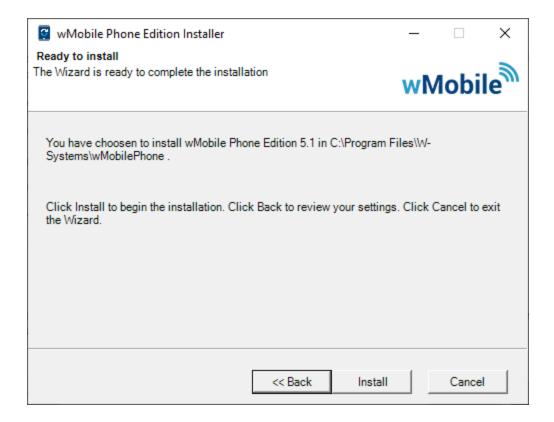On the screen, select the appropriate option for registration status.

- If this an evaluation license, fill in the number of users you'd like to have evaluating wMobile.

- If you have an evaluation serial number, select this option and enter the serial number.

- If you have purchased wMobile then enter the wMobile serial number.

NOTE: If this a re-installation, you would need a new wMobile license. It is not possible to activate an old wMobile license on a new machine. Email goldminesupport@sugarcrm.com for a new license.
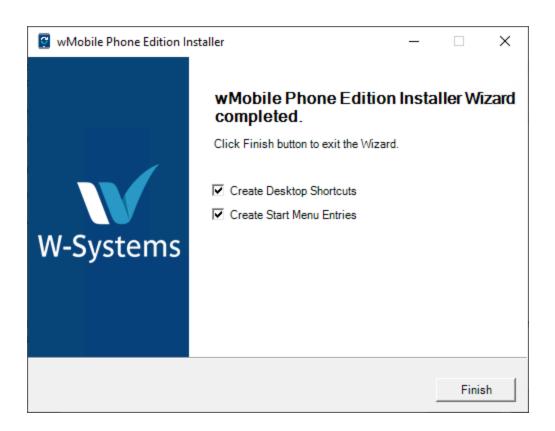
Once your selection is made, click **Next** to proceed.

Click **Install** to complete the installation.

Optionally check to **Create a Desktop** shortcut and **Create Start Menu Entries**.
Click **Finish**.

2.2.3.2.2 Advanced

Select the Installation Type: **Advanced**

Advanced: This installation mode provides the option to configure installation location and advanced web settings. This should be used if the application (wMobile) will need to use its own port, application pool, and/or custom settings. This method also provides the option to use the HTTPS protocol.

This installation method also provides the option to skip any web configuration. In this event the web settings would need to be added manually in IIS after the installation. No web site, virtual directory, or app pool would be defined during the installation.

The installer will attempt to auto-detect the SQL server.

💡 **TIP**: Once the GoldMine Server has been filled in, the **Get Settings** button can be used to pull SQL Server configuration information from the Remote GoldMine Service into the wMobile Installer.


Otherwise, enter the appropriate server values for the SQL server where the GoldMine database is hosted.

Click **Test Settings** to verify your settings.

Click **Next**.

⚠️ **IMPORTANT**: A **SQL User** with '**dbo**' rights to the database used by GoldMine must be supplied in the **SQL User** field.


Select **Existing Web Site** to use the default web site.

- or -

Select **Create New Web Site** and enter the values if you are defining a new web site. The default port is 8081 but can be changed.

Note: Using the Advanced install method for both wMobile Phone and wMobile Desktop would result in two separate websites, requiring separate open ports. It is possible to create the website in advance, to be selected for both wMobile Phone and wMobile Desktop. Another option is to use the Advanced install method for for installing wMobile Phone into a new website, such as wMobile, then use the basic install method for wMobile Desktop to install into the same web site. All web apps within the website will inherit the properties of the web site including the protocol and port.
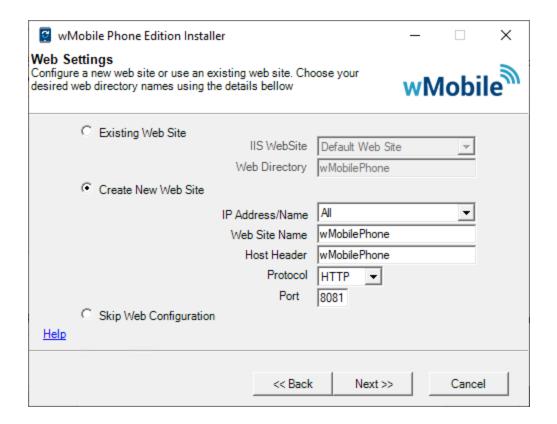
IP Address/Name - This can be any machine name or IP address.

Web Site Name -This can be any name; wMobilePhone is a logical name.

Host Header - The Host Header is a name for the web site node. wMobile is a logical name. It is not a mandatory field.

Protocol - HTTP is the default setting. HTTPS can be selected as well. If HTTPS is used, it is recommended to configure a security certificate in IIS after the wMobile installation. After configuring a certificate to use in IIS, a binding needs to be configured at the root level (Web Site level), to allow HTTPS protocol usage.

Port - The default port is 8081 but it can be set to use any port above 1024 and below 56000. Be sure that the selected port is available.
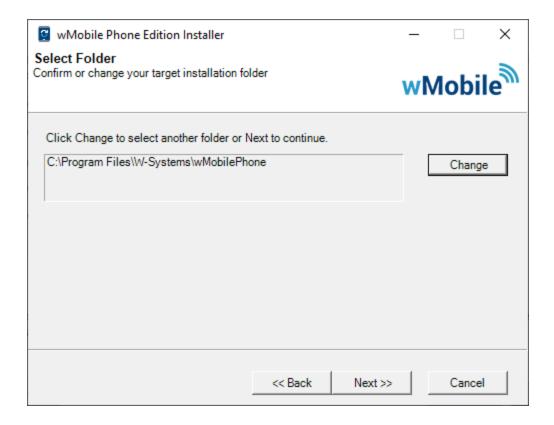
- or -

Select **Skip Web Configuration** if you would like to do this in IIS at a later time. No website, virtual directory, or app pool will be defined.

Click **Next** to continue.

Select **Change** to modify the wMobile installation location. Otherwise, click **Next** to continue.

The installation may take several minutes to complete.
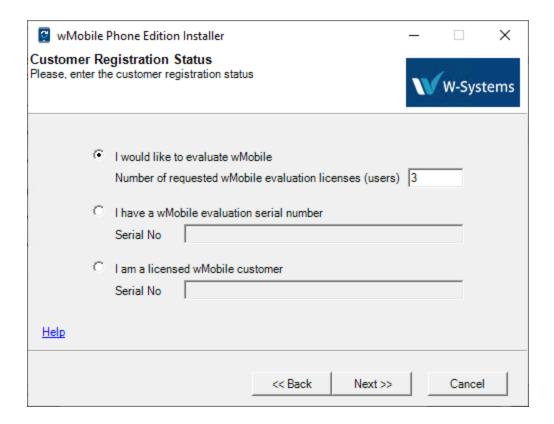
As with the Basic installation, select the appropriate registration status.

- If this an evaluation license, fill in the number of users you'd like to have evaluating wMobile.

- If you have an evaluation serial number, select this option and enter the serial number.

- If you have purchased wMobile then enter the wMobile serial number.

NOTE: If this a re-installation, you would need a new wMobile license. It is not possible to activate an old wMobile license on a new machine. Email goldminesupport@sugarcrm.com for a new license.

Once your selection is made, click **Next** to proceed.

Click **Install** to complete the installation.

Optionally check to **Create a Desktop** shortcut and **Create Start Menu Entries**. Click **Finish**.

2.2.3.3 Installing wMobile Desktop Edition

How to Install wMobile Desktop Edition

1. Welcome to the wMobile Desktop Edition Installer Wizard.

    Click **Next** to continue.

2. Select the Installation Type:

Select the installation type **Basic** or **Advanced**.

The **Basic** option will attempt to auto-detect GoldMine settings. You will still have an opportunity to select the installation path etc.

The **Advanced** option shows the same screens, but does not auto-detect any values. All entries must be made manually.
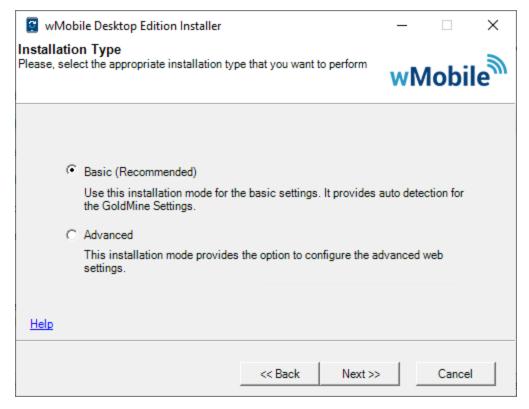
The **Basic** option is recommended. Once you have selected your option, click **Next**.
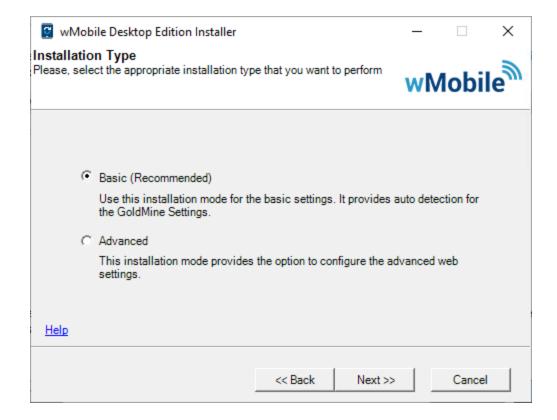
See the sections below based on the installation type you selected.

2.2.3.3.1 Basic

Select the Installation Type: **Basic**

Basic (Recommended): The Basic installation method attempts to auto-detect settings for the installer. This installation type provides the option to review installation options and make configuration changes. Used the Advanced method if you need to create a new website or wish to use the HTTPS protocol.

The installer will attempt to auto-detect the setting from the Remote GoldMine Service settings if installed on the same server.
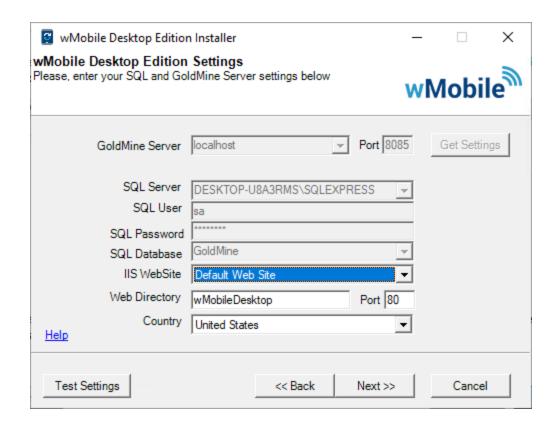
> 💡 **TIP**: Once the GoldMine Server has been filled in, the **Get Settings** button can be used to pull SQL Server configuration information from the Remote GoldMine Service into the wMobile Installer.

Otherwise, enter or adjust the settings manually.

Click **Test Settings** to verify your settings.

Click **Next**.
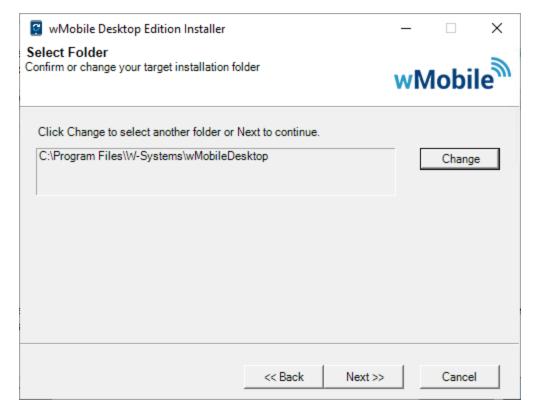
> ⚠️ **IMPORTANT**: A **SQL User** with '**dbo**' rights to the database used by GoldMine must be supplied in the **SQL User** field.
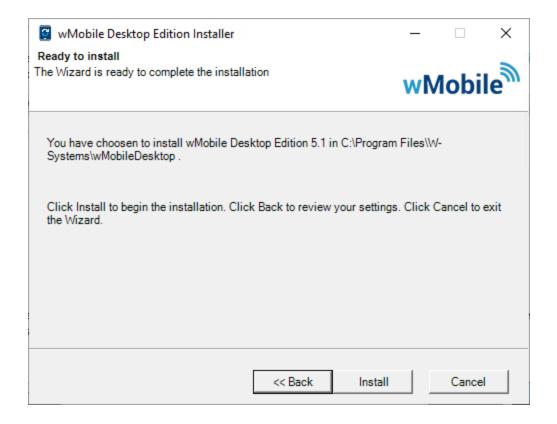
Select the location where you would like wMobileDesktop installed or leave the default path. Click **Next** to continue.

Setup now has enough information to install wMobile.
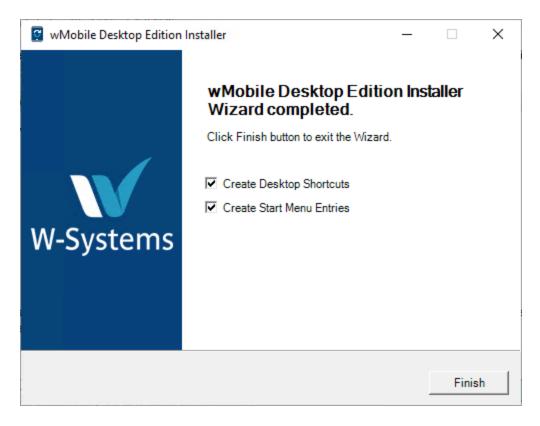
Click **Install** to begin installation.

The installation may take several minutes to complete.

Optionally click the checkboxes to **Create Desktop Shortcuts** and **Create Start Menu Entries**.

Click **Finish** to complete the installation process.

2.2.3.3.2 Advanced

Select the Installation Type: **Advanced**

Advanced: This installation mode provides the option to configure installation location and advanced web settings. This should be used if the application (wMobile) will need to use its own port, application pool, and/or custom settings. This method also provides the option to use the HTTPS protocol.

This installation method also provides the option to skip any web configuration. In this event the web settings would need to be added manually in IIS after the installation. No web site, virtual directory, or app pool would be defined during the installation.

The installer will attempt to auto-detect the SQL server.

💡 **TIP**: Once the GoldMine Server has been filled in, the **Get** button can be used to pull SQL Server configuration information from the Remote GoldMine Service into the wMobile Installer.

Otherwise, enter the appropriate server values for the SQL server where the GoldMine database is hosted.

Click **Test Settings** to verify your settings.

Click **Next**.

⚠ **IMPORTANT**: A **SQL User** with '**dbo**' rights to the database used by GoldMine must be supplied in the **SQL User** field.

Select **Existing Web Site** to use the default web site.
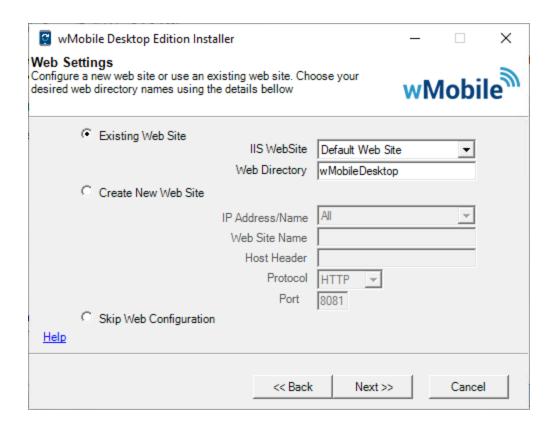
- or - Select **Create New Web Site** and enter the values if you are defining a new web site. The default port is 8081 but can be changed.

Note: Using this method for both wMobile Phone and wMobile Desktop will result in two separate websites. It is possible to [create the website in advance](), to be selected for both wMobile Phone and wMobile Desktop.

IP Address/Name - This can be any machine name or IP address.
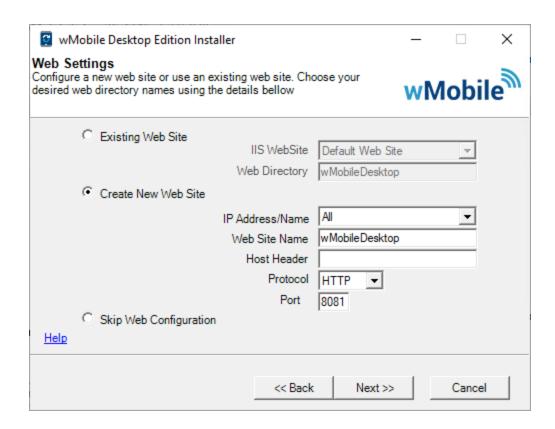
Web Site Name -This can be any name; wMobileDesktop is a logical name.

Host Header - The Host Header is a name for the web site node. wMobileDesktop is a logical name. It is not a mandatory field.

Protocol - HTTP is the default setting. HTTPS can be selected as well. If HTTPS is used, it is recommended to configure a security certificate in IIS after the wMobile installation. After configuring a certificate to use in IIS, a binding needs to be configured at the root level (Web Site level), to allow HTTPS protocol usage.
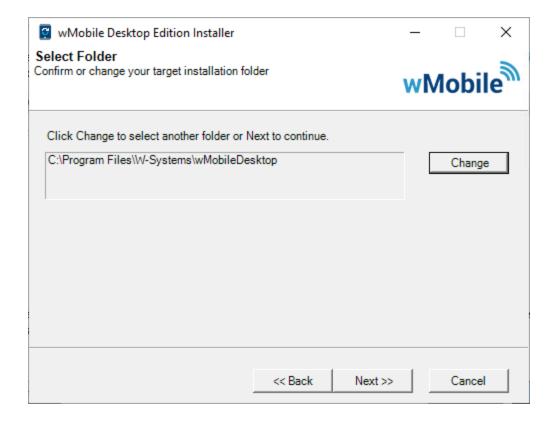
Port - The default port is 8081 but it can be set to use any port above 1024 and below 56000. Be sure that the selected port is available.

- or - click **Skip Web Configuration** if you would like to do this in IIS at a later time. No website, virtual directory, or app pool will be defined.

Click **Next** to continue.

Select **Change** to modify the wMobile installation location. Otherwise, click **Next** to continue.

Click **Install** to proceed.

The installation may take several minutes to complete.

Optionally click the checkboxes to **Create Desktop Shortcuts** and **Create Start Menu Entries**.
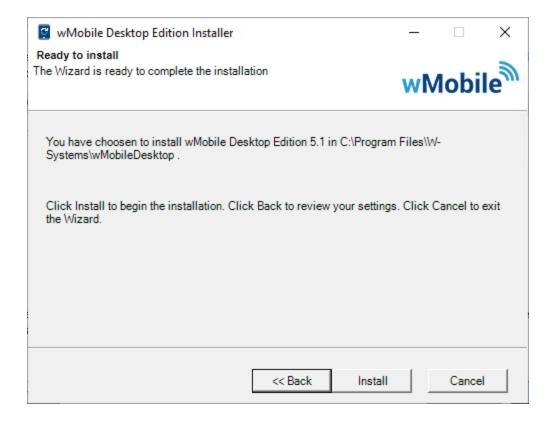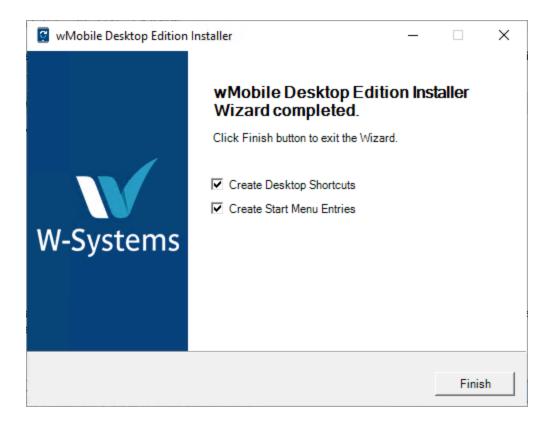
Click **Finish** to complete the installation process.
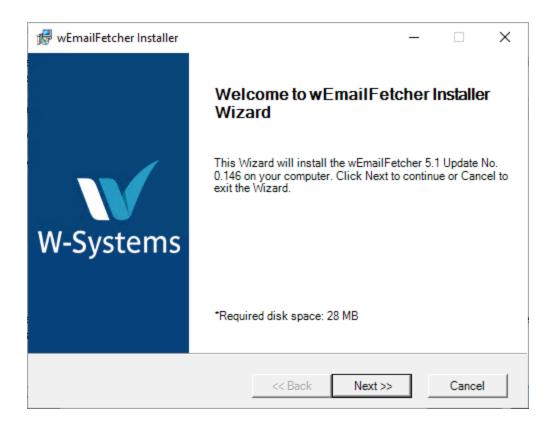
2.2.3.4   Installing the wMobile wEmail Fetcher Service

How to Install the wEmailFetcher

Welcome to the wEmailFetcher Installer Wizard.
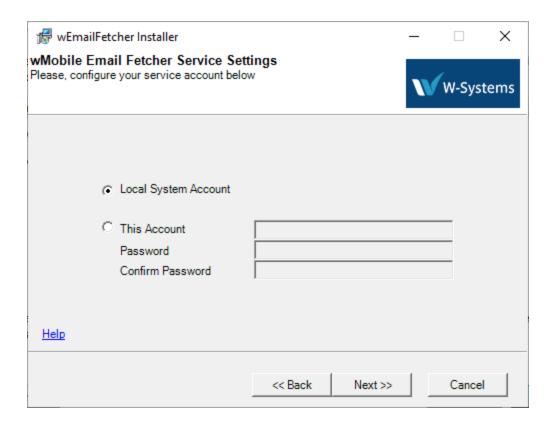
The wMobile E-mail Fetcher service will scan for and download email headers from your POP3 or IMAP server.
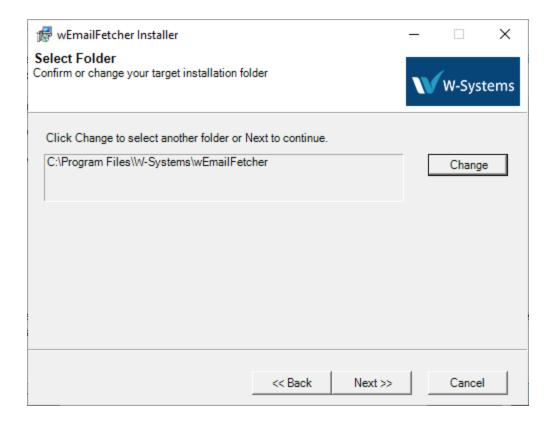
Select the account that will be used to run the Email Fetcher Service. The service can run using the **Local System Account**. Optionally, a specific account may be used instead of the Local System Account by selecting **This Account** and specifying a Windows username and password.

See Also:

📄 How do I create a Service Account?

📄 Configuring Access to Linked Documents
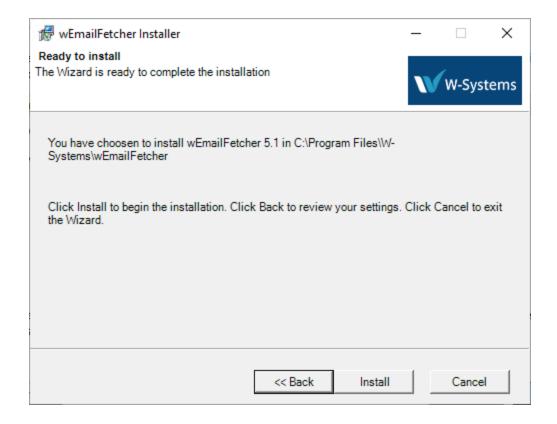
Select the location where you would like the wEmailFetcher installed or leave the default path. Click **Next** to continue.
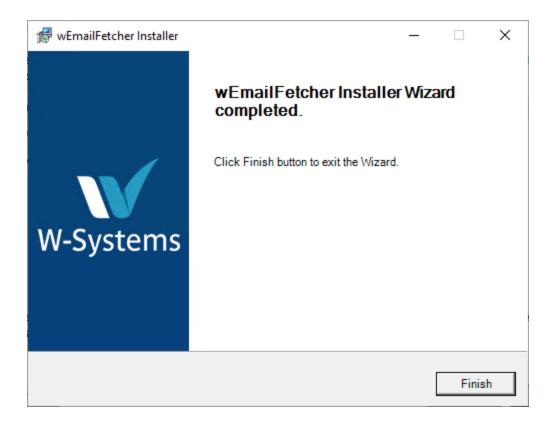
Click **Install** to proceed.

The installation may take several minutes to complete.

Click **Finish** to complete the installation process.
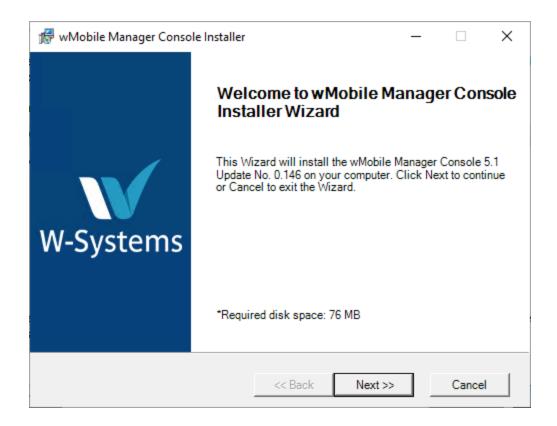
2.2.3.5 Installing the wMobile Manager Console

How to Install the wMobile Manager Console
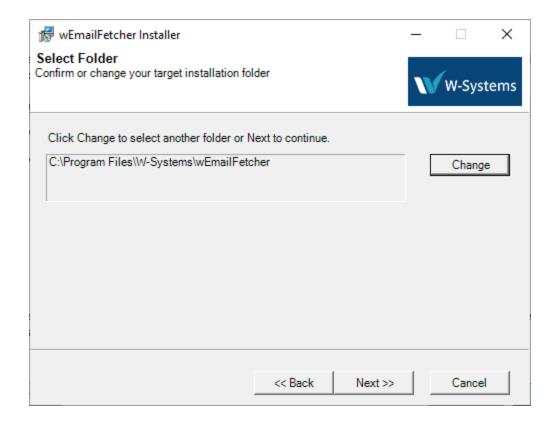
Welcome to the wMobile Manager Console Installer.

Click **Next** to continue.

Select the location where you would like the wMobile Manager Console installed.

Click **Next** to continue.
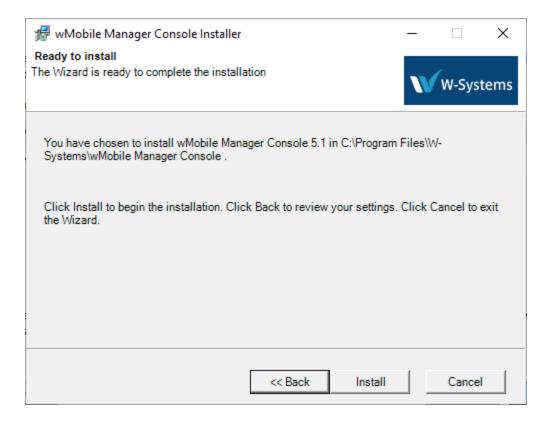
Setup now has enough information to install the wMobile Manager Console.
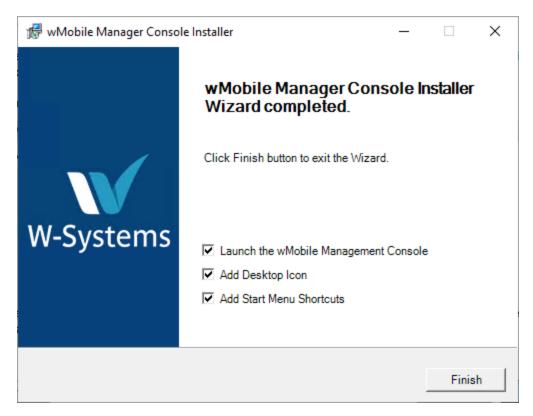
Click **Install** to begin installation.

The installation may take several minutes to complete.

Optionally, click the checkboxes to **Launch wMobile Manager Console**, **Add Desktop Icon**, and the **Add Start Menu Shortcuts**.

Click **Finish** to complete the installation process.
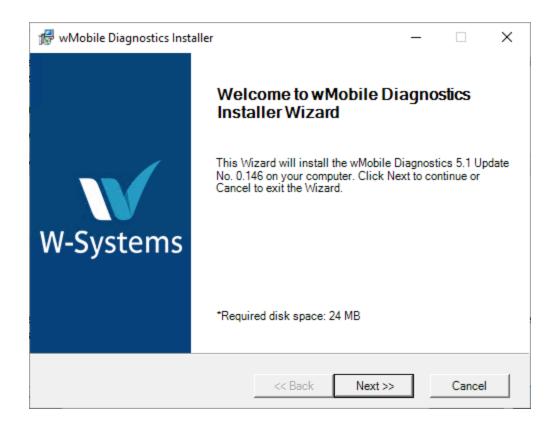
2.2.3.6   Installing the wMobile Diagnostics Tool

How to Install the wMobile Diagnostics Tool

Welcome to the Remote GoldMine Service Setup Wizard.
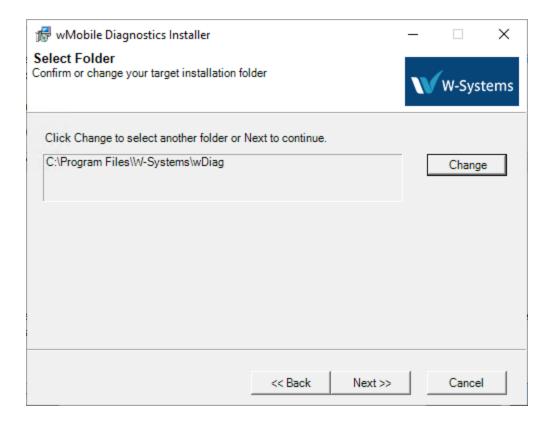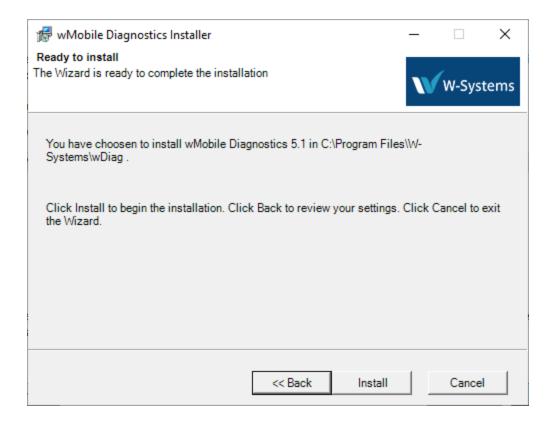
Click **Next** to proceed.

The default location is in C:\Program Files\W-Systems. Click **Change** to specify a different installation path.

Click **Next** to continue.
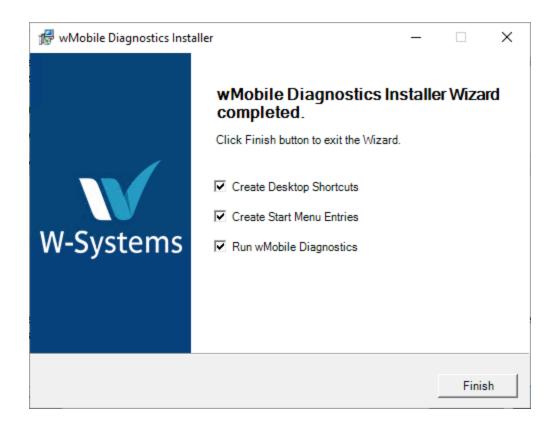
Click **Install** to proceed.
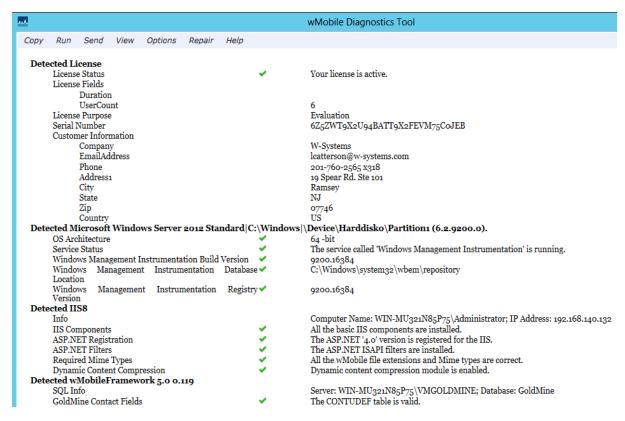
Optionally click the checkboxes to **Create Desktop Shortcuts**, **Create Start Menu Entries**, and **Run wMobile Diagnostics.**

Click **Finish** to complete the installation process.

The wMobile Diagnostics Tool is designed to assist wMobile administrators in identifying configuration problems with an installation or after a problem has occurred. For more information about this tool, please see the wMobile Diagnostics Tool topic for details.

```
wMobile Diagnostics Tool

Copy   Run   Send   View   Options   Repair   Help

Detected License
    License Status                                    ✔    Your license is active.
    License Fields
        Duration
        UserCount                                          6
    License Purpose                                        Evaluation
    Serial Number                                          6Z5ZWT9X2U94BATT9X2FEVM75C0JEB
    Customer Information
        Company                                            W-Systems
        EmailAddress                                       lcatterson@w-systems.com
        Phone                                              201-760-2565 x318
        Address1                                           19 Spear Rd. Ste 101
        City                                               Ramsey
        State                                              NJ
        Zip                                                07746
        Country                                            US
Detected Microsoft Windows Server 2012 Standard|C:\Windows|\Device\Harddisk0\Partition1 (6.2.9200.0).
    OS Architecture                                   ✔    64 -bit
    Service Status                                    ✔    The service called 'Windows Management Instrumentation' is running.
    Windows Management Instrumentation Build Version  ✔    9200.16384
    Windows  Management  Instrumentation  Database ✔       C:\Windows\system32\wbem\repository
    Location
    Windows  Management  Instrumentation  Registry ✔       9200.16384
    Version
Detected IIS8
    Info                                                   Computer Name: WIN-MU321N85P75\Administrator; IP Address: 192.168.140.132
    IIS Components                                    ✔    All the basic IIS components are installed.
    ASP.NET Registration                             ✔    The ASP.NET '4.0' version is registered for the IIS.
    ASP.NET Filters                                  ✔    The ASP.NET ISAPI filters are installed.
    Required Mime Types                              ✔    All the wMobile file extensions and Mime types are correct.
    Dynamic Content Compression                      ✔    Dynamic content compression module is enabled.
Detected wMobileFramework 5.0 0.119
    SQL Info                                               Server: WIN-MU321N85P75\VMGOLDMINE; Database: GoldMine
    GoldMine Contact Fields                          ✔    The CONTUDEF table is valid.
```

2.2.3.7   Installing the Crystal Reports Runtime Engine
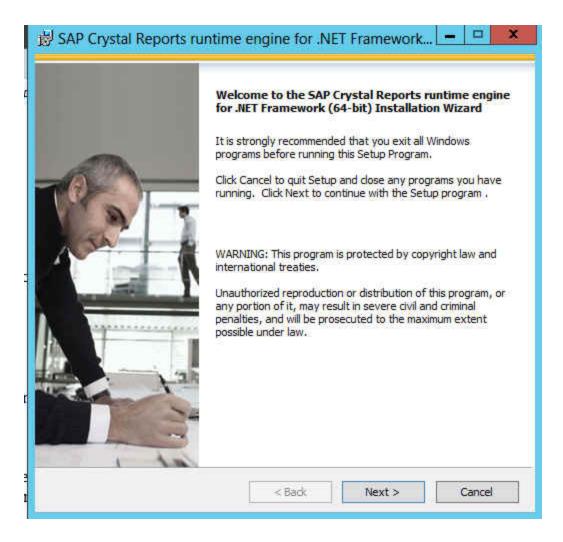
How to Install the Crystal Reports Runtime files

Welcome to the Crystal Reports runtime engine installation Wizard.
(**Note**: This component only needs to be installed if users will be running Crystal Reports from wMobile.)
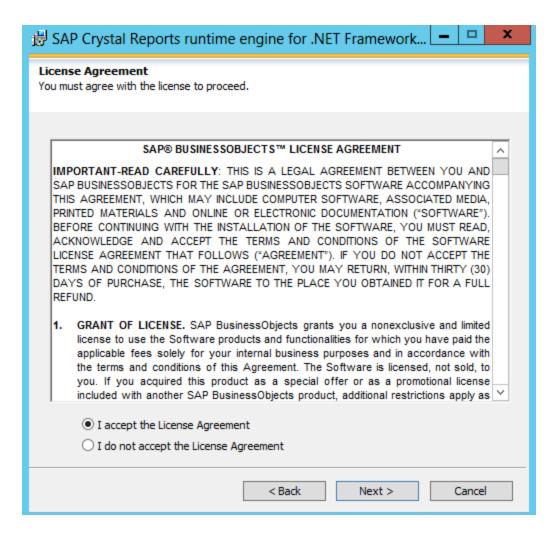
Click **Next** to proceed.
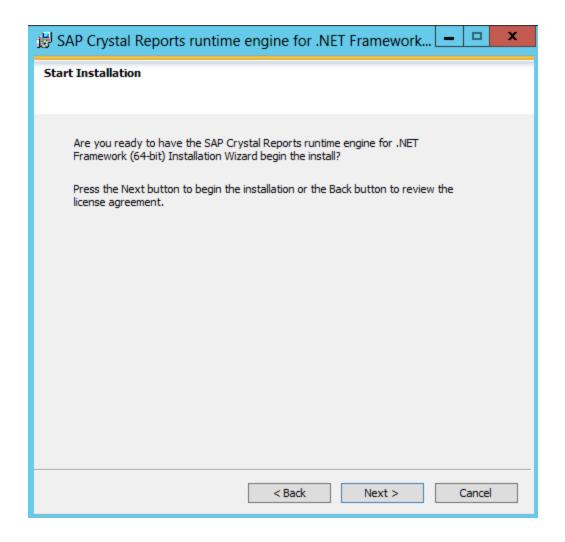
NOTE: The installer will download either the 32-bit or 64-bit runtimes as required.
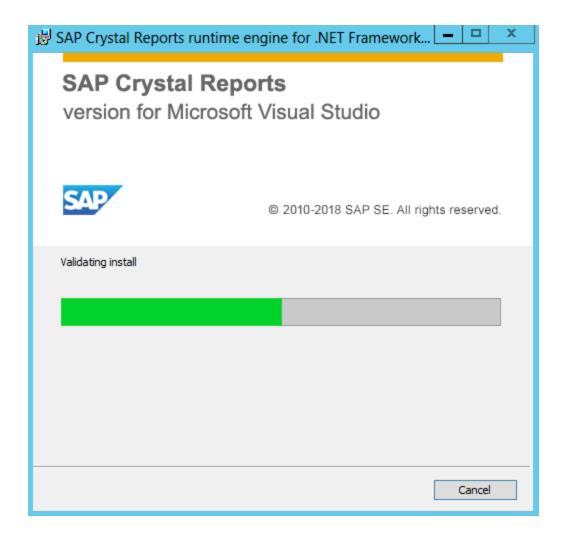
Review the License Agreement and click **I Accept the License Agreement** and click **Next** to proceed.
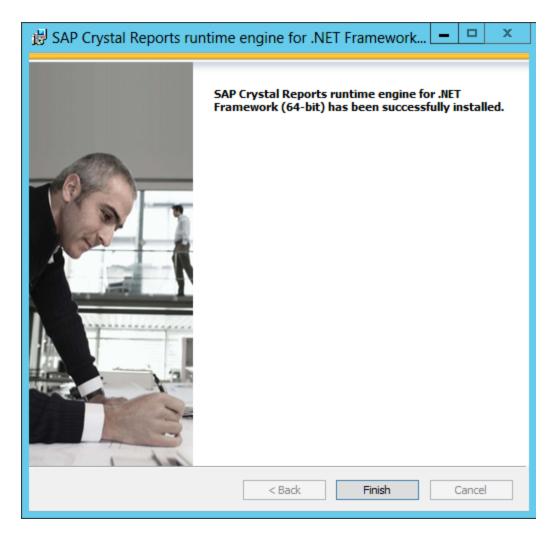
Click **Next** to install.

The installation may take several minutes to complete.
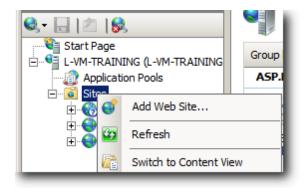
Click **Finish** to complete the installation process.
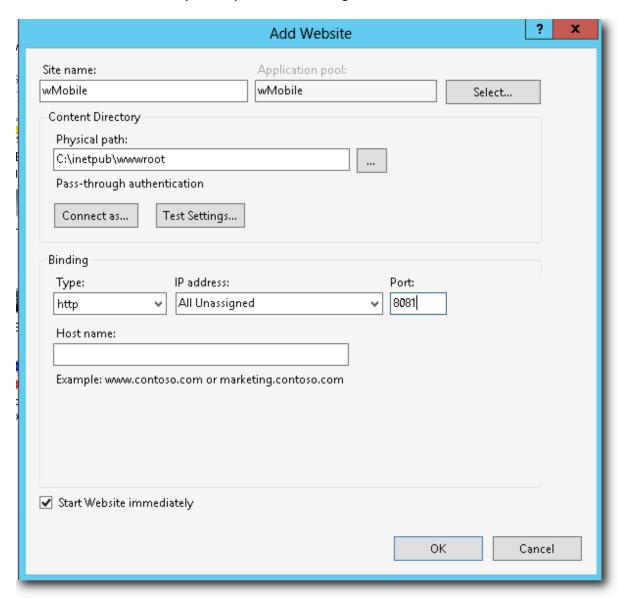
2.2.4 Creating a New Web Site in IIS

Sometimes there are existing websites or restrictions on the Default Web Site (such as on SBS) when it will be necessary or desired to create a separate web site.
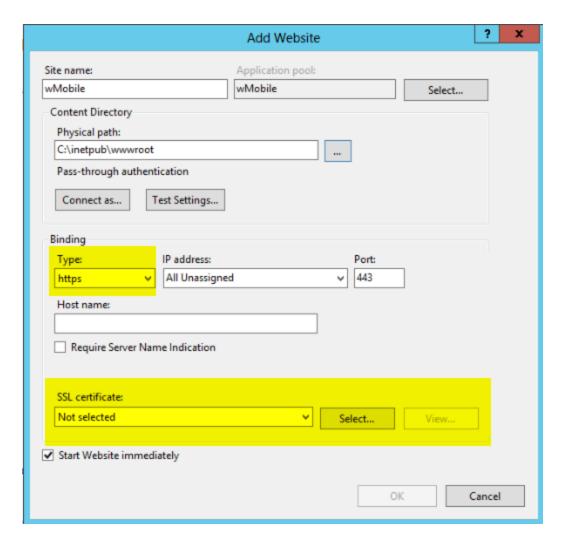
In IIS, right click on Sites and select **Add Website**.

Add the site name such as wMobile. The physical path should be C:\inetpub\wwwroot because the aspnet_client and other resources are here that need to be accessed. Leave the host name blank. A specific port can be assigned, such as 8081.
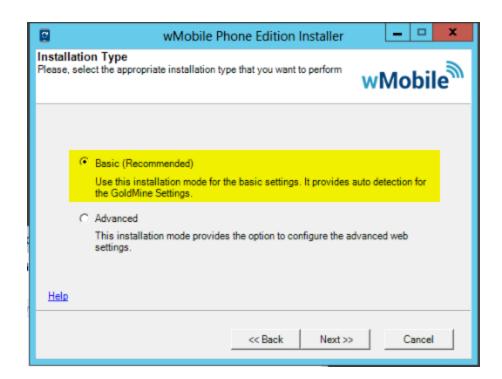
The binding type could be changed to https. In this case, an additional field will become available to select an SSL certificate. An SSL certificate is required for using the https protocol. The certificate should be installed in IIS prior to installing wMobile so that it is available for selection.
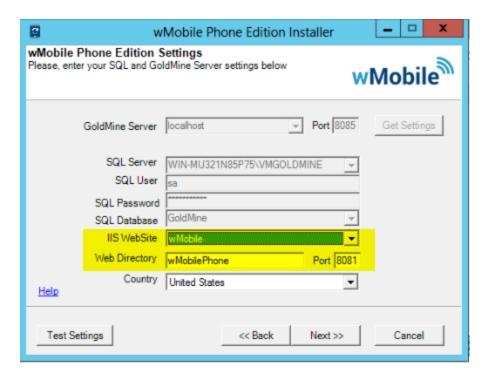
A host name can be added if wMobile will be accessed using a domain name. If wMobile will be accessed using an IP address in the web address, leave the Host Name blank.

Once a website is created, it can be used in the wMobile installation process. The Basic installation method can be used.

In the web page settings, select the website created previously. The installer will automatically create the Web Directory, and used the port specified when the web site was created.

There will be 2 virtual directories for Phone and Desktop, that will use the same port. (Using the Advanced installer to create a website is also an option. However, using that

method, two websites would be created, one for wMobile Phone and another for wMobile Desktop. Each site would require a separate port.)

The internal addresses will look like the following, specifying the port, using the port defined when the website was created. The external addresses would be the same, but substituting the external static IP address or domain name and the proper port.

http://localhost:8081/wMobilePhone
http://localhost:8081/wMobileDesktop

2.3   Post-Installation Checklist

The following post-installation checklist is designed to help you configure wMobile. If you are unsure about anything on the list, the links under the "**See Also**" section for each item will help you check, complete, or understand any requirement on the list.

❑ **Activate Your License**
If you have purchased the software or were supplied with a serial number to demo wMobile, Product Activation will unlock the time and user limits that come pre-installed with wMobile.

See Also:

- Activating Your License

❑ **Test wMobile using the wMobile Diagnostics Tool**

If you did not run this tool during the wMobile installation/upgrade/update, it is highly recommended.For instructions and details, see the [wMobile Diagnostics Tool](#) topic.

See Also:

- [wMobile Diagnostics Tool](#)

❏ **Configure User Access**

Configure which GoldMine users will have access to wMobile.

See Also:

- [Configuring Users](#) and [Configuring User Profiles](#)

❏ **Configure wMobile Drive Mapping for Email Attachments and Linked Documents**

Configure wMobile to find attachments and linked documents that are linked to a mapped drive letter.

See Also:

- [Virtual File System Settings](#)
- [Virtual File System Commands](#)

❏ **Customizing the Main Menu**

Alter the layout and content of the [Home Menu](#) to streamline the user experience.

❏ **Configure Global wMobile Settings**

Enable additional functionality or customize wMobile for your region or specific requirements.

See Also:

- Learn about: [Global (System Settings)](#) versus [Default User Options](#)
- Setting the [Default Time and Date Formats](#)

2.3.1   Activating Your License
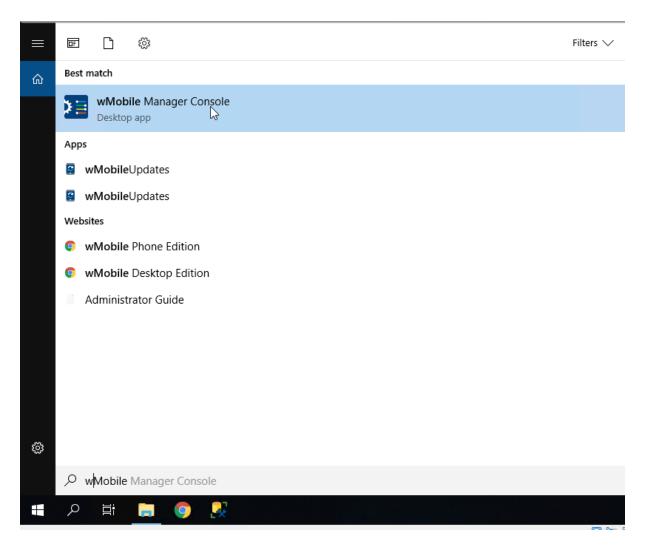
How to Activate Your wMobile License

The wMobile installer provides the opportunity to use an evaluation license for 30 days for new customers. After purchase, a new license will be provided by SugarCRM and can be activated using the steps below. These same steps can be used any time a new license is provided (such as for server migrations or changes in license count).

> 🗒 **NOTE**: This activation process requires an Internet connection.

To activate wMobile follow these steps:
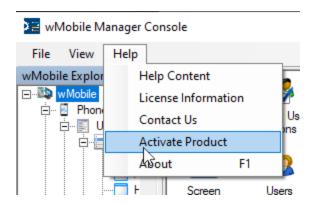
1. From the Web server where wMobile is installed, start the <u>wMobile Manager Console</u>.

2. From the main menu select **Help > Activate Product** to display the **wMobile Licensing Wizard**.
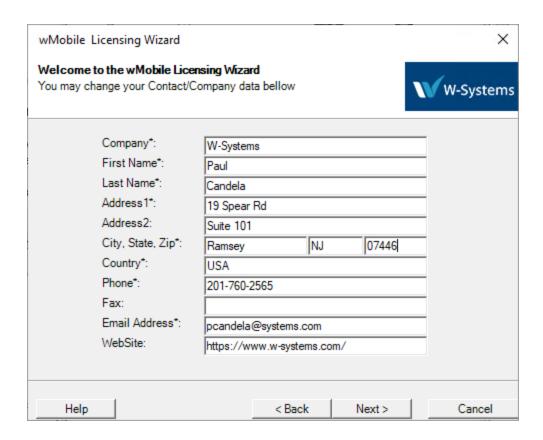
Click **Next**.

NOTE: If this is an evaluation license, the first screen in the **wMobile Licensing Wizard** will display the number of days remaining before a production wMobile license will need to be activated. You can cancel activation at any time by clicking **Activate Later**.
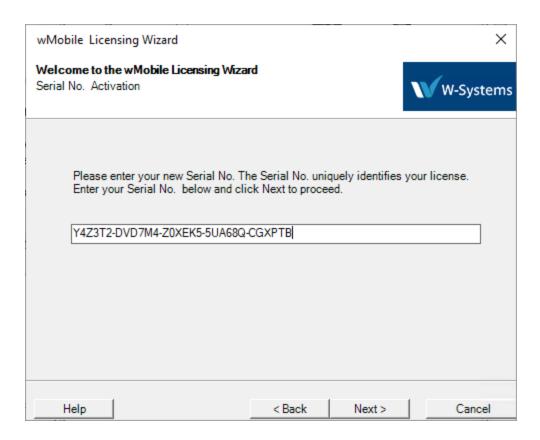
3. Enter your Contact/Company information into the various fields.
Click **Next**.
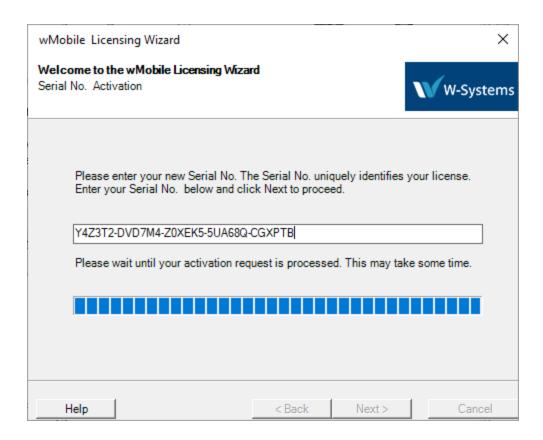
NOTE: Required fields are designated with asterisks (*).
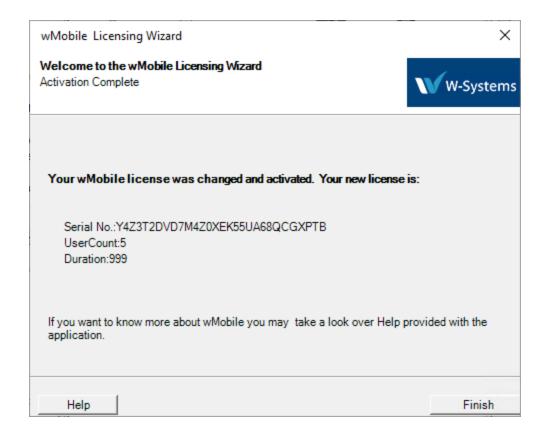
4. Enter the **Serial Number** provided.

Click **Next**.

5. The system will validate the **Serial Number** you've entered and activate your copy of wMobile.

6. You will see a message stating that the product has been validated after completion. Click **Finish**.

3   Upgrading wMobile

Customers with current wMobile maintenance may upgrade wMobile during their maintenance period. There will usually be a desktop shortcut on the server which can be used to start the wMobile update. If this is not immediately apparent, the current wMobile installer/updater can be accessed from this link.

> ⚠ **PLEASE READ BEFORE UPGRADING:**
>
> You will need to execute the **wMobile Download Manager** on any server(s) that already have wMobile components installed on them.
>
> For example, if you have a split-server installation, you must first upgrade the Remote GoldMine Service on the GoldMine server before upgrading wMobile on the wMobile server. If you are unsure what type of installation you have, see the Installation Scenarios for wMobile topic for information.

wMobile Upgrade Wizard
Which wMobile Versions Can I Upgrade

3.1   wMobile Upgrade Wizard
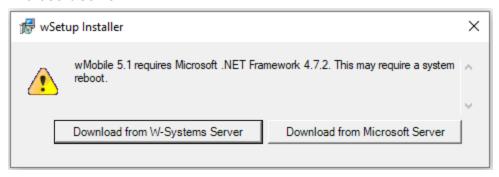
The wMobile installer checks the registry for installed wMobile components. Based on what is detected, wMobile will use the appropriate installer/upgrader/updater for each component.

* The **installer** will be launched if a component is not currently installed.
* The **updater** will be launched if a previous build of the current version is installed.
* The **upgrader** will be launched if a previous wMobile version is installed.

The wSetup.exe file can be run directly or downloaded to the server, as desired.

Do you want to run or save **wSetup.exe** (757 KB) from **download.w-systems.com**?

This type of file could harm your computer.   Run   Save ▾

Save
Save as
Save and run
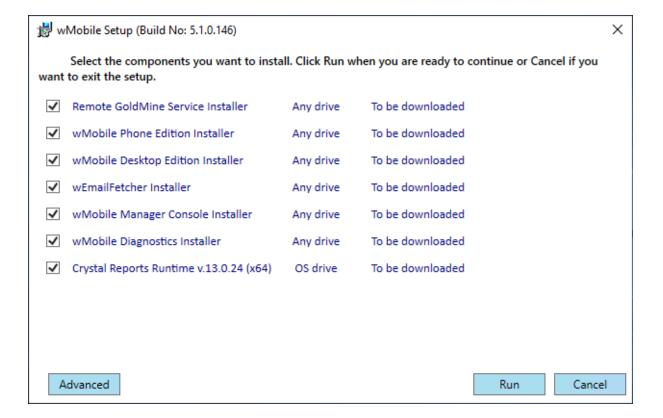
wMobile 5.1 has a prerequisite for .NET Framework v4.7.2 (or higher). If the installer detects that this is not installed, it will present options to download from the wMobile or Microsoft Server:

A .NET Framework update will not be required for every wMobile update. Please refer to the topic on installing .NET Framework and return to this topic when that component is installed.
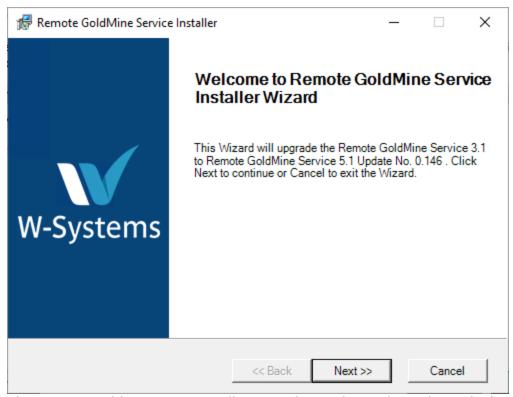
All the components installed on the server should be listed. (When updating from a previous version of wMobile 5.x, only the wMobile component updates will be listed for installation. .NET Framework and Crystal Report Runtime Engine updates are not required on regular updates.)
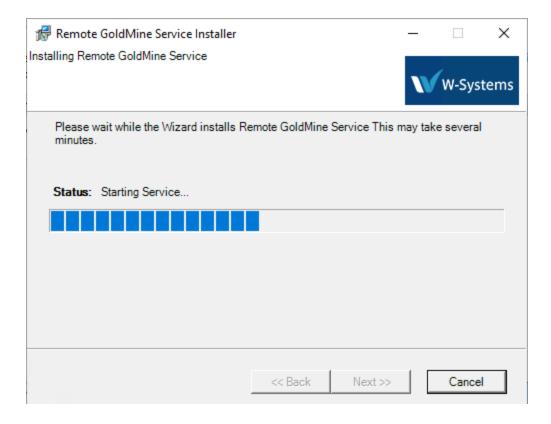
> 🗐 **NOTE**: If you have a split-install, you will need to execute the **wMobile Download Manager** on each server. Install only the Remote GoldMine Service on the server where it is currently installed. Install all other components on the IIS server. *The Remote GoldMine Service should only be installed ONCE.* If you are unsure what type of installation you have, see the [Installation Scenarios for wMobile](#) topic for information. The Remote GoldMine Service should be the first component to be updated.

Click **Run** to begin updating the components. The installer will begin downloading the component installers:
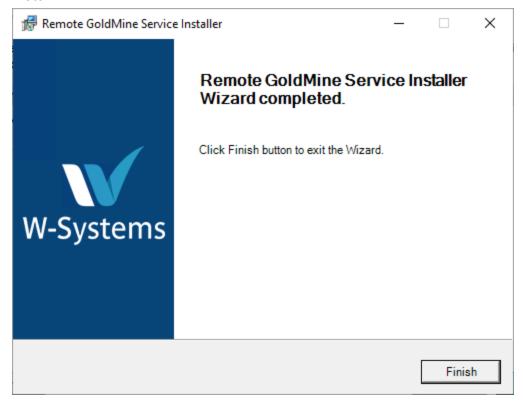
Click **Next** through the update wizard.
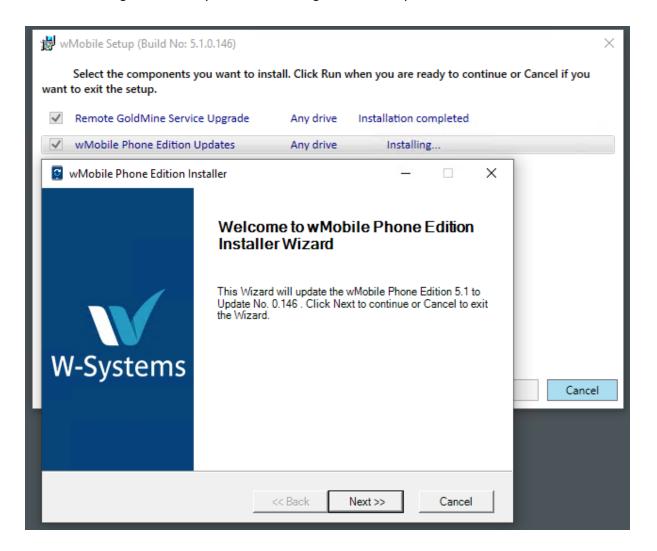
The Remote GoldMine Service will stop and start during the update, which would cause any logged in users to be kicked back to the login page. Updates should be done outside of business hours, or warn users of scheduled maintenance in advance.
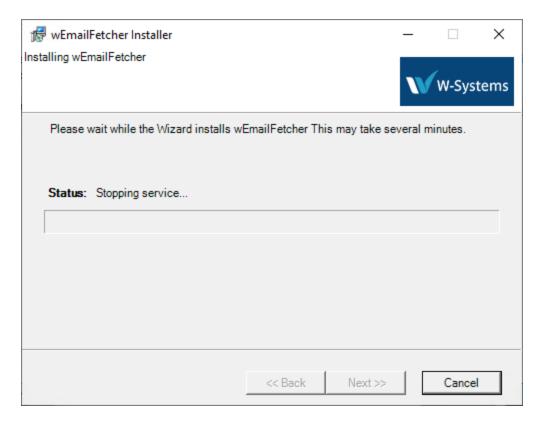
Click **Finish** to complete the component install and move on to the next component install.

Proceed through each component, following the wizard updaters.

The wMobile Email Fetcher Service will also stop and start during that component update.

wMobile Diagnostic will run after that component is updated. Review the diagnostic summary for any items marked in red.

If you encounter any problems, please email goldminesupport@sugarcrm.com for assistance.

3.2   Which wMobile Versions Can I Upgrade

The wMobile 5.1 Download Manager will upgrade from wMobile 3.0, 3.1, 4.0, 4.1, 5.0 installations only. Older version upgrades are no longer available.

⚠ **IMPORTANT**:

- If you are upgrading wMobile 1.8, 1.9, 2.0 or 2.1 please contact your reseller or goldminesupport@sugarcrm.com for assistance.

---

4   wMobile Administration

Different levels of administration exist in wMobile. System wide settings for wMobile are available to administrators having access to the wMobile server while the more "personal" user settings are accessible by the users themselves directly within the Phone and Desktop edition interfaces.

System Level Administration

For System Administrators:
Administration for wMobile is performed using the wMobile Manager Console. This tool is designed for system administrators needing to make system wide changes to wMobile affecting all users. This includes setting up and maintaining user access, creating and editing email accounts, license management, setting various global settings, and much more. Please see the other related topics starting with the wMobile Manager Console itself.

User Level Administration

For End Users:
Users have the ability to make changes to their personal wMobile experience by using My Preferences in the Phone Edition or by configuring the User Options in the Desktop Edition.

4.1   wMobile Manager Console

Administration and configuration of wMobile is done using the **wMobile Manager Console**. This application is installed on the wMobile server and can be accessed from the server's Start menu. To run the wMobile Manager Console, select **Start > All Programs > W-Systems > wMobile Manager Console > wMobile Manager Console**.
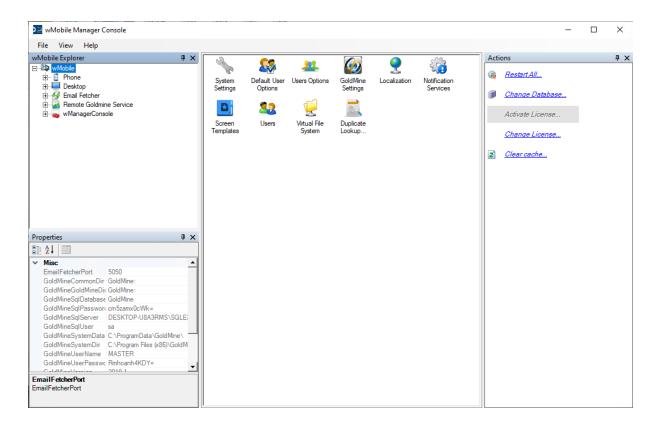
Logging into wMobile Manager Console:
By default, login credentials are not required for access to wMobile Manager Console. However, if a login requirement is desired, a GoldMine user's credentials may be used. To configure wMobile Manager Console to require a login, please see: Configure wMobile Manager Console Login Requirement

The **wMobile Manager Console** application interface window is divided into separate tool windows:

- **wMobile Explorer**: A hierarchical user interface used to view and manage the objects in wMobile.
- **Properties**: The properties of the object selected (may be editable or read-only at times based on context).
- **Main**: This is the center window/work area. Based on context, this area may display grids, logs, configuration screens, or other interfaces.
- **Actions**: This window displays the "action" commands available for the object being configured.
- **Messages**: In some contexts, messages may appear in this area (tabbed window at bottom and may be pinned open if desired).

The wMobile Manager Console allows administrators to (this is a partial list; please see table of contents):

- [Configure: wMobile System Setting](#) (Global/System Wide Settings)
- [Configure: Email Accounts](#)
- [Configure: Maximum login failures allowed before an account is locked](#)
- [Configure: Change the default automatic logoff time (default timeout)](#)

- [Configure: Configure Access to Email Attachments and Linked Documents](#)
- [Configure: Enable / Disable wMobile Manager Console Login Requirement](#)
- [Configure: Customizing Contact Screens](#)
- [Configure: Logging in wMobile Manager Console](#)
- [Customizing wMobile Desktop Edition](#)
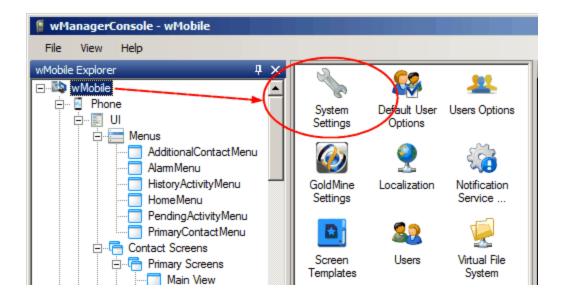
4.2   Configuring wMobile System Settings

Configuring wMobile System Settings

System wide settings are configured from within the **wMobile Manager Console**.

For information regarding default user options, please see: [Configuring wMobile User Options](#)

The **System Settings** are accessed by selecting the **wMobile** node in the **wMobile Explorer** window and then double-clicking the **System Settings** icon.

To the right of the **wMobile Explorer** window is a tree list containing nodes. Selecting a node in the tree list will allow you to edit its associated properties in the **Properties** window on the right.

🐤 **CONFIGURATION NOTE**:
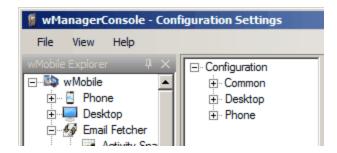
There are many configuration settings available that are not described here in detail. To get descriptions for a specific settings, click on a property name and its description will appear at the bottom of the dialog.

Configuration
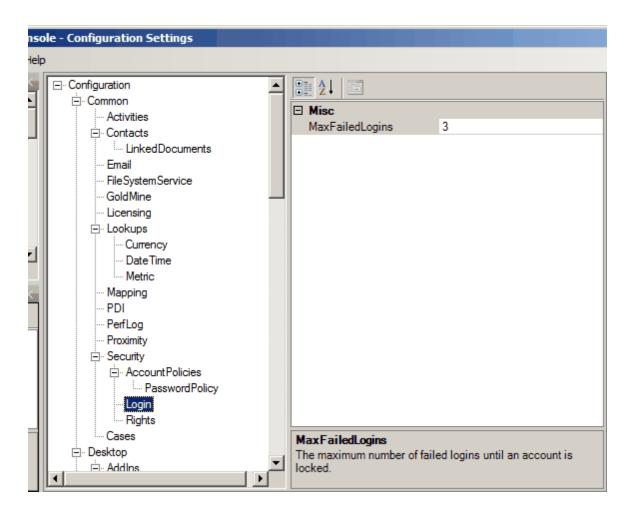
The **Configuration** node is at the top of the tree list and has the following sub-nodes:

- **Common**: Contains settings that are common throughout wMobile.
- **Desktop**: Contains settings that are specific to the **wMobile Desktop** edition.
- **Phone**: Contains settings that are specific to the **wMobile Phone** edition.
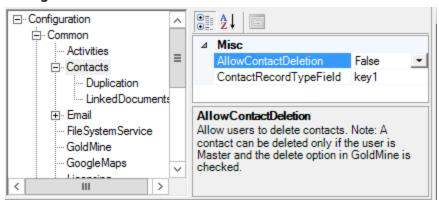
Example of **System Settings** in wMobile Manager Console.

Here are some common settings that can be updated in System Settings.
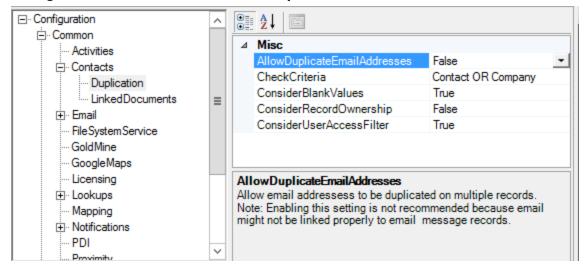
Configuration > Common > Contacts >

AllowContactDeletion – This setting controls whether contacts can be deleted in wMobile. This is dependent upon GoldMine user settings as well.

ContactRecordTypeField – This should indicate which field in GoldMine is used to store the Record Type. Typically, this is the Key1 field, unless it's been changed or customized.
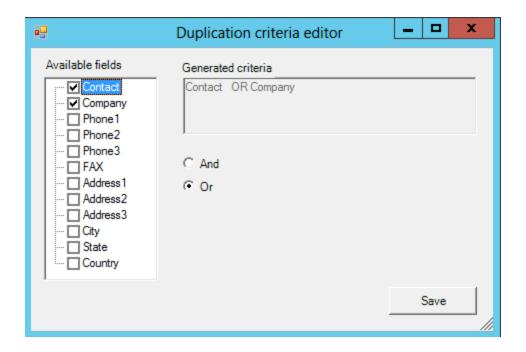
Configuration > Common > Contacts > Duplication

AllowDuplicateEmailAddresses – This setting controls whether duplicate email addresses can be entered into wMobile. This is not recommended because email messages are linked based on a matching email address.

CheckCriteria – This setting is used to determine which field(s) will be used to detect potential duplicate records. Click on the 3 dots (ellipsis) at the end of the line to launch the Duplication criteria editor.

Options here are greater than in GoldMine itself (which includes Company and Contact name, Phone number and Email address). In wMobile, you can select any field, including custom fields, as potential duplicate detection criteria. If selecting more than one field, use **And** if both (or all) fields should be used to identify potential duplicates. Use **Or** if only one of the selected fields needs to match to be considered a duplicate.

The desired setting will be dependent on how your GoldMine is used. Some companies have a "company-centric" database where each company they work with has a record in GoldMine, and all the contacts they work with are entered as additional contacts on this one record. Some companies have a "contact-centric" database where they have a separate GoldMine record for each contact they work with. In the latter case, you would not want to be detecting duplicates based on Company, because you'd expect to have multiple records with the same company name. Another consideration is whether you have individual people as customers, where there's no company name. Detecting duplicates based on Company wouldn't be very helpful in that case. You'd want to match on Contact, or perhaps Company AND contact, so both would have to match for the new contact to be detected as a potential duplicate.

ConsiderBlankValues – This can be set as True or False. The desired setting will be dependent on how contacts are added in GoldMine. As in the example above, if you have many records where there's no company name, then you'd want to set this as True to ignore the blank company field.

ConsiderRecordOwnership – This can be set as True or False. If set to True it will not take record ownership/curtaining into account on evaluating potential duplicates. So if a duplicate exists in the database, a user would be notified of a potential duplicate, even if he or she doesn't have access to see it. If set to False, then record ownership/curtaining will not be ignored. If a user adds a record that already exists, he or she will not get any warning of a potential duplicate.
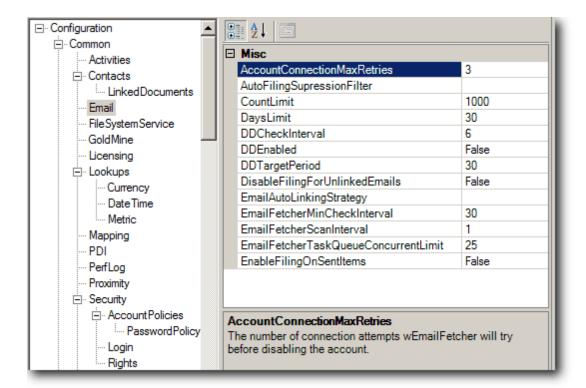
ConsiderUserAccessContactFilter – This can be set as True or False. If set to True it will NOT take record a User's record access filter into account on evaluating potential duplicates. So if a duplicate exists in the database, a user would be notified of a potential duplicate, even if he or she doesn't have access to see it. If set to False, then record ownership/curtaining will not be ignored. If a user adds a record that already exists, he or she will not get any warning of a potential duplicate.

Configuration > Common > Contacts > LinkedDocuments

LinkedDocPath: This value represents a mapped drive or network UNC path that the Remote GoldMine Service can access. This path is where the linked documents will be saved.

Configuration > Common > Email

AccountConnectionMaxRetries: This is the maximum number of times the wMobile Email Fetcher Service will try to connect to an email account. The default is 3, but can be increased. After this number of attempts, the account will be disabled for auto-checking to preserve resources on the server.

AutoFilingSupressionFilter: This can be manually entered values, such as specific email addresses. Email from an email address(es) would not be linked and auto-filed in History..

This option allows you to exclude email from auto-filing. For example, a specific email address or domain could be excluded. Add entries to this field to be excluded. Separate each of the filter values with a semi-colon (;) or a comma (,) character. An asterisk (*) character may be used as a wildcard in order to exclude all email from a specific domain.

Filter examples:

user1@baddomain.com; user2@baddomain.com (these two email addresses will not be auto-filed).

*.baddomain.com (all email addresses from "baddomain.com" will not be auto-filed).

CountLimit: The count of emails that will be downloaded from the user's server or ISP mailbox. The default is 1,000. The most recent emails are downloaded.

DaysLimit: This setting determines how many days back the fetcher service will go back to download email from the user's server or ISP mailbox. In cases where an administrator is trying to auto-file older email, this number can be increased.

DDCheckInterval: This setting is used if DDEnabled is set to True, and determines how often (in hours) the fetcher will check and de-duplicate filed email.

DDEnabled: This setting determines whether the de-duplication service is enabled. Some customers have the email accounts set to auto-file certain email folders (such as the Inbox and Sent items folders). Auto-filing is mainly used by customers that don't use GoldMine or wMobile as their email client. They might use Outlook, Zimbra, Lotus Notes, MacMail, etc. However, sometimes, a customer will use multiple email clients and doesn't want to miss linking important emails. In this case, the de-duplication service would review emails for duplicates and remove them.

DDTargetPeriod: if DDEnabled is set to True, this setting determines how many days back will be checked for duplicates. The default is 30 days.

DisableFilingForUnlinkedEmails: This setting controls whether the menu options "File" and "Copy to GoldMine Inbox" are visible for unlinked emails.

EmailFetcherMinCheckInterval: This setting determines how often the email fetcher service will go out to the users' server or ISP mailbox to check for new messages. The default is 30 minutes, but can be decreased. It's not recommended to set this lower than 5 minutes to ensure a fetch is completed before the next attempt.

NOTE:
When auto checking is enabled, wMobile will make a specified number of attempts to connect to the email server to perform a sync. If the number of attempts exceeds the value set in the **AccountConnectionMaxRetries** property, wMobile will disable the auto checking by add a "tick" to the **Disable Auto Checking** checkbox for the email account trying to sync.

Example: Using default settings, the email Fetcher will attempt to connect to an email account 3 times, every 30 minutes. If it fails to connect those 3 times, over a total of 90

minutes, the auto-retrieval will be disabled. This is to avoid using up expensive system resources for failed connections.

For information on re-enabling auto-retrieval, see the topic on [Troubleshooting Email Accounts](#).

EmailFetcherScanInterval: The default value is 1, so every minute the fetcher service will check the email accounts table and check if it's time to check each email account.

EmailFetcherTaskQueueConcurrentLimit: this determines the number of tasks that the fetcher will perform concurrently. The default is 25. Each request to check an email account is counted as a task. (by a user within the wMobile application or automatically by the fetcher service). If there are many email accounts, some tasks will be queued. When the number of open tasks drops below 25, queued tasks would then be processed accordingly.

EnableFilingOnSentItems: The default is False. This setting controls whether "File" option is available on Sent email. In most cases where email is sent from wMobile or GoldMine, the email is already filed. This option would pertain to customers using another email client to send email.

Configuration > Common > GoldMine
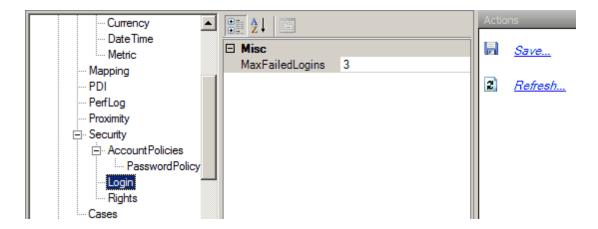
EnableMgrConsoleGMLogin: Use to disable the GoldMine user login requirement for the wMobile Management Console. When there is no GoldMine login requirement, it won't use a GoldMine license when opened.

UseGoldMineCurtaining: This controls whether wMobile will use GoldMine's record curtaining rules.

Configuration > Common > PDI
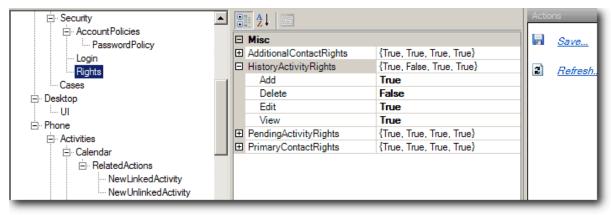
DisableAddToLocal: Use to disable/enable users from being able to add data into their device's local address book/calendar. Settings: False = enabled (allows users to use feature); True = disabled.

Configuration > Common > Security > Login

Max Failed Logins: The maximum number of failed login attempts before an account is locked.

Tree Navigation: Configuration > Common > Security > Rights
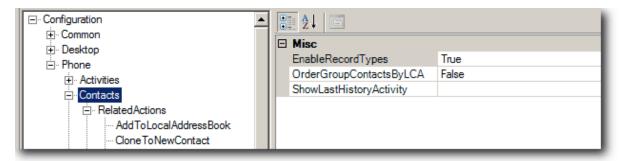
AdditionalContactRights: Global System Rights for Additional Contacts.
HistoryActivityRights: Global System Rights for History Activities.
PendingActivityRights: Global System Rights for Pending Activities.
PrimaryContactRights: Global System Rights for Primary Contacts.

Configuration > Phone > Contacts

EnableRecordTypes: [True | False] Enables the use of Record Types in wMobile Phone Edition.
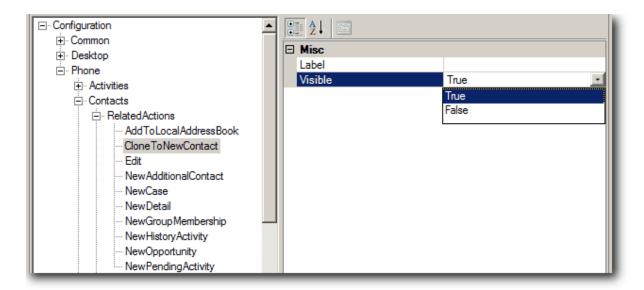
NOTES:

In new installations, this is set by default. Older installations might have this set as False to allow use of custom field view XML files.

Record Typing is automatically enabled in Desktop Edition, there is no configuration setting.
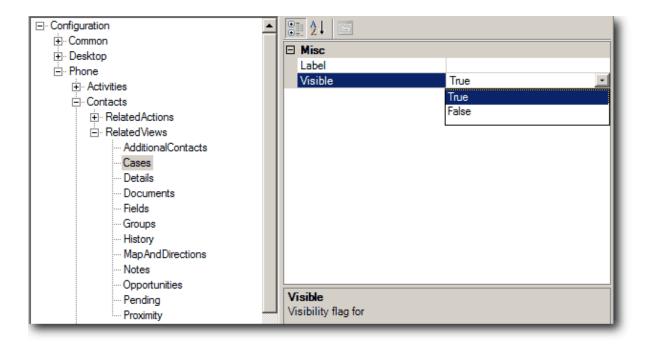
Configuration > Phone > Contacts > Related Actions

Many of these items have settings to control whether they appear in wMobile. The **Visible** status can be changed to **False** to remove them from view.
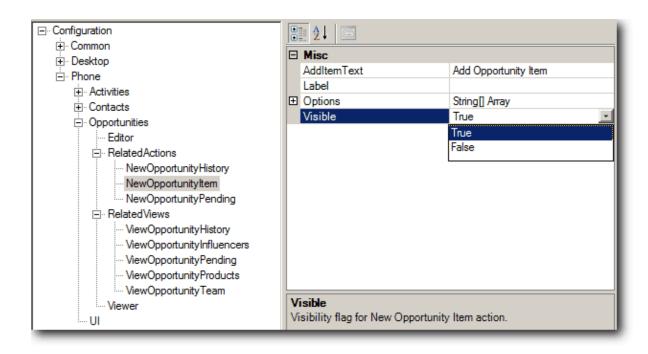
Configuration > Phone > Contacts > Related Views

Many of these items have settings to control whether they appear in wMobile. The **Visible** status can be changed to **False** to remove them from view. For example, f your company does not use GoldMine Cases, that option can be removed from view in wMobile so the menus will be shorter and will require less scrolling.
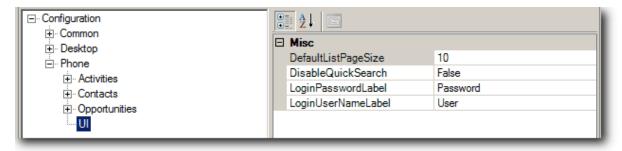
Configuration > Phone > Contacts > Opportunities

Although less commonly used, items can be removed from view in the Opportunities screens by changing the **Visible** setting from **True** to **False**.

Configuration > Phone > UI

- **DefaultListPageSize**: Defines the default number of items for lists.
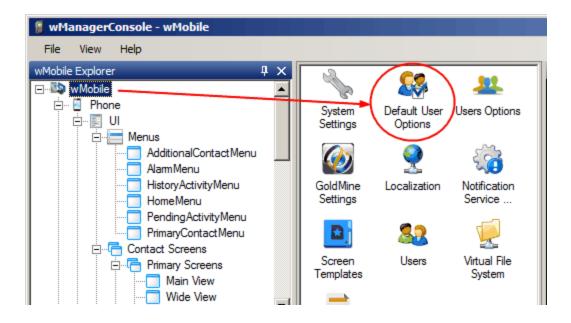
4.3   Configuring wMobile Default User Options

Configuring wMobile User Options

User Options are configured from within the **wMobile Manager Console** and can be used to apply user settings to all users at the same time.

For information regarding System Settings, please see: Configuring wMobile System Settings
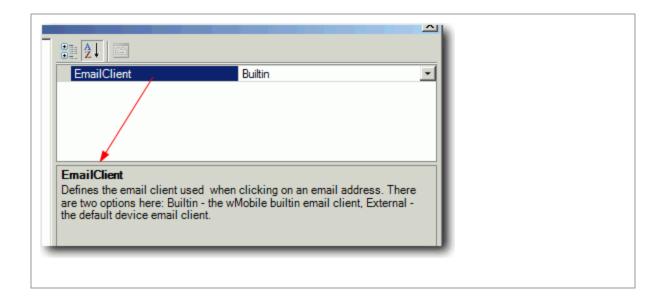
The User Options are accessed by selecting the **wMobile** node in the **wMobile Explorer** window and then double-clicking the **Default User Options** icon.

To the right of the **wMobile Explorer** window is a tree list containing nodes. Selecting a node in the tree list will allow you to edit its associated properties in the **Properties** window on the right.

🐤 **CONFIGURATION NOTE**:

There are many configuration settings available that are not described here in detail. To get descriptions for a specific settings, click on a property name and its description will appear at the bottom of the dialog.
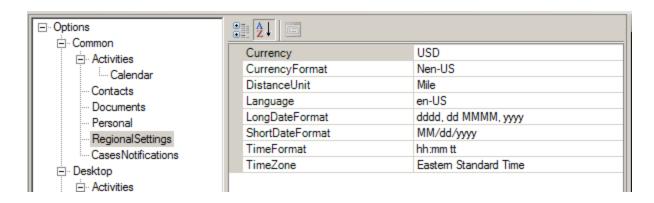
Options
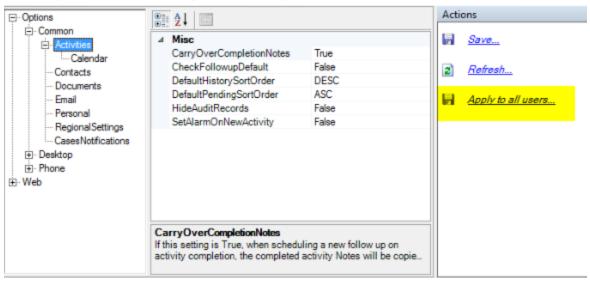
The **Options** node is at the top of the tree list and has the following sub-nodes:

- **Common**: Contains settings that are common throughout wMobile.
- **Desktop**: Contains settings that are specific to the **wMobile Desktop** edition.
- **Phone**: Contains settings that are specific to the **wMobile Phone** edition.

Example of **User Options** in wMobile Manager Console.

When settings have been configured that should be globally applied, use the **Apply to All Users** option in the Actions pane on the right.
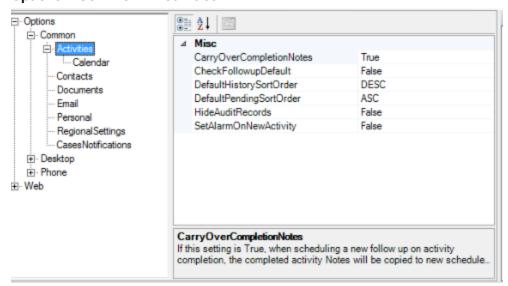
4.3.1   Default User Options - Common

Common settings are common to both wMobile Phone and Desktop Editions. The most commonly used and edited settings are below. Users can override the default settings by changing their individual settings in <u>User Options</u> in Desktop Edition or <u>My Preferences</u> in Phone Edition.

Activities

Activities Settings control activity and calendar settings.

Options > Common > Activities
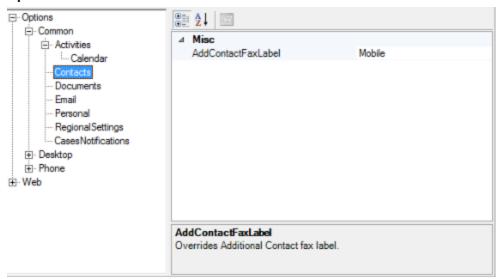
- **CarryOverCompletionNotes**: A True value will copy over notes into followup activities.
- **CheckFollowupDefault**: A True value means wMobile will automatically schedule a follow up activity by default.
- **DefaultHistorySort Order**: a DESC value will sort History activities in Descending order with the most recent activities at the top.
- **DefaultPendingSortOrder**: An ASC value will sort Pending activities in Ascending order with the soonest activities at the top.
- **HideAuditRecords**: A True value will mean that Audit records will not be displayed in the History activity list.
- **SetAlarmOnNewActivity**: A True value will automatically set an alarm on new activiites.

Contacts

The only option currently in this list is **AddContactFaxLabel** which will show the Fax field in secondary contacts with a different label such as Mobile or Cell. This provides matching functionality to a GoldMine gm.ini setting to adjust the secondary contact fax label.
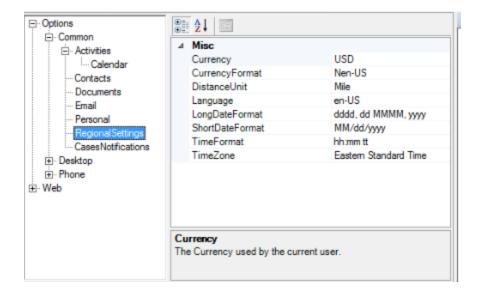
Options > Common > Contacts

Regional Settings

Regional Settings control the default date, time, currency and distance unit used by wMobile.

Options > Common > RegionalSettings

- **Currency**: The Currency used by the current user.
- **CurrencyFormat**: The Currency Format used by the current user.
- **DistanceUnit**: The Distance Unit changes whether distance will be given in either miles or kilometers when either of wMobile's Closest Contacts or Get Directions features are used.
- **LongDateFormat**: Long Date Format controls how wMobile will display date fields where the date is expressed using the Month and Day as words and/or numbers and Year.
- **ShortDateFormat**: Short Date Format controls how wMobile will display date fields where the date is expressed using the Month, Day, and Year as numbers.
- **TimeFormat**: The Time Format used by the current user.
- **TimeZone**: The Time Zone used by the current user.
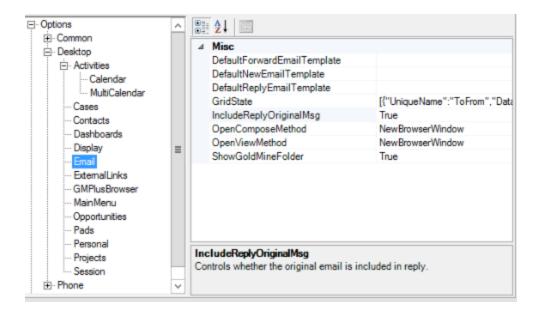
4.3.2   Default User Options - Desktop

The Desktop section contains user options specific to wMobile Desktop edition. The most commonly used and edited settings are below. Users can override the default settings by changing their individual settings in User Options.

Email

The email section contains various email preferences.

Options > Desktop > Email
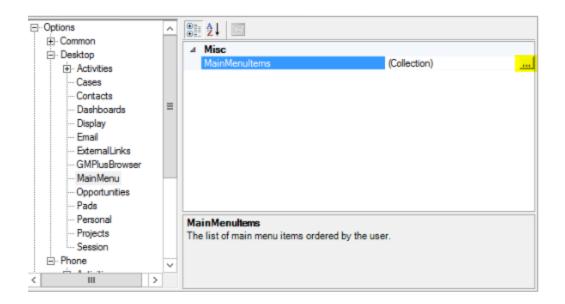
- **DefaultForwardEmailTemplate**: A default email template can be selected if there's a standard template used by all users.
- **DefaultNewEmailTemplate**: A default email template can be selected if there's a standard template used by all users.
- **DefaultReplyEmailTemplate**:A default email template can be selected if there's a standard template used by all users.
- **IncludeOriginalReplyMsg**: This setting will include the original email message in reply messages.
- **OpenComposeMethod**: A NewBrowserWindow value will open new email messages in a new browser window. This is the default value. A New Child Window will open a new Child Window in which to compose the new email. A Same Window option will display the new email message in the same window.
- **OpenViewMethod**: A NewBrowserWindow value will open new email messages in a new browser window. This is the default value. A New Child Window will open a new Child Window in which to compose the new email. A Same Window option will display the new email message in the same window.
- **ShowGoldMineFolder**: A True value will display the GoldMine Inbox in the Email Center to display emails previously downloaded into GoldMine.
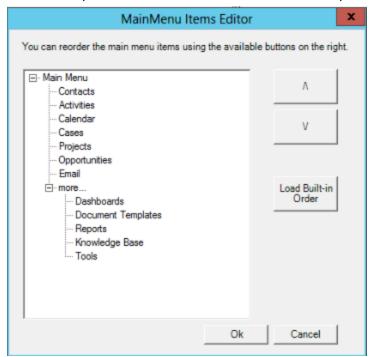
MainMenu

wMobile 5.0 introduced a new User Interface (UI) with the option to customize the main menu.

Options > Desktop > Main Menu
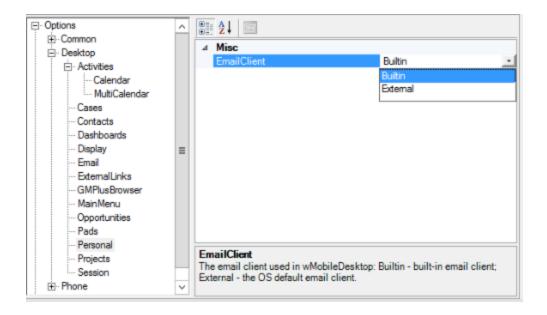
Use the ellipse button to access the Main Menu options and set the order.

Personal

The Personal setting currently only contains the EmailClient setting. A BuiltIn value will use the email client built into wMobile. An External value will mean that wMobile will prompt to open the default email client on the computer to compose a new email message.

Options > Desktop > Personal
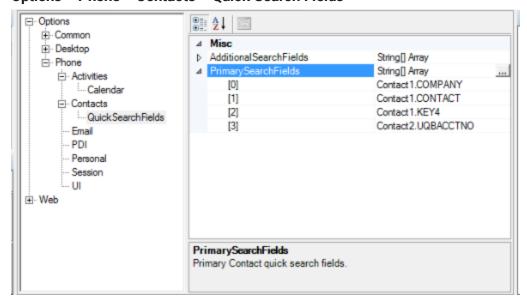
4.3.3   Default User Options - Phone

The Phone section contains user options specific to wMobile Phone edition. The most commonly used and edited settings are below. Users can override the default settings by changing their individual settings in 'My Preferences' in Phone Edition.

Contacts - Quick Search Fields

These settings can be used to set the Quick Search fields for all users.
Options > Phone > Contacts > Quick Search Fields
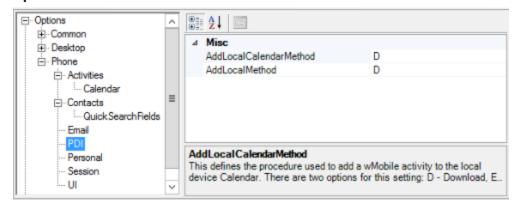
PDI

The PDI (Personal Device Interface) settings control calendar and contact download settings.
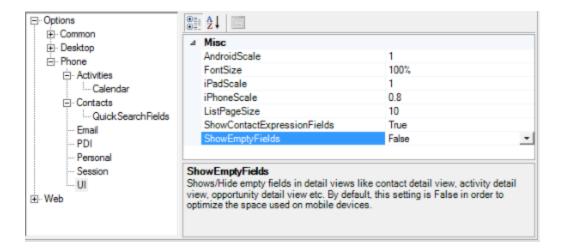
Options > Phone > PDI

- **AddLocalCalendarMethod**: This defines the procedure used to add a wMobile activity to the local device Calendar. There are two options for this setting: D - Download, E - Email.
- **AddLocalMethod**: This defines the procedure used to add a wMobile contact to the local device Address Book. There are two options for this setting: D - Download, E - Email.

UI

Options > Phone > UI

The UI (User Interface) section controls settings on hand held devices.

- **List Page Size**: The default number of items in lists is 10. This can be increased, but it would be across the whole application and could mean users wait a bit longer to display list views.
- **ShowContactExpressionFields**: If GoldMine primary or field views contain dBase Expression fields that need to be seen in wMobile, then this field should be set as True.
- **ShowEmptyFields**: Shows/Hide empty fields in detail views like contact detail view, activity detail view, opportunity detail view etc. By default, this setting is False in order to optimize the space used on mobile devices. [The default is "False" meaning that the empty fields will not be displayed, limiting scrolling through empty fields.] Empty fields are shown in Edit mode regardless of this setting.

4.4   Configuring Logo for Phone/Desktop

It is possible to add a custom company logo for the Phone and Desktop editions of wMobile. The logos need to be configured separately, and each edition has its own size requirements. The logos are set using the [wMobile Manager Console](). The acceptable image formats for the logo images are: png, gif, or jpg.

Phone Edition Logo Configuration
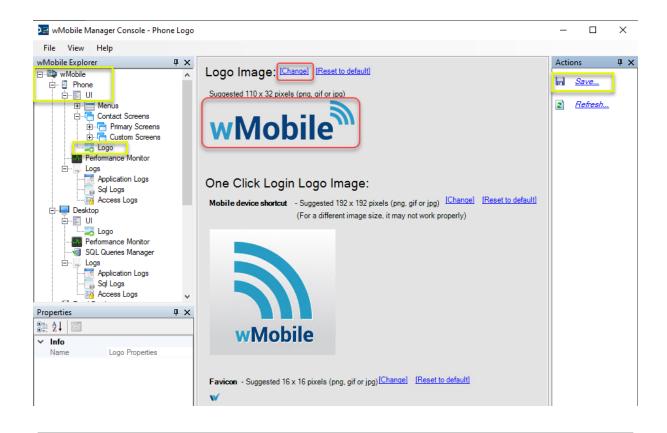
In the **wMobile Explorer** window, navigate to: **wMobile > Phone > UI > Logo**.
Click on the [Change] link and browse for a different logo using the **Open** file dialog.

NOTES:
- The logo should not be larger than 90 x 30 pixels.
- It is recommended to save the logo in the following folder: **W-Systems\wMobilePhone\res\img**

After selecting the image file, it will display in the center window. Click the **Save** link in the **Actions** window to have wMobile use the newly assigned logo.
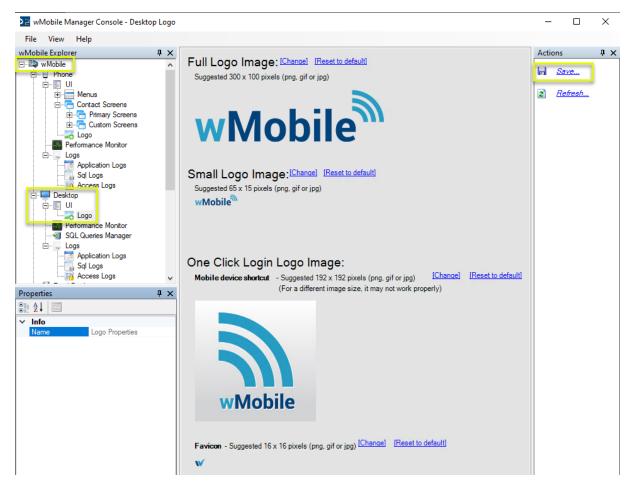
Desktop Edition Logo Configuration

In the **wMobile Explorer** window, navigate to: **wMobile > Desktop > UI > Logo**.
Click on the [Change] link and browse for a different logo using the **Open** file dialog (do this for each size logo image being changed).

NOTES:
- Desktop uses two logos: a small and a large size image. The large (full) image should not be larger than 300 x 69. The small image should not be larger than 65 x 15 pixels.
- It is recommended to save the logos in the following folder: **W-Systems\wMobileDesktop\res\img**

After selecting the image files, they will display in the center window. Click the **Save** link in the **Actions** window to have wMobile use the newly assigned logos.

4.5   Change Default Timeout Setting

Setting in wMobile Desktop/Phone

Default Timeout Setting

To change the default timeout setting, you need to edit the **KeepAliveDuration** property value.

To change this setting:
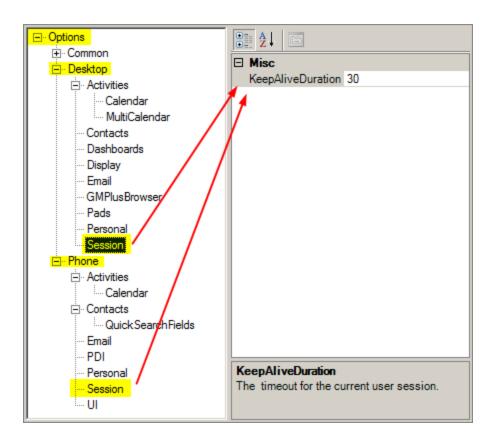
Open the wMobile Manager Console.

In the **wMobile Explorer** window, select **wMobile** and then double-click **Default User Options** in the main window.

Tree Navigation:

Options > Desktop > Session -or- **Options > Phone > Session**

- **KeepAliveDuration**: The timeout for the current user session. The default value is 30 minutes.

Setting in wMobile Using Web.config (NOTE: Using wMobile Manager Console is recommended)

Default Timeout Setting

To change the default timeout setting, you need to edit the **timeout** setting in the **Web.config** file.

To change this setting:

Click **Start** and then **Run...**

Type **notepad** and click **OK**.

Click **File > Open** and navigate to the **C:\Program Files\W-Systems\wMobilePhone** folder.

Find the **Web.config** file and open it.

Once you have the file opened in Notepad, go to **Edit > Find** and type timeout in the **Find what** field, then click **Find Next**. You're looking for the following:

Now edit the **timeout="60"** setting to the value you prefer:

Example: **timeout="45"**

After making the appropriate change, click **File > Save**.

Click **File > Exit** to close Notepad.

4.6   Configuring wMobile AddIns

wMobile Phone and Desktop both have AddIn components. Some AddIns are for GoldMine functionality, but we are also able to extend GoldMine and wMobile functionality with customized AddIns. Some customers have requested and purchased custom AddIns for specific functionality.

An AddIn can:
- Add or change User interface elements(screens, menu items, toolbar items, pads, contact tabs)
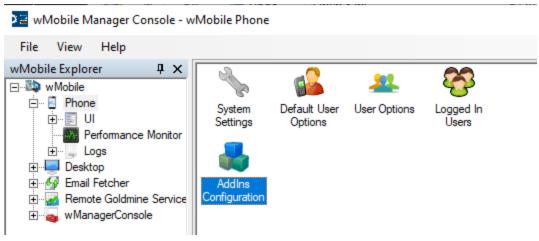
- Add User Options and System Settings. Some options will appear in User Options only if an Addin is enabled
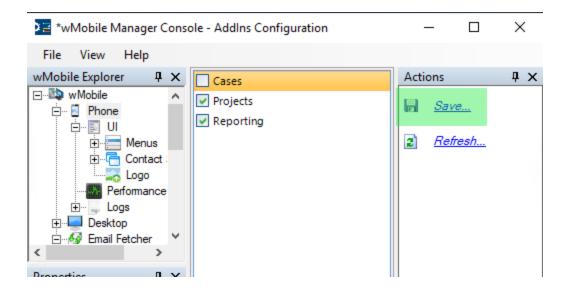
- Extend functionality or override existing functionality (this has been done for specific customer AddIns)

Some examples of the AddIns for GoldMine functionality would be Service Cases, Opportunities, and the KnowledgeBase. These AddIns can be turned on and off in the wMobile Manager Console. No customer uses ALL the features of GoldMine or wMobile, and it's easier for end-users if unused items aren't displayed. All of the built-in AddIns are enabled by default.
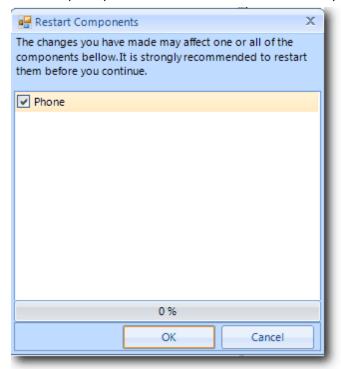
Open the wMobile Manager Console to make adjustments to AddIns for wMobile Phone and Desktop. Select the component in the wMobile Explorer Pane and select **AddIns Configuration**. We'll start with Phone.
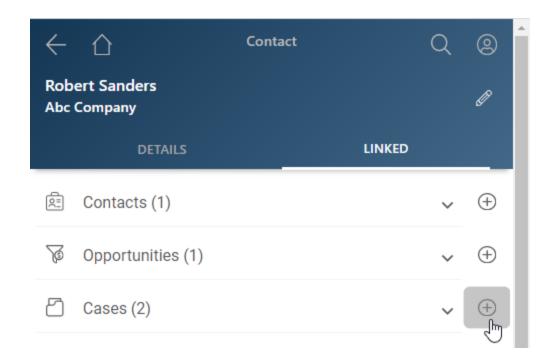
There are only 2 built-in AddIns for Phone Edition: Cases and Reporting. (If you have a custom AddIn provided by W-Systems, you'll see it in this list as well.) If you don't use the GoldMine Service Cases component, you might want to disable the Cases AddIn by unchecking it as shown below in yellow. Click **Save** to preserve this change.
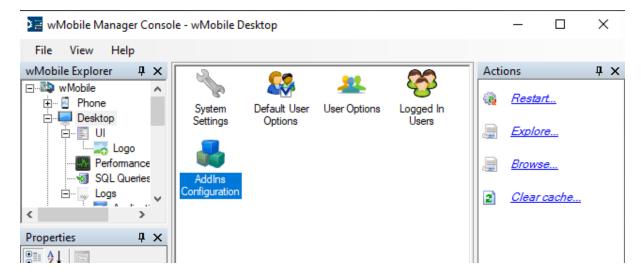
You'll be prompted to restart Phone. Click **OK** to proceed.
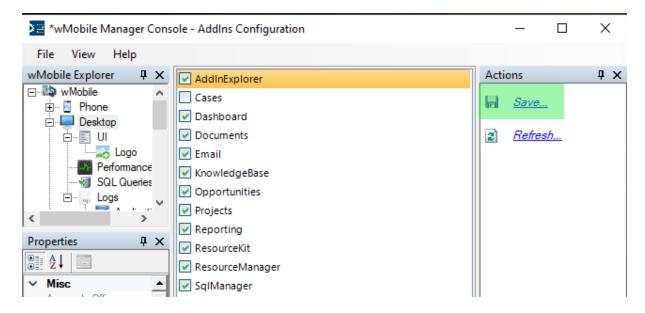
When your end users next log into wMobile, items related to Cases in Phone Edition, such as Cases on the contact record as shown below, and the option to create a New Case, will no longer be displayed.
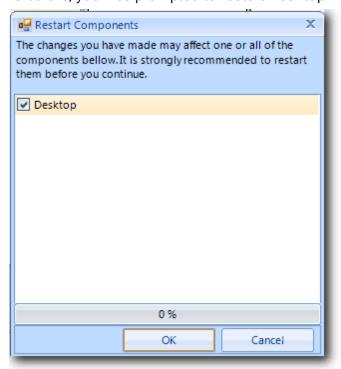
wMobile Desktop has more AddIns than Phone Edition. To view these, select Desktop in the wMobile Explorer Pane and select AddIns Configuration.

If any of these features are not used, the AddIns can be disabled by unchecking the item. (If you have a custom AddIn provided by W-Systems, you'll see it in this list as well.) Following the previous example, let's say your company doesn't use Service Cases. We'll want to disable this functionality and remove the Cases item from the toolbar. Uncheck it in the list of AddIns. When you have made your changes click **Save**.
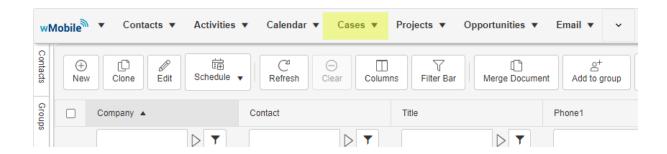
As before, you'll be prompted to restart Desktop.
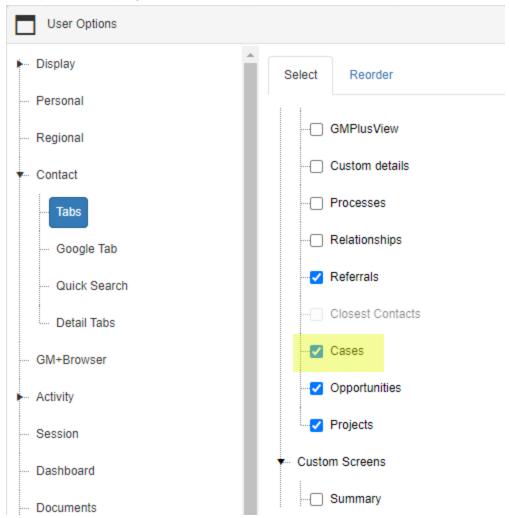
Note: Restarts of Phone or Desktop will cause users to be forced back to the login page.

When users log back into Desktop, the AddIns that were removed will no longer be visible in wMobile Desktop.
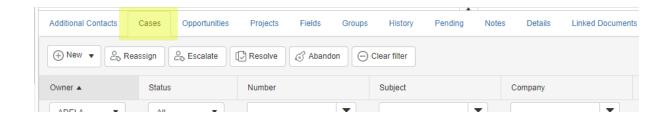
The menu item will be gone from the toolbar.

The option to display the tab will be gone from User settings.

The tab will be removed, if it was previously displayed.

4.7 Configure wMobile Manager Console Login Requirement

Setting the option to enable/disable the requirement for a wMobile Manager Console login
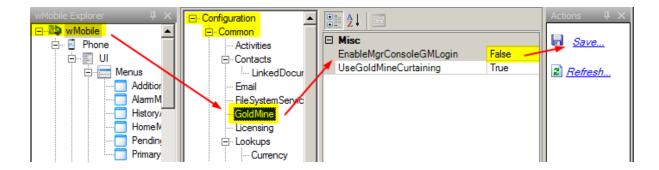
To change this setting:

Open the wMobile Manager Console.

In the **wMobile Explorer** window, select **wMobile** and then double-click **System Settings** in the main window.

Tree Navigation:
Configuration > Common > GoldMine

With **GoldMine** selected, use the drop-down for the **EnableMgrConsoleGMLogin** setting as follows:

- **EnableMgrConsoleGMLogin**: Defines whether or not an administrator is required use a GM user to login into wMobile Manager Console.
  - False = Disables the login requirement
  - True = Enables the login requirement

> ⚠️ **IMPORTANT**: The next step requires that wMobile components are restarted which will cause logged in users to lose their connections. Please be careful when this is used.
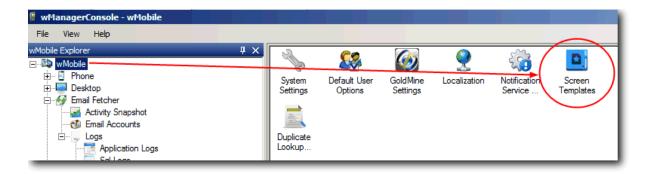
After making the selection, click **Save** in the **Actions** window and allow the components to be restarted.

4.8   Configuring Screen Templates
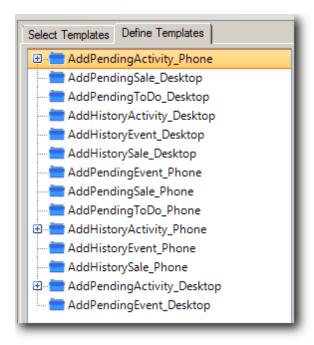
Screen templates can be used to force default values to be entered automatically for users when adding new activities.

In the Desktop Edition example below, a template is created so that all new pending appointments will default to a specific time, color, and activity code.
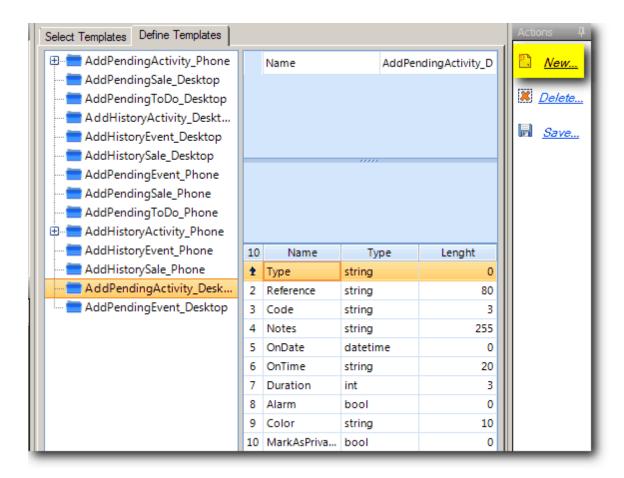
The **Screen Templates** are accessed by selecting the **wMobile** node in the **wMobile Explorer** window and then double-clicking the **Screen Templates** icon.

In the main window, select the **Define Templates** tab. There are templates for both Phone and Desktop editions.
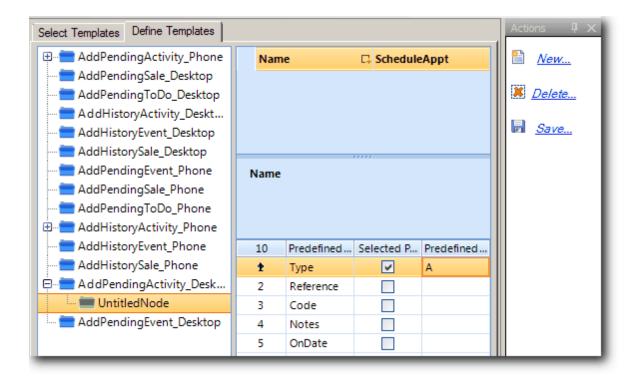
Select **AddPendingActivity_Desktop** from the **Define Templates** list.

Select **New** in the **Actions** window.

In this example, we want set a predefined behavior for Appointments:
- Place a tick in the **Selected Predefined Fields** column for **Type**.
- Enter **A** in the **Predefined Values** for column (for "Appointment"; other values that can be used are listed below).
- Enter a **Name** for the Screen Template Type.
- Click **Save** in the **Actions** window.

Activity Type Values (used for **Type**):

A = Appointment

C = Phone call

D = To-do

E = Event

O = Other Action
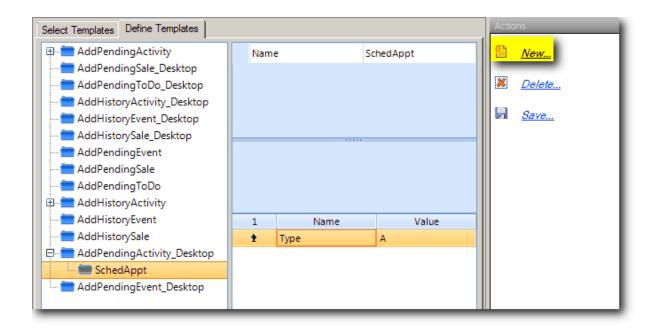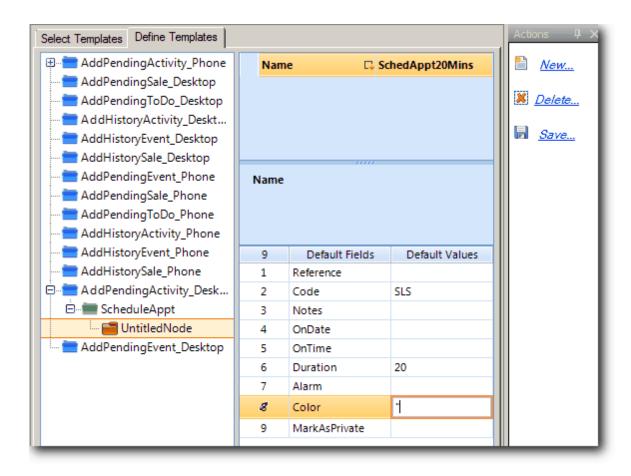
S = Forecasted Sale

Select the **Screen Template Type** created (named *SchedAppt* in this example) and select **New** from the **Actions** window.

In the example below, we'll set the **Activity Code** as "SLS" (do not include quotes), the **Duration** to 20 minutes, and set the **Color** as red (see list of available colors below). Next, give the **Screen Template** a name, and then click **Save** in the **Actions** window.

Color Options (used for **Color**):

Blue (default) = space or null

Magenta = !

Red = " (double quote)

Cyan = #

Green = $

Yellow = %

Dark cyan = &

White = ' (single quote)

Light gray = (

Maroon =)

Dark green = *

Dark yellow = +
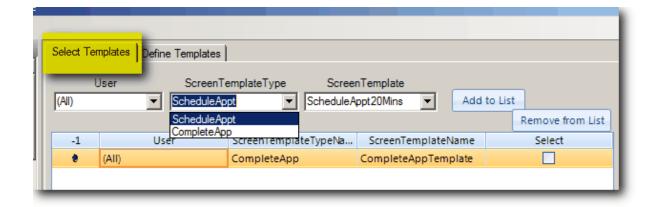
Dark blue = , (comma)

Purple = -
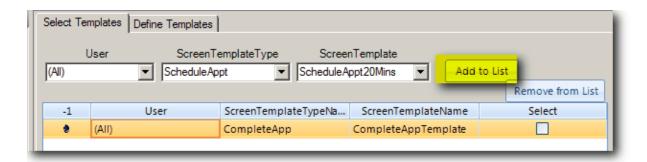
Dark gray = . (period)

Black = /
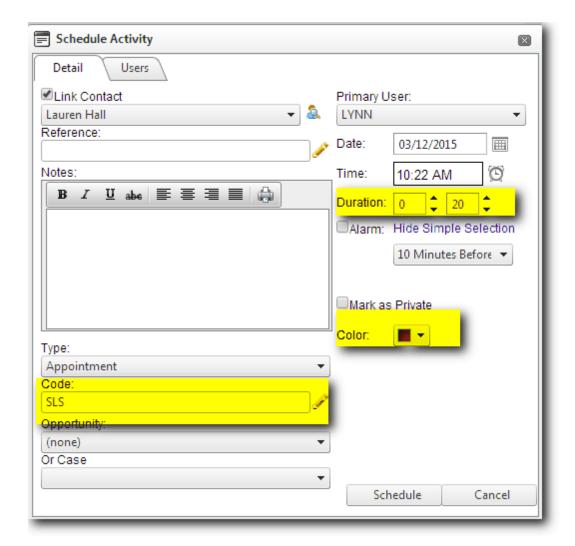
Click on the **Select Templates** tab. The screen template types and templates that have been created will appear in the **Screen Template Type** and **Screen Template** drop-down lists.

Once you have made selections from the drop-downs, click the **Add to List** button. Your selection will be added to the list in the main window.
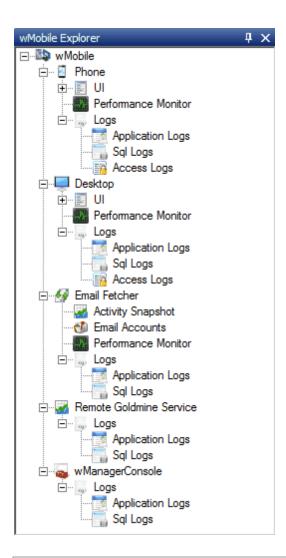
The screen template will be applied for all users when scheduling new appointments.
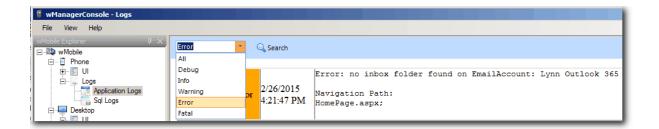
4.9   Configure Logging in wMobile Manager Console

wMobile generates logs that can be used for troubleshooting purposes. The logs created by wMobile record various types of information used to determine the causes of issues and aid in resolving them. Each component of wMobile has its own logs that can be reviewed when a customer reports a problem. In the **wMobile Explorer** window, you can access the logs for any of the installed components on the server. Each component has a **Logs** node with child nodes: **Application Logs** (application operation specific), **Sql Logs** (SQL data specific), and for certain components, **Access Logs** (access data). If needed, logs can be [cleared](#).
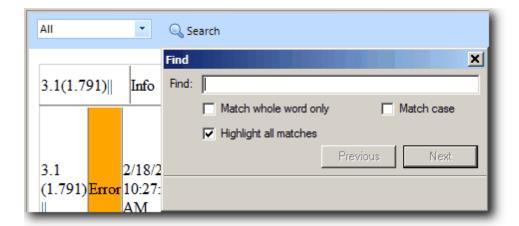
> 📄 **NOTE**: If you have a split installation (see: Installation Scenarios) of wMobile, and the Remote GoldMine Service (RGMS) is installed on another server, you will not see the Remote GoldMine Service in the wMobile Manager Console at this time. (*We hope to add that functionality in the future.*)
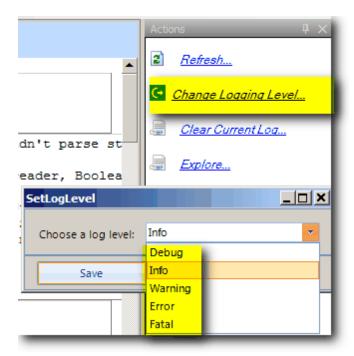
When viewing a log, the results can be filtered by using the drop-down to select a specific filter level. In this example, "Error" is being selected so we review those problems more easily.
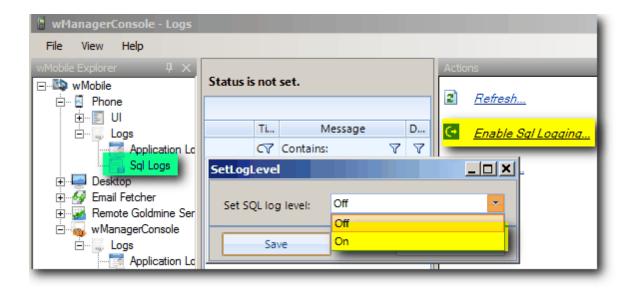
Logs can also be searched by using a text search if we are looking for an error on a specific task or contact. Click on **Search** and then enter the text to identify. In the Find dialog, use the **Previous** and **Next** buttons to navigate through the results.

If the current logging level does not contain sufficient information, we can increase the logging level to "**Debug**" causing wMobile to log more information. In the **Actions** window, select **Change Logging Level** and select **Debug** from the drop-down list. After your selection is made, click **Save**.

There is also an option to enable SQL logging. Select the **SQL Logs** node for the component in the **wMobile Explorer** window as highlighted in green below. Next, select **Enable SQL Logging** in the **Actions** window. Now set the value to **On** and click **Save**.

After the logging levels have been changed, an attempt should be made to reproduce the problem so the logs will be populated with more information. This extra level of logging helps to troubleshoot the cause of the problem.

> 📝 **NOTE**: Both **Application Logs** and **SQL Logs** are included along with the [wDiagnostics Tool](#) report when its **Send** option is used.
>
>

The logging levels should be set back to less aggressive settings after troubleshooting has been completed. The reason for this is so that the logs do not take up unnecessary disk space on the server. The **Application Logs** should be set back to **Info** and the **SQL Logs** can be disabled (i.e., set to **Off**).

> ⚠️ **IMPORTANT**: Starting with build 3.1.3.977, making changes to the logging levels in wMobile Manager Console <u>will not require components to be re-started</u>. However, if changes are made directly to the configuration file(s) or the Windows Registry pertaining to these logging settings, then the Application Pools will need to be re-started manually. In this case, any logged in wMobile users should be warned that if they do not log out that they will be forced out when the Application Pools are re-started.

Clearing Logs

Logs grow over time and can be cleared as required. The links to clear logs are available when logging is enabled for a specific logging type (Application Logs, Sql Logs, and Access Logs). Each component (Phone, Desktop, etc.) stores its own sets of logs and are cleared independently.
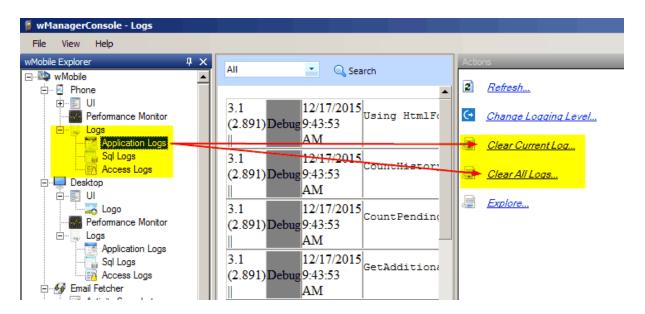
To clear logs, navigate to a specific component in the **wMobile Explorer** window (this example uses **Phone**). For this example we've navigated to **wMobile > Phone > Logs**. After

selecting one of the logging types, the **Actions** window will display the links to clear the logs:

Clear Current Log - Clears the logs of the selected log type only.
Clear All Logs - Clears the **Application Logs** and the **Sql Logs** simultaneously (NOTE: Access logs are not cleared using this command. Use the clear command on the "Access Logs" node).
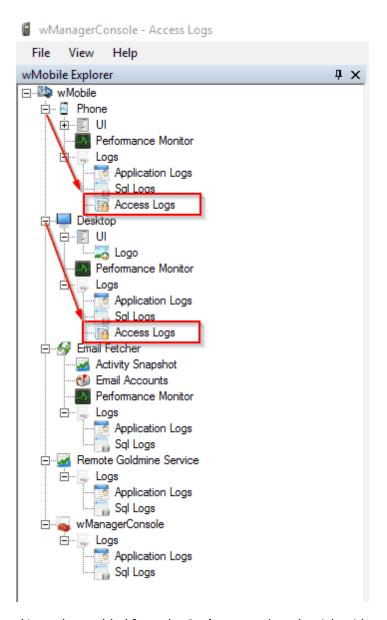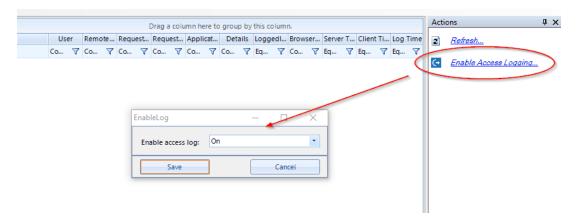
4.9.1   wMobile Access Logging

A useful feature for developers and administrators is "Access Logging". This is used to have an overview map for wMobileDesktop and wMobilePhone by retrieving information for all actions which users are performing: all pages that are visited, used browsers, timing on server side and client side (in milliseconds), all requests that are sent to the server.

Access Logging is accessible from the wMobile ManagerConsole and it's available for both web sites: wMobilePhone and wMobileDesktop.
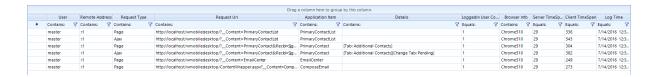
Access Logging is disabled, by default, and it can be enabled from the **Actions** panel on the right side:

After this step, each user move will be captured and stored in WT_AccessLog SQL table.
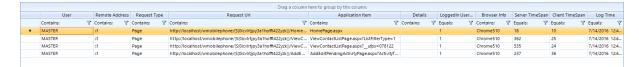
(Note: In older versions of wMobile, a prompt would appear after enabling the feature, to restart the application pool in order to take effect.)

The example below shows information for user MASTER while using wMobileDesktop:
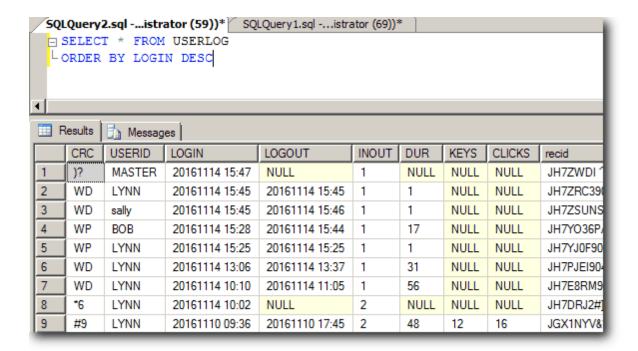
In this table we have captured 6 moves for user MASTER. As you can see, he accessed the Contact List, then navigated to a contact page and changed the tab from Additional Contacts to Pending Activities, then moved to email list and composed an email. In all this time only one user was connected (MASTER) and this can be seen in the 6th column – LoggedIn User Count. This table is also displaying the timing (in milliseconds) registered on server and client side.

Here's some data information as a result for user MASTER while using wMobilePhone:

A singled logged in user (MASTER) navigated from the Home page to the Contact List and scheduled an activity. All these steps were performed using the Google Chrome browser.
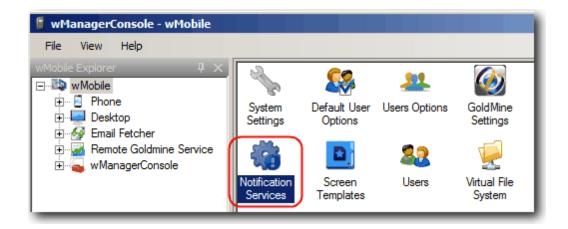
wMobile logins are also recorded in the GoldMine UserLog table. If the login was via wMobile Phone, this will be indicated by WP in the CRC column. wMobile Desktop login is indicated by WD in the CRC column.

	CRC	USERID	LOGIN	LOGOUT	INOUT	DUR	KEYS	CLICKS	recid
1	)?	MASTER	20161114 15:47	NULL	1	NULL	NULL	NULL	JH7ZWDI
2	WD	LYNN	20161114 15:45	20161114 15:45	1	1	NULL	NULL	JH7ZRC39
3	WD	sally	20161114 15:45	20161114 15:46	1	1	NULL	NULL	JH7ZSUNS
4	WP	BOB	20161114 15:28	20161114 15:44	1	17	NULL	NULL	JH7YO36P
5	WP	LYNN	20161114 15:25	20161114 15:25	1	1	NULL	NULL	JH7YJ0F90
6	WD	LYNN	20161114 13:06	20161114 13:37	1	31	NULL	NULL	JH7PJEI90
7	WD	LYNN	20161114 10:10	20161114 11:05	1	56	NULL	NULL	JH7E8RM9
8	*6	LYNN	20161114 10:02	NULL	2	NULL	NULL	NULL	JH7DRJ2#
9	#9	LYNN	20161110 09:36	20161110 17:45	2	48	12	16	JGX1NYV&

4.10   Configuring Notification Services
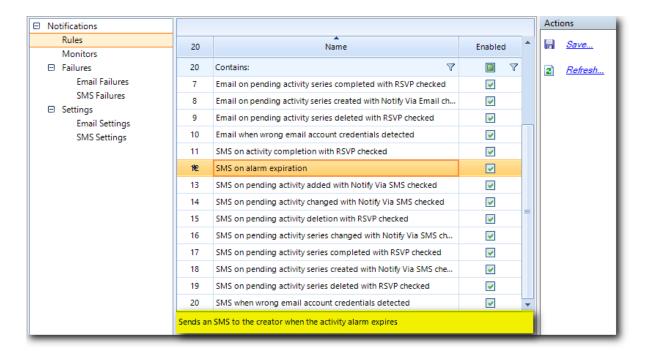
wMobile uses **Notification Services** to support activity notifications such as activity alarms, notifying users when a new activity has been created for them, and RSVP notifications. By default the **Notification Services** are not enabled and require configuration before they can be used.

The configuration is done using wMobile Manager Console. Access the settings by double-clicking the **Notification Services** icon in the center window.

Notification Rules

wMobile comes with a set of built-in notification rules that define the actions that will be executed under certain conditions, when a specific event is fired. Each notification rule has a description that explains its behavior.
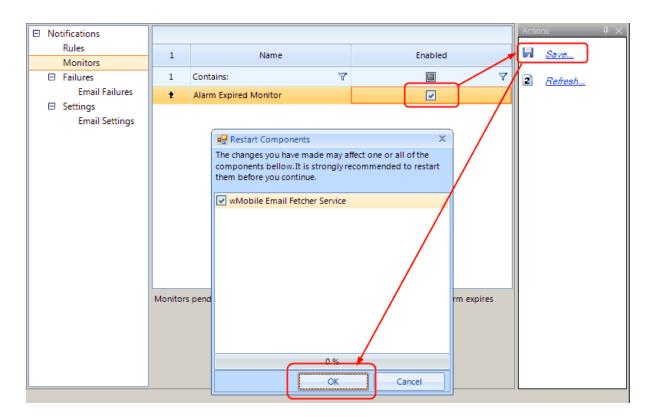
Notification Monitors

As we mentioned earlier, wMobile uses some background tasks to fire time flow related events like alarm expiration. These tasks are called **Event Monitors** and they are running
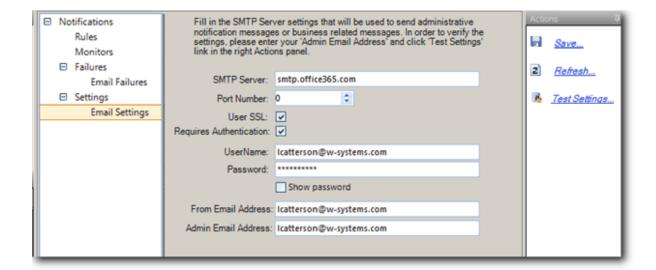
inside wMobile **Email Fetcher**. Currently, wMobile deploys an **Alarm Monitor** that is used to fire alarm expiration events. This monitor is not enabled by default when you install wMobile. If you want alarm notifications in your system, you will need to open **Notification Services** configuration, then select **Notifications > Monitors** and put a check in the event monitor list for **Alarm Expired Monitor** to enable it. To complete the configuration, click the **Save** in the **Actions** window.

After clicking **Save**, click **OK** when prompted to restart wMobile Email Fetcher Service. The Email Fetcher restart is mandatory in order for **Alarm Monitor** to run.

4.10.1 Configuring Email Settings for Notifications

Notification Services requires configuring an SMTP server account that will be used to send the email notifications asynchronously. Here is an example of the **Notifications > Settings > Email Settings** filled in (please note that your settings will be different than in this example).

After entering the **Email Settings**, click the **Test Settings...** command link in the **Actions** window on the right. If the test is successful, click **Save** (also in the **Actions** window).

> 📓 **NOTE**: All email notifications are sent asynchronously via Email Fetcher service. wMobile users will not have to wait for emails to be sent, this process is transparent for them.

4.10.2 Configuring SMS Settings for Notifications

The wMobile Notification Service originally supported only email notifications, but Short Message Service (SMS) notification support was added shortly thereafter. In order for wMobile to able to send texts, SMS settings must be configured in the wMobile Manager Console.

The example below uses Twilio. Please contact wMobile support if you'd like to integrate another SMS service.

Twilio SMS Client Configuration
The default SMS client we are using is Twillio, because it provides powerful messaging features. To configure the Twilio in the wMobile Notification Service you must first go on the Twilio website and receive an Account SID and Authentication Token.

To be specific, after creating the Twilio account, the Account SID and Authentication Token can be found under Home / Dashboard / Console Dashboard (see Figure 1: Twilio Credentials).
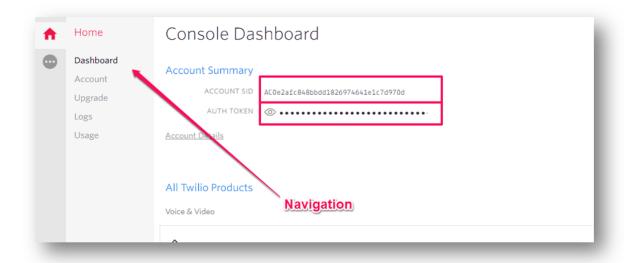
Figure 1: Twilio Credentials

After getting the credentials, for the Twilio account to work you need caller phone number and some verified caller ids.

Eg: phone x sends messages to phones y and z

The caller phone number can be found under Home / Dashboard / Phone Numbers / (see Figure 2: View caller phone numbers).

On the account creation, no numbers should be assigned. (See Figure 3: Get a caller phone number)
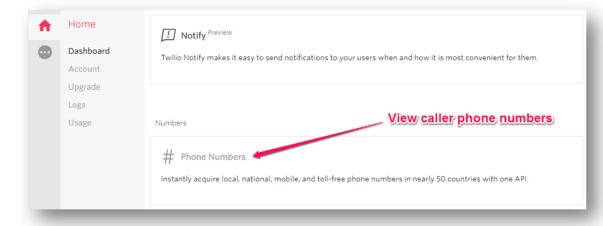
Figure 2: View caller phone numbers
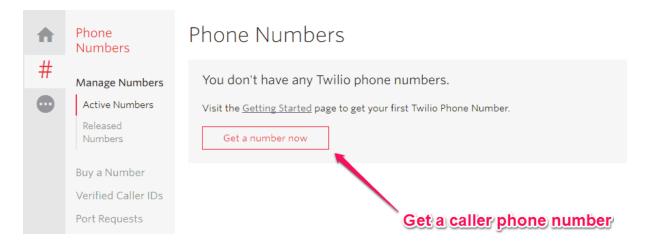
Figure 3: Get a caller phone number

Now that we have the caller phone number (phone x in the example above) we need the verified caller ids. Those numbers can be found under Phone Numbers / Verified Caller IDS (see Figure 3: Verified Caller IDS). This might be your own corporate cell phone number for testing. When you're ready to go live, each user that will be sent SMS texts from wMobile must be added here.

Figure 3: Verified Caller IDS

 In the Figure 3 it is shown how a Twilio user can modify or add an existing receiver phone number.

After this step, proceed to the wMobile Manager Console with your wMobile user account and under the Notifications Services, locate the SMS Settings (see Figure 4: Notifications SMS Settings).

Enter the data as follows:
  Test phone (text field) - enter a verified caller ID phone that will be used for testing purposes
 (see Figure 3)
  Sender phone (text field) - enter the caller phone number (see Figure 2)
  Account SID and **Authentication Token** (text fields) - enter the Twilio credentials (see Figure 1)
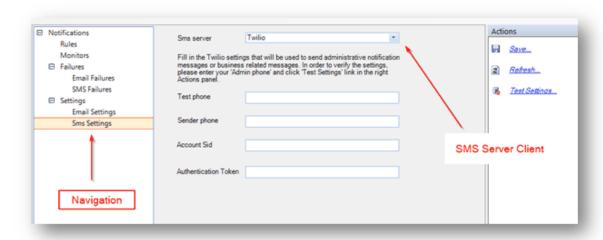
Figure 4: Notifications SMS Settings

After the data is inserted you can test the data or save it. Now the wMobile Twilio SMS Service is running and the users can receive notifications SMS.

SMS Notification Rules

The wMobile Notification Service has a built-in SMS rule that must be active in order for SMS sending to work. This rule can be found in the **Rules** section under the **Notification Services** in wMobile Manager Console (Figure 5: SMS Notification Rules). Individual rules can be enabled or disabled.
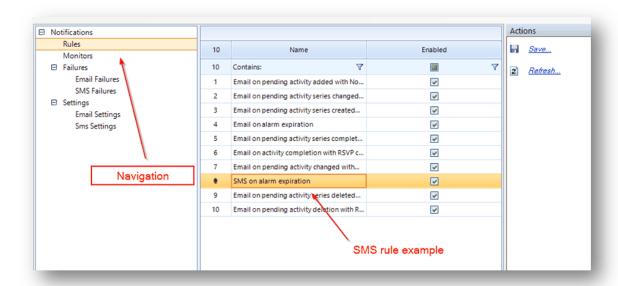
Figure 5: SMS Notification Rules

In Figure 5 we highlight the "SMS on alarm expiration" rule. This rule sends an SMS when an activity alarm in wMobile occurs. In order to work, this rule needs the "Alarm Expired Monitor" to be activated (see Notification Monitors section in the related blog post).

Setting wMobile user phone number

In order to receive an SMS, the phone number must be placed in both Twilio and wMobile.

First, the phone number must be registered into Twilio under Manage Caller IDs (see Figure 3: Verified Caller IDs).

After that the wMobile user with that phone number must be included in his or her wMobile settings. The location of the setting in wMobile Desktop is in Tools / Options / Personal (Figure 6: wMobile User Phone Number).
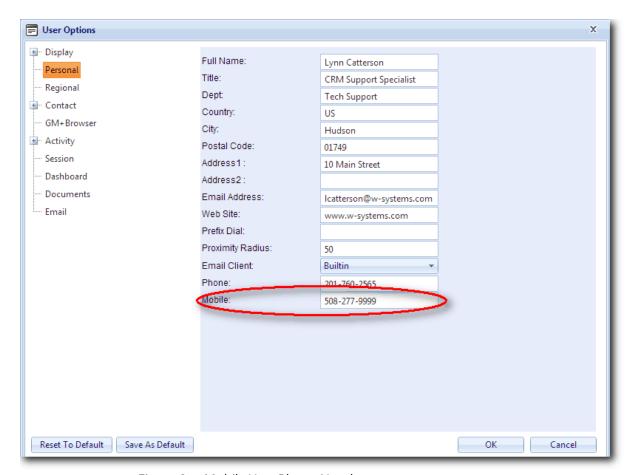
Figure 6: wMobile User Phone Number

An administrator can add the number from the wMobile Manager Console User Options.
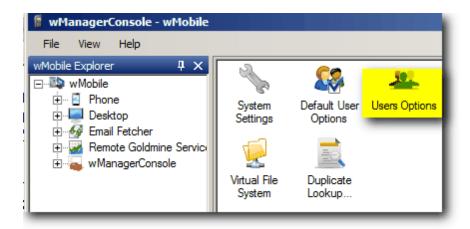
Figure 7: User Options

Select the user from the drop down list.
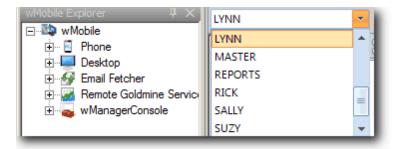
Figure 8: User list in User Options

The number can be added in the Mobile listing as shown below.
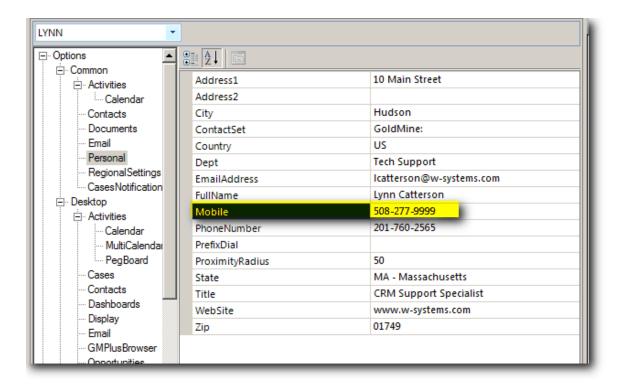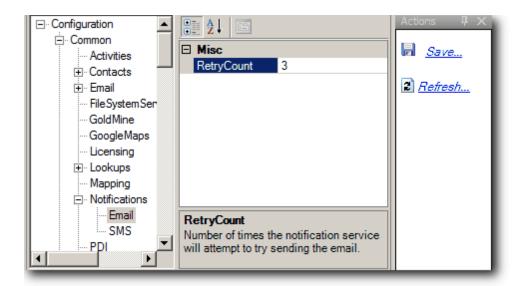
Figure 9: Mobile number in User Options

4.10.3 Notification Services Failure Mgt
Failure Management
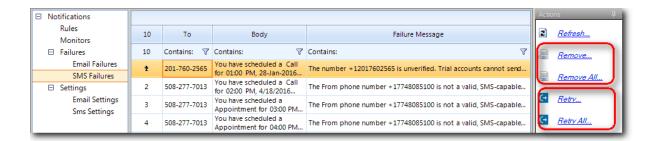
There will be occasions when the system will not be able to send email or SMS notifications. This may be due to the email server being down, the server is not accessible, or the server settings have been changed, and your notifications will not be sent.

By default, the system will try to send a notification for a specified number of times. Once that number is reached and the notification cannot be sent, it will be moved into a list of **Email Failures** or **SMS Failures**, as appropriate. The default retry count is 3, but can be adjusted in the System Settings under Configuration > Common > Notifications.

This list is accessible from [wMobile Manager Console](#) and the notifications can be further managed as follows:

- One or more can be removed from **Email Failures** or **SMS Failures** list using the **Remove** (remove a specific email by selecting the one to remove) or **Remove All** command in the **Actions** window.

- They can be re-posted into the notification queue for retry using the **Retry** (retry a specific email by selecting the one to retry) or **Retry All** command in the **Actions** window.
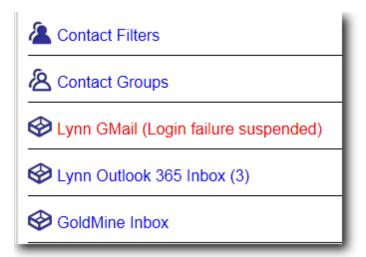
4.10.4 Using Notification Services to Update Email Passwords

The wMobile Notification Services can be used to notify users when their email passwords have changed and provide a link to update the password. This was developed for customers whose email passwords change periodically.

The wMobile email fetcher service checks for new emails in user email accounts on the server or Internet Service Provider and copies them to wMobile. Using default settings, this happens every 30 minutes but can be adjusted. So when users log into wMobile Phone or Desktop, they see new email. If the password has changed, eventually this check by the

wMobile email fetcher service gets disabled to save resources on the server. In this event, the user will not see new email and will not be able to use wMobile to send or receive email until the password is updated. The user does have some visual cues that there's a problem.

In wMobile phone, the email account will be listed in red with a note regarding the suspended status.
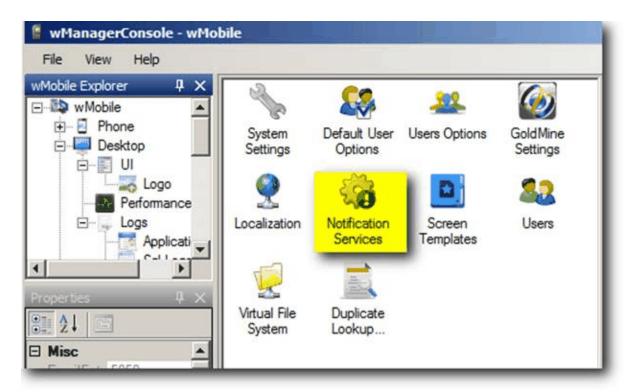
In wMobile Desktop, the account appears in red with a Stop sign.
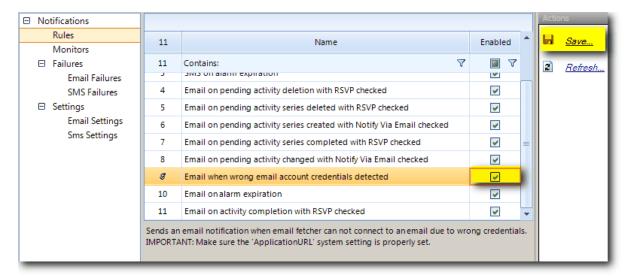
However, now we can proactively notify a user before they even log into wMobile using the Notification Services.

In the wMobile Manager Console, select **Notification Services** as shown below.

Enable the rule '**Email when wrong email account credentials detected**' by placing a checkmark in the **Enabled** column. Select **Save** when the change is made.
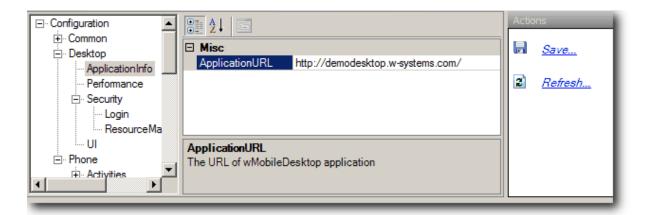
The Email Settings must be configured so an email notification can be sent.
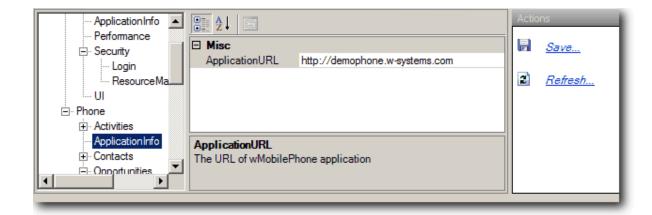
In order to send a message with a page to update the credentials, the wMobile web address must be provided for wMobile Desktop and Phone. Select **System Settings**.
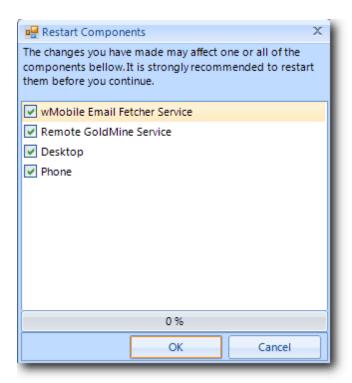
Navigate to **Configuration > Desktop > Application Info**. Enter the web address of wMobile Desktop. Your company web address might use an IP address or a domain name.
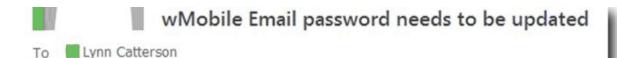
Next, navigate to **Configuration > Phone > Application Info**. Enter the web address of wMobile Phone. Your company web address might use an IP address or a domain name.

When both changes have been made, select **Save** in the **Actions** pane. If you are prompted to restart services, click **OK** to do so.

Now in the future, if a user's email password changes and they haven't updated it in wMobile, they'll get a message like the one shown below with a link to change the password.

The '**click here**' link will open a browser and direct the user to a page to update the password. Otherwise, a web link is also provided. The user must know the old password and the correct new password. On clicking **OK**, the credentials will be tested as shown below in blue.

On a successful test, the user will receive a confirmation of the updated password, and will have links to go to the wMobile Phone or Desktop login page.

If the user enters either the old password or the new password incorrectly, they will get an error message and have the opportunity to try again.

We hope that you will find this functionality useful!
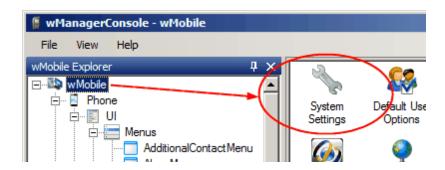
Note: Applicable to wMobile 3.1.3.268 and above

4.11   Managing Duplicate Detection (Contacts)

This topic refers to a handful of settings in wMobile Manager Console allowing for some control over handling contact duplication up front, that is, before contacts are duplicated in your database. When creating new contact records or editing existing contact ones, wMobile provides control over duplication, allowing duplicates in without warning, or informing the user before the duplication is made in your database.
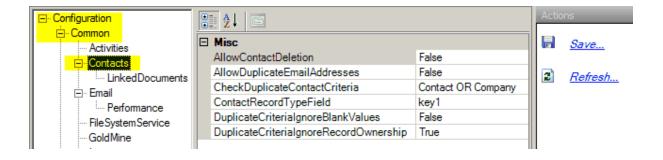
Accessing the wMobile Manager Console System Settings

wMobile system wide settings are configured from within the wMobile Manager Console. On the wMobile server, this tool can be started from the Windows Start menu. The **System Settings** are accessed by selecting the **wMobile** node in the **wMobile Explorer** window and then double-clicking the **System Settings** icon.

The settings discussed here are in the "**Common**" section and will affect both wMobile Phone and wMobile Desktop. To access these specific settings, navigate the tree list as follows:

Configuration > Common > Contacts

These four (4) settings are covered below:
- AllowDuplicateEmailAddresses
- CheckDuplicateContactCriteria
- DuplicateCriteriaIgnoreBlankValues
- DuplicateCriteriaIgnoreRecordOwnership

AllowDuplicateEmailAddresses

This setting controls whether duplicate email addresses can be entered into wMobile for separate contacts. This is normally not recommended because email messages are linked based on a matching email address.

Settings are: **True** or **False**

False = (Recommended) Avoids users from saving duplicate email addresses within the database. With this setting, the user will be warned the email address already exists.

True = Allows duplicate email addresses within the database. With this setting, the user will not be warned they're duplicating an email address when the record is saved.

In wMobile Phone, the user will see this message appear:

CheckDuplicateContactCriteria

The desired setting will depend on how the information in your GoldMine database is used. Some companies have a "company-centric" database where each company they work with has a record in GoldMine, and all the contacts they work with are entered as "additional contacts" linked to a company record. Some companies have a "contact-centric" database where they have a separate GoldMine record for each contact they work with. In the latter case, you would not want to be detecting duplicates based on Company, because you'd expect to have multiple records with the same company name. Another consideration is whether you have individual people as customers, where there's no company name. Detecting duplicates based on Company wouldn't be very helpful in that case. You'd want to match on Contact, or perhaps Company AND contact, so both would have to match for the new contact to be detected as a potential duplicate. Based on your specific need here is a description of the settings:

Settings are: **None**, **Company**, **Contact**, **Company AND Contact**, and **Company OR Contact**.

None – wMobile will not consider records to be duplicated and allow them to be created.
Company – wMobile will check only the **Company** field for duplications.
Contact - wMobile will check only **Contact** field for duplications.
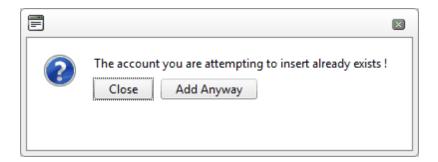
Company AND Contact – wMobile will check both the **Company** field and the **Contact** field. If "*both*" of these fields match an existing record, the new one will not be inserted.
Company OR Contact – wMobile will check both the **Company** field and the **Contact** field. If "*either one*" of these fields match an existing record, the new one will not be inserted.

In wMobile Desktop the user will see this message when a duplication warning is presented:

DuplicateCriteriaIgnoreBlankValues

This setting specifies if the contact duplication criteria will take blank values into consideration. The desired setting will depend on how contacts are added in GoldMine. For example, if you have many records where there's no company name, then you'd want to set this as **True** to ignore the blank company field.

Settings are: **True** or **False**

True = wMobile will check for duplication using criteria from "CheckDuplicateContactCriteria" and "will ignore" records with Company/Contact fields that are empty:

- CheckDuplicateContactCriteria = Company and DuplicateCriteriaIgnoreBlankValues = True, if user is trying to insert a new record with the Company field empty and the database has an existing record with the Company field empty, wMobile will not detect this as a duplicate.
- CheckDuplicateContactCriteria = Company OR Contact and DuplicateCriteriaIgnoreBlankValues = True, if the user trying to insert a new record with the Contact field or the Company field empty and the database has an existing record with the Contact field or the Company field empty, wMobile will not detect this as a duplicate.

False = wMobile will check for duplication using criteria from "CheckDuplicateContactCriteria"and "will not ignore" records with Company/Contact fields that are empty:

- CheckDuplicateContactCriteria = Company and DuplicateCriteriaIgnoreBlankValues = False, if user trying to insert a new record with Company field empty and the database has an existing record with Company field empty, wMobile will detect this as duplicate.
- CheckDuplicateContactCriteria = Company OR Contact and DuplicateCriteriaIgnoreBlankValues = False, if the user trying to insert new record with the Contact field or the Company field empty and the database has an existing record with the Contact field or the Company field empty, wMobile will detect this as duplicate.

In wMobile Phone, the user will see this message appear:

DuplicateCriteriaIgnoreRecordOwnership

This setting controls whether record ownership is honored or ignored when checking for possible duplication.

Settings are: **True** or **False**

True = wMobile will not take record ownership/curtaining into account for evaluating potential duplicates. This means that if a duplicate exists in the database, a user would be notified of a potential duplicate, even if he or she doesn't have access to see it.

False = This forces wMobile to honor (i.e., not ignore) record ownership/curtaining. If a user adds a record that already exists, he or she will not get any warning of a potential duplicate.

wMobile will take record ownership/curtaining into account for evaluating potential duplicates. This means that if a duplicate exists in the database, a user would not be notified of a potential duplicate because they do not have rights to access that record.

In wMobile Desktop the user will see this message when a duplication warning is presented:
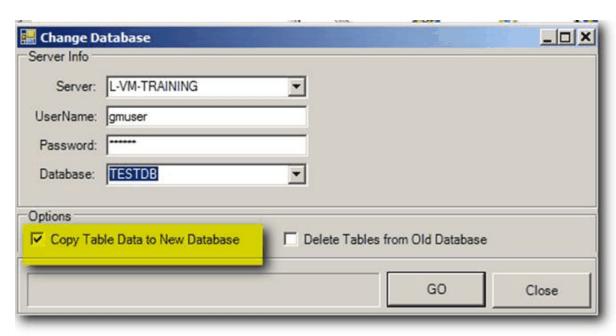
4.12   Change Database (for re-hosting)

On occasion, you might need to change the SQL database used for GoldMine and wMobile. If a backup of the SQL database has been used, then the wMobile SQL tables will be present. These table names begin with WT_.
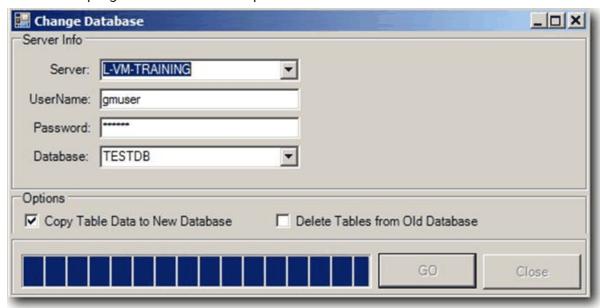
If the new SQL database is not a restoration of an existing database, there's an option in the wMobile Manager Console to copy the wMobile tables to the new SQL database. Select **Change Database** as shown below.
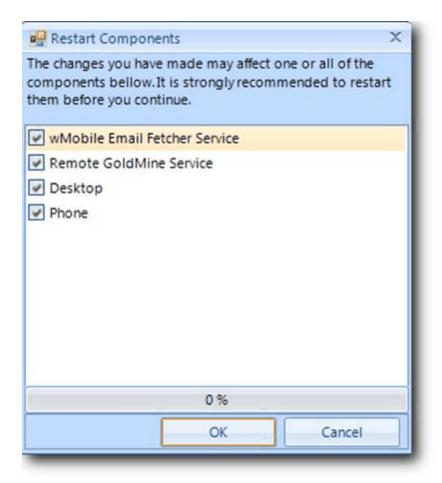
Checkmark '**Copy Table Data to New Database**.'

You'll see a progress bar as the task proceeds.
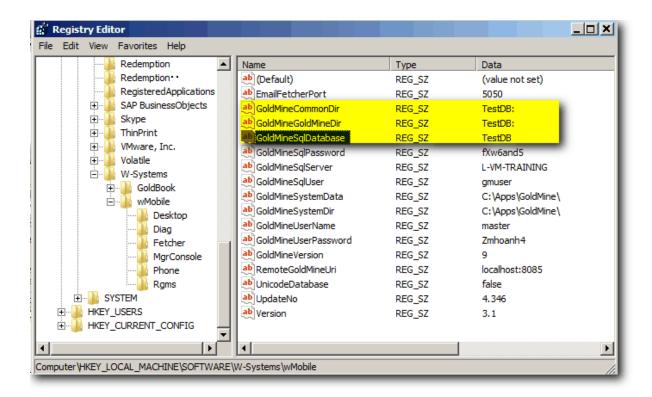
You'll be prompted to restart services when the task is completed.

The wMobile registry key will also need to be updated with the appropriate GoldMineCommonDir and GoldMineGoldMineDir and values.

4.13   Configuring Users

When a user attempts to log into wMobile, wMobile first determines if that user is permitted to log in via wMobile. If the user is permitted to log in, then the credentials supplied by the user are passed to the Remote GoldMine Service. The Remote GoldMine Service checks the username and password against GoldMine. If the username/password combination matches GoldMine, then the user is logged into wMobile. To simplify, ask yourself these questions:

1. Is the user allowed to log into wMobile?
2. Is the user's account unlocked in wMobile?
3. Does the supplied username and password match GoldMine?

If all three of these questions are answered "Yes", then the user is logged into wMobile.

From a technical perspective, its important to note that 1 and 2 in the example above occur at the wMobile server. wMobile will attempt to pass the credentials to the Remote GoldMine Service only **after** these 2 factors have been satisfied with a 'True' result, regardless of the credentials passed by the user on the login page are correct or incorrect.

If the username supplied on the login page is not permitted to log into wMobile, the user will get the error: **Login Failed. The specified user has no rights to log into wMobile.**

If a user fails to login by supplying an invalid password, the user will get the error: **Login Failed. Account is locked after repeated login failures. Please contact your wMobile administrator to release the lock.**

This three-factor authentication allows administrators to prevent unauthorized or malicious usage of wMobile by non-mobile users, users who attempt guess a valid users password or attempts to use wMobile from a lost or stolen device.

In this section, we will discuss how to configure users and security in wMobile to ensure the security of your GoldMine information.

This section has been structured to provide a guided approach to adding and configuring user accounts and account security. By following the **'See Also'** section at the bottom of each page, you will be able to move through the steps of adding and configuring a user for wMobile access.

See Also:
📄 Adding or Updating Users to wMobile
📄 Configuring User Profiles
📄 Configuring Email Accounts in wMobile
📄 Logged In Users: Viewing / Logging Out
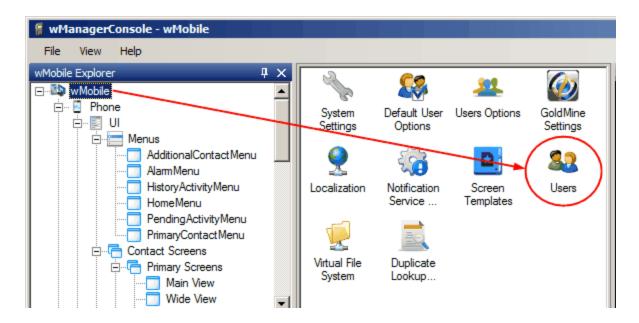
4.13.1   Adding or Updating Users in wMobile

wMobile automatically maintains an internal list of GoldMine users and User Group membership. This is done to provide additional layers of security, permit administrators to configure users with different settings when accessing wMobile from a mobile device or web browser and to improve performance.
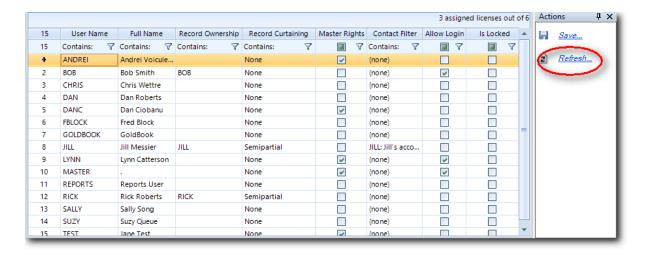
Because wMobile maintains its own list of users, the list updates itself when:

1. Users are added or removed from GoldMine.
2. Users are added or removed from User Groups.
3. User groups are added added or removed from GoldMine.

To access the **Users** icon, click on the **wMobile** node from within the **wMobile Explorer** window.

The GoldMine users list is cached and periodically refreshed. If you have just added a user to GoldMine, click on the Refresh option in the Actions pane to refresh the list.

See Also:
📄 Configuring User Profiles
📄 Configuring Email Accounts in wMobile
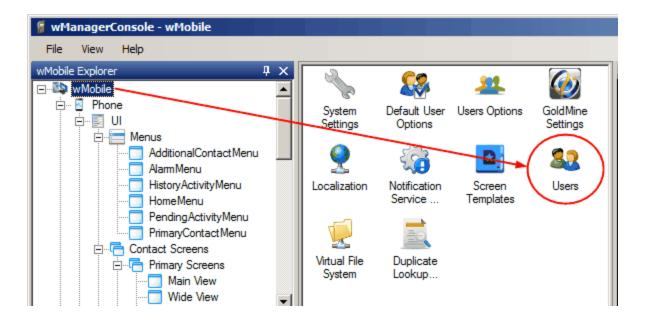
4.13.2   Configuring User Profiles

Users (GoldMine User List)

Users determines which users can log into wMobile in addition to displaying the default Ownership, Curtaining, Record Set, and feature access that the user will have when logging into wMobile.

This section will describe the options for users and explain what the options control.

To access the **Users (GoldMine User List)**, click on the **wMobile** node from within the **wMobile Explorer** window and then double-click the **Users** icon.
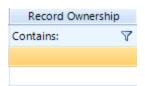
> ⚠ **IMPORTANT:**
> Configuration of Record Ownership, Record Curtaining, and Master Rights are read from GoldMine. Adjusting the Contact Filter within the Manager Console will apply to wMobile ONLY (i.e., this is a wMobile- specific setting).

The **User Name** and **User's Full Name** columns contain the same information from the GoldMine user list. Both of these columns are READ-ONLY. They cannot be changed in the Manager Console.

User Name	Full Name
Contains: ▽	Contains: ▽
ADMINIST	
GUEST	
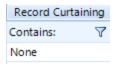
The **Record Ownership** column is READ-ONLY and displays the owner of new records created by the user in wMobile.

Record Ownership
Contains: ▽
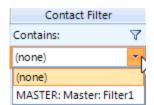
The **Record Curtaining** column (READ-ONLY) determines the curtaining level of of new records created by the user in wMobile.
The possible values for this column are:
- **No curtaining(public)**: All the users can view the entire Contact Record.
- **Partial**: Users who are not record owners can view only the contact name, and phone number areas.
- **Semi-partial (hide tabs)**: Users who are not record owners can view the upper four panes, but cannot view the Tabs.
- **Complete**: Users who are not owners cannot access any of the contact information.

Record Curtaining
Contains: ▽
None

The **Contact Filter** column uses Filters from GoldMine to determine which records the user will have access to in wMobile.

Contact Filter
Contains: ▽
(none) ▾
(none)
MASTER: Master: Filter1
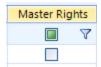
The **Master Rights** (READ-ONLY) column sets the user with advanced settings:
- Ability to Create and Edit Detail Types

- Ability to see all records, regardless of curtaining.
- Ability to see all Users Activities, regardless of User Access settings.

The **Allow Login** column enables wMobile access for the user.

> 📔 **NOTE:** The number of users with "Allow Login" checked can never exceed the number of wMobile licenses you have purchased. For example, if you have a 5-user license of wMobile, then you can only check "Allow Login" for up to 5 GoldMine users.

The **Is Locked** column displays if the user account has been locked because of multiple failed login attempts.

If a user account is locked, this checkbox will be checked and must be cleared before the user can log into wMobile again. To unlock a user account, remove the check mark from the checkbox column and the number of logins for that user account is set to 0.

The number of login attempts allowed before an account is locked is controlled by the MaxFailedLogins property of the System Settings.

> 📔 **NOTE:** This checkbox setting is controlled by wMobile (i.e., set to "checked") when the number of failed logins has been exceeded by the user. *This column can be set manually*. To manually restrict access to wMobile for a particular user check the column for the user you desire to restrict access or un-check "Allow Login" instead. If you check the Is Locked column the number of logins.

The **Actions** window will contain these tools:

Save: Save the configuration for user account.

Refresh: Restore the configuration to the last save action. Any modification done to a user account , from the last save action will be lost.

📇 **NOTE:** Any modification done for a user account must be saved by pressing **Save** in the **Actions** window.

⚠ **IMPORTANT:** The MASTER username's default password is well-known in the GoldMine community. If you wish to set MASTER to log into wMobile, be sure to change the password before enabling the username for login.

🐤 **CONFIGURATION NOTE**: When updating User Profile settings, the user must log out of wMobile and then log back in for the changes to take effect.

See Also:
📄 [Adding or Updating Users in wMobile](#)
📄 [Configuring Email Accounts in wMobile](#)
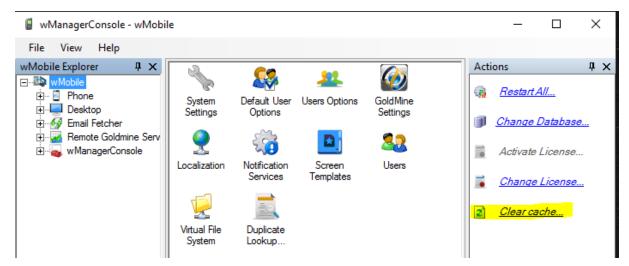
4.13.3 Clear Cache

There is an option to Clear Cache in the wMobile Manager Console. Examples when Clear Cache might be used are:
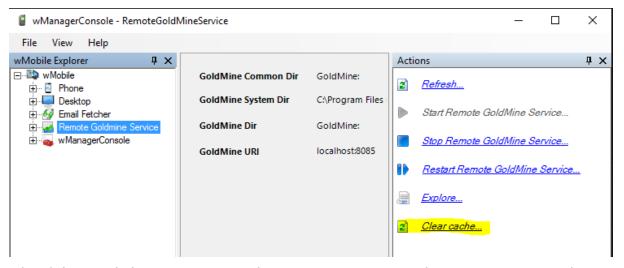
- When a user is added to GoldMine and doesn't yet appear on the wMobile user list to grant login access
- When a GoldMine user is added or removed from a GoldMine user group for updating record access

- When user ownership settings are changed in GoldMine.

If 'Clear cache' is clicked from wMobile root, cache is reset for all components.

If 'Clear cache' is clicked from one of the components, only cache from that component is reset.

When 'Clear cache' action is executed, a request is sent to each component or to only one component for resetting cache.

Data cleared from cache includes:

- GoldMine Users' Security
- GoldMine User Groups
- Users
- GoldMine DbAliases

- GoldMine DbOwner
- Email Accounts
- Custom Screen Tabs (wMobileDesktop)
- GoldMine View Tabs (wMobileDesktop)
- Contact Details Tabs (wMobileDesktop)

Normally, wMobile caches these settings for 4 hours before refreshing them automatically. This feature will be helpful for administrators when they are changing user permissions in GoldMine and wish to force a clearing of cache for the changes to take effect in wMobile.
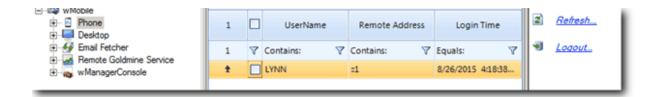
wMobile users will still also need to logout of wMobile and back in for changes to take effect.

4.13.4 Logged In Users: Viewing / Logging Out
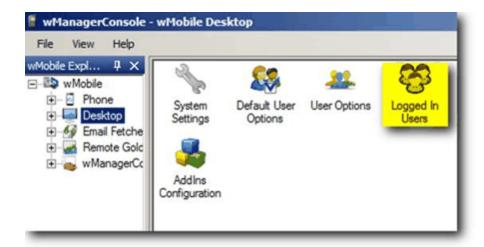
Using the wMobile Manager Console, it is possible to view which users are currently logged into **Phone** and **Desktop** respectively. To access this information, start by selecting either the **Phone** or **Desktop** node in the **wMobile Explorer** window. In the following example, the logged in users for **Phone** will be displayed.
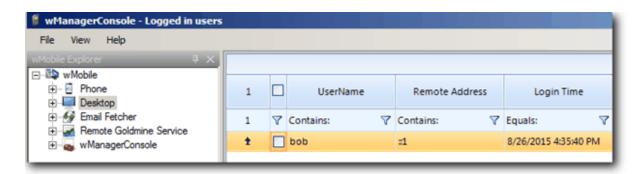
After selecting the **Phone** node, double-click the **Logged in Users** icon (shown above) to display a list of users currently logged into wMobile Phone.

To get a complete number of users logged in (i.e., an aggregate of Phone + Desktop), Desktop would need to be checked for logged in users as well.
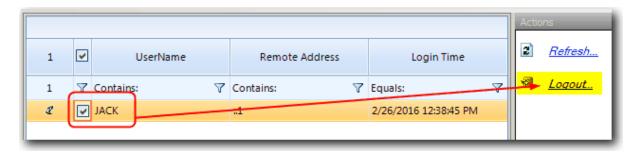
After selecting the **Desktop** node in the **wMobile Explorer** window, double-click the **Logged in Users** icon (shown above) to display a list of users currently logged into wMobile Desktop.

Logging a User Out of wMobile

To log a specific user out of wMobile, place a tick in the checkbox for that user and then click the **Logout** command in the **Actions** window.

4.14   Configuring Email Accounts in wMobile
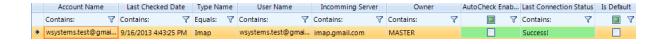
Configuring Email Accounts in wMobile

The wMobile Manager Console allows an administrator to configure and maintain email accounts for all users from one convenient place.

In the **wMobile Explorer** window, click on the **Email Accounts** node to display the email accounts in the main window.
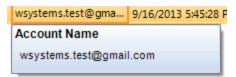
In the grid, you can view all of the defined email accounts and see specific configuration settings, account status, etc.
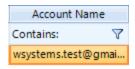
📜 **NOTE**: All the columns are READ-ONLY. To change settings for an email account, you must use the action links available in the **Actions** window.
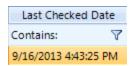
If the text in a grid cell is not fully visible, hover your cursor over the cell and a screen tip will appear with the entire text contents.

The **Account Name** column contains the name of the email account (this is typically a "friendly" name for the email account).

The **Last Checked Date** column contains the last date the **Email Fetcher Service** tried to retrieve the emails for the email account on that row. If the wMobile Email Fetcher Service did not attempt to retrieve email messages for the chosen folders, the displayed value will read: **Never**.
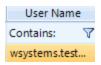
The **Type Name** column contains the type of protocol used by the email server. This will be chosen when creating a new email account and cannot be changed afterword in edit mode.

NOTE: If the account has the wrong protocol set, the account needs to be deleted and a new one created.

The **User Name** column contains the username for the email account used by the login process.
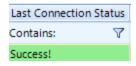
The **Owner** column contains the wMobile user for which the email account was created.
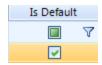
The **Last Connection Status** column displays the message resulting from when an email account is tested. If the account is setup correctly, the background color of the column will be green and the status will read: "Success!"
If there was a problem with the email account this column will explain why the test failed (a common problem is that the email account is not configured correctly) and the background color of the column will be red.
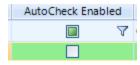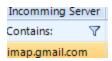
The **Is Default** column contains a tick for the email account set as the default account when more than one email account is configured for any given user (details below).

The **AutoCheck Enabled** column displays the status for the email account being set to automatically retrieve new emails from the email server.

The **Incoming Server** column contains the incoming email server specified to be used for inbound email.

Incomming Server
Contains: ▽
imap.gmail.com

The **Actions** window contains these tools:

New: Create a new email account.
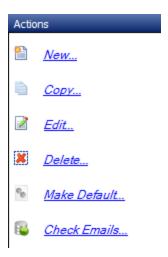
Copy: Duplicate an existing email account.
Edit: Edit an existing email account.
Delete: Delete the selected email account.
Make Default: Sets the selected email account as the default (see details below).
Check Emails: Checks for email messages.

Actions

- New...
- Copy...
- Edit...
- Delete...
- Make Default..
- Check Emails...

Create New Email Account
1. In the **Actions** window, click **New**. This will open the **Account Type Selection** dialog requesting the **Reply Address** and the type of account being configured (POP3 or IMAP).

2. Click the **Continue** button and the **Add Email Account** dialog will display.

3. Enter the appropriate credentials for the email account and click the **Save** button.

Copy Email Account
1. Select the email account you want to duplicate by clicking on it.

2. In the **Actions** window, click **Copy**. This will open the **Duplicate Email Account** dialog.

3. Make the appropriate changes to the existing data for the new email account and click the **Save** button.

Edit Email Account

1. Select the email account you want to edit by clicking on it.

2. In the **Actions** window, click **Edit**. This will open the **Edit Email Account** dialog.

3. Make the appropriate changes and click the **Save** button.

Delete Email Account

1. Select the email account you want to delete by clicking on it.

2. In the **Actions** window, click **Delete**. This will open a prompt asking you if you are sure you want to delete the selected account.

3. Choose **Yes** or **No**.

Make an Email Account the Default

A user may have multiple email accounts within wMobile. Each account saved in wMobile is designated as "owned" by a specific user. When a user has more than one email account, one of these accounts must be set as the "default" account. For outgoing email, wMobile will use the email address from the default account as the "From" address for the user sending the email.

1. Select the email account you want to make the default by clicking on it.

2. In the **Actions** window, click **Make Default**. This will cause the checkbox in the **Default** column of the **Email Accounts** table to be set for the selected account.

Check Emails

For the selected email account, this function is the same as the "Refresh" on wMobile Phone's email list page and "Check Mail" in wMobile Desktop's Email Center.

1. Select the email account you want to check for online email by clicking on it.

2. In the **Actions** window, click **Check Emails**.

See Also:

📄 Adding or Updating Users to wMobile

📄 Configuring User Profiles

4.14.1   Create Email Account in wMobile
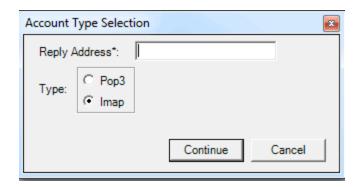
Creating Email Accounts in wMobile Manager Console

wMobile's Manager Console allows an administrator to create new email accounts for all users. This topic provides step-by-step instructions on how to configure your email account using wMobile Manager Console so that you access it using wMobile. You can add and configure email accounts for other users as well. All the settings for an email account and it's email folders can be changed by the user for which you are creating the email account.

In the **Actions** window, click **New.**

The first step in creating a new email account is defining the **Type** of the email account and specifying the reply email address.

Setting a reply-to address:
With wMobile, you can set a reply-to address that's different from your email account username. Responses to messages you send with an alternate reply-to address are delivered to that address.

Reply Address*: [   ]
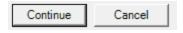
Setting a server type:

POP and IMAP are protocols that enable you to download messages using the wMobile Email Fetcher Service. These downloaded messages come from email servers into your wMobile system so you can access your mail with the wMobile email client program. Chose the protocol from the provided options.

Press **Continue** button.

Type: ○ Pop3
       ● Imap

Press the **Continue** button to specify the rest of the settings for the email account. Press the **Cancel** button to stop the creation of the email account and exit the dialog.

[Continue]   [Cancel]
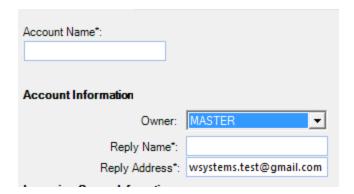
Specify Email Account Settings

> 🗈 **NOTE**: All the fields that have an asterisk (*) at the end of the description are mandatory fields. The email account information will not be saved until these field are completed.
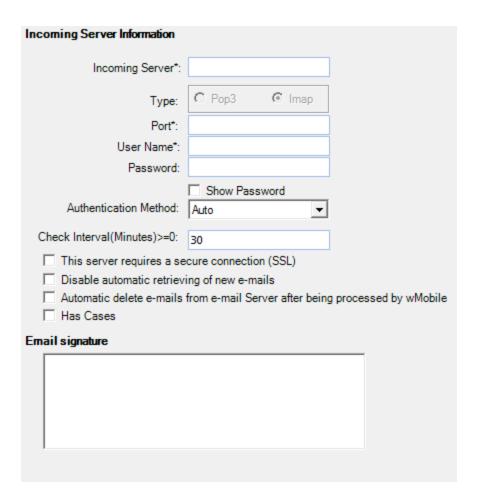
The **Owner** drop-down contains a list of all the users from wMobile and Goldmine. The default value set for this field is the first value within the drop-down. The email account will be available only for the chosen user.

The **Reply Address** is automatically filled with the email address specified at step 1, the value can be changed.

- **Incoming Server:** The address of the incoming email server.
- **Type**: Incoming mail protocol. This is set when the account is first created and cannot be modified.
- **Port**: Represents the server port for incoming email server.
- **User Name**: The user name used for logging into the incoming email server.
- **Password**: The password of the user logging into the incoming email server.
- **Authentication Method**: The method of authentication used by the the incoming email server. Chose an appropriate method from the drop-down.
- **This Server requires a secure connection (TLS/SSL)**: If your incoming mail server requires a secure connection, this checkbox needs to be checked. The wMobile email client will try to use TLS first, but if it's not detected on the server, it will then default to SSL.

- **Check Interval (Minutes):** This value is a time period in which the Email Fetcher Service will scan the email account server for new emails.
- **Disable automatic retrieving of new e-mails**: This option tells the Email Fetcher Service to check for new emails and automatically download them if found in the set interval time. Tick this option ti disable if you do not wish to download new emails automatically.
- **Automatic delete e-mails from e-mail Server after being processed by wMobile:** This option allows Email Fetcher Service to delete the emails from the email server after downloading them.
- **Has Cases:** This option specifies that the email has a case. The Email Fetcher Service will scan every email for cases and if a case id is found within the email "Subject", it will extract the case from the email content. The cases will not be processed for sent folder. Case processing is needed before Filing, because if there is no new case, the email will be filed as history linked to existing case, even if auto filing was disabled.
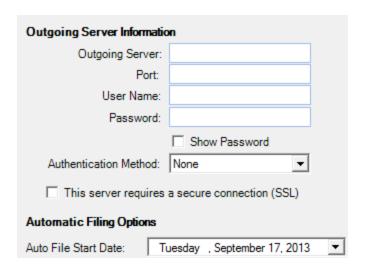
- **Email signature:** This field is used to enter your signature that will be used when sending email.

- **Outgoing Server**: The address of the outgoing email server.
- **Port**: Represents the server port for outgoing email server
- **User Name**: The user name used to login into the outgoing email server.
- **Password**: The password of the user logging into the outgoing email server.
- **Authentication Method**: The method of authentication used by the the incoming email server. Chose an appropriate method from the drop-down.
- **This Server requires a secure connection (SSL)**: If your incoming mail server requires a secure connection, this checkbox needs to be checked.

Automatic Filling Options

Auto File Start Date: This option by default is set to the current date and time. Email Fetcher Service will scan emails with the email date more recent than the chosen date and process them in order to link them to a contact or file them is necessary.

After setting the **Incoming Server Information** and **Outgoing Server Information** you can test the email account by clicking **Test Account**.

Save: Pressing the **Save** button will save the email account and its folders.

Before saving the email account, the settings are tested and the result will be displayed in a window. The email settings will be saved regardless of the testing result.

If the email account uses the POP3 protocol, the email folders that will be saved are **Inbox** and **Sent**. If the email account uses IMAP protocol the email folders will be downloaded based on the Incoming Server Information. If the settings specified for Incoming Server Information are not correct the email folders are not downloaded from the server and therefore will not saved.

Save and Close: This button will execute the steps specified for the Save action and will close the window.

Cancel: The **Cancel** button will discard any change made in the form and those changes will not be saved.
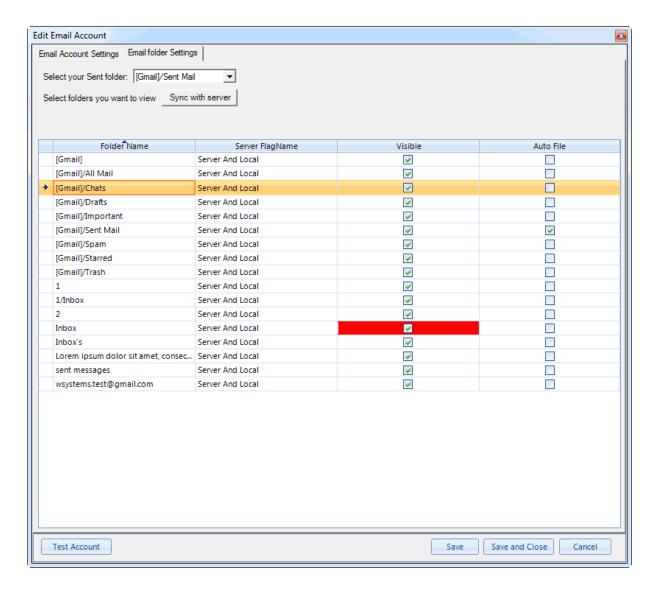
Specify Email Account Folder Settings

If the selected email account protocol is POP3, the email folders will be automatically generated by wMobile Manager Console. The email folders will be visible in the same page as the email account settings and they will be READ-ONLY.

Email Folders
Sent Folder: **Sent**
Inbox Folder: **Inbox**

If the selected email account protocol is IMAP, the email folder settings will be displayed in a separate tab. The email folders will be downloaded from the email server and displayed in a grid. The folders are downloaded when the **Email Folder Settings** tab is clicked. In order to download the email folders for an email account that uses the IMAP protocol, it is necessary to provide the Incoming Server Information.
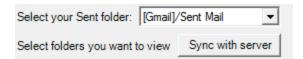
The special email folders: **Inbox** and **Sent** are detected by the wMobile Manager Console. The email folder **Inbox** is marked as **Visible** by default and this property cannot be changed.
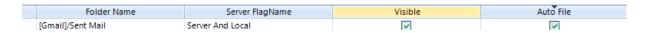
The **Sent** folder is automatically detected by the folder flag set on the email server and the folder name. You can change this setting by selecting a different option from the drop-down.

The available options in the drop-down from which you can choose a sent folder from are the email folders detected on the server excluding the **Inbox** folder.

The option **Sync with server** will download new folders defined on the server and delete the local folders that no longer exist on the email server.

All the folders detected and downloaded from the email server are displayed in the grid. For each folder, you choose to make it **Visible** and/or set it to use **Auto File**. If an email folder is made **Visible**, the user can view its content in the wMobile email client.
If an email folder is set to **Auto File**, the Email Fetcher Service will automatically file email found for that folder.

Folder Name	Server FlagName	Visible	Auto File
[Gmail]/Sent Mail	Server And Local	☑	☑

See also De-Duplication Service.

4.14.2   Configure Email Account Settings
Configure Email Accounts with wMobile Manager Console for wMobile users

Every email account already configured for wMobile users can be maintained using the wMobile Manager Console.
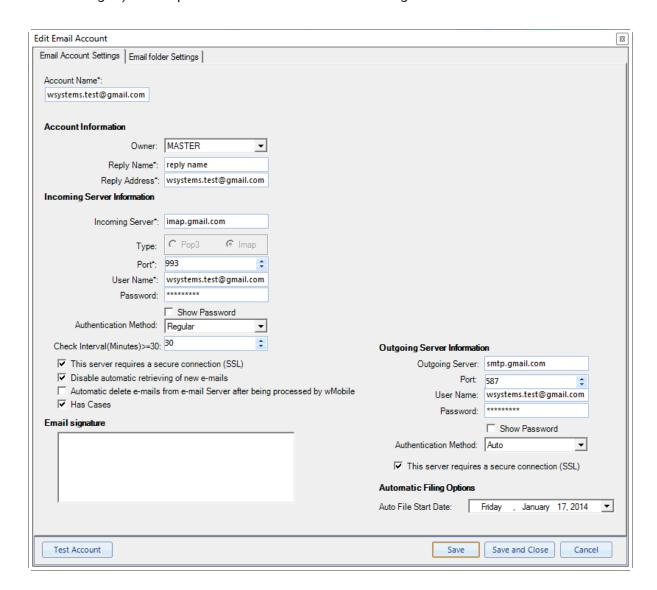
Open wMobile Manager Console. In the **wMobile Explorer** window, click on the **Email Accounts** node to display the email accounts in the main window.

Example of the email account grid:

Account Name	Last Checked Date	Type Name	User Name	Incomming Server	Owner	AutoCheck Enab...	Last Connection Status	Is Default
Contains:	Contains:	Equals:	Contains:	Contains:	Contains:	☐	Contains:	☐
wsystems.test@gmai...	9/16/2013 4:43:25 PM	Imap	wsystems.test@gmai...	imap.gmail.com	MASTER	☐	Success!	☐

To open an email account for editing, select an email account by clicking on it within the grid and then click **Edit** in the **Actions** window (or double-click on an email account to within the grid). This opens the **Edit Email Account** dialog.

All of the email account settings can be edited within this dialog with the exception of the **Type** value (i.e., the mail server protocol: POP3 or IMAP).

See also [Email Archiving Service](#).

4.14.3 Sample Email Account Setup
Example of Creating an Email Account

In this topic we will show the steps to add a new email account.
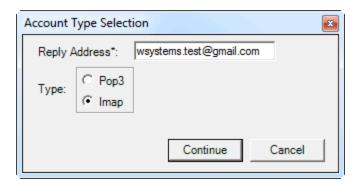
Using wMobile Manager Console, in the **wMobile Explorer** window, click on the **Email Accounts** node.

In the **Actions** window, click **New**.
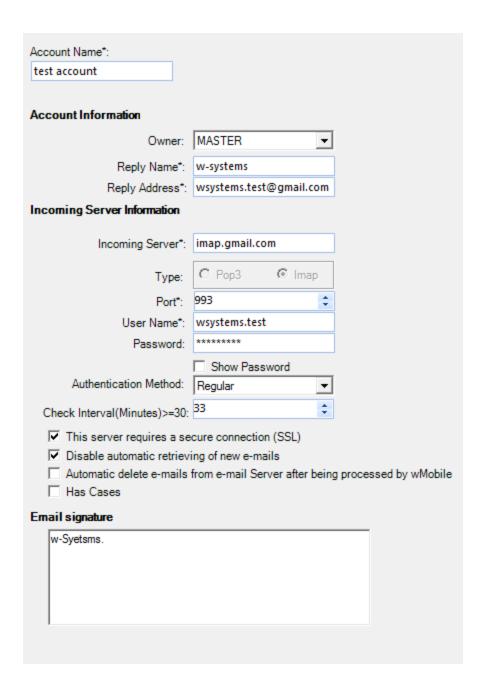
Type the **Reply Address** (an email address) and choose the appropriate protocol for **Type**. For this example, we will choose "IMAP". Click the **Continue** button.
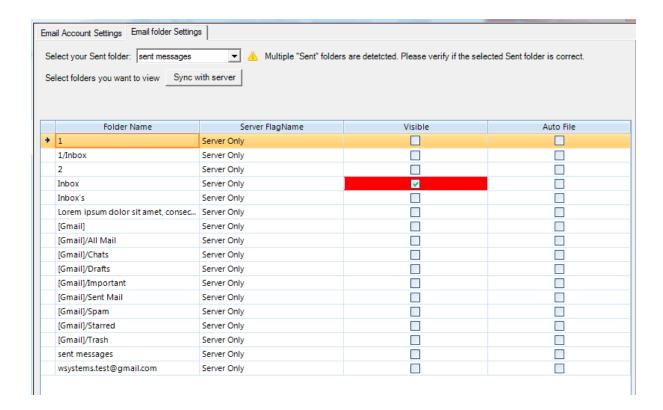
Add the Incoming Server Information in order to download the email server folders.

These example settings apply to a Gmail email account type.
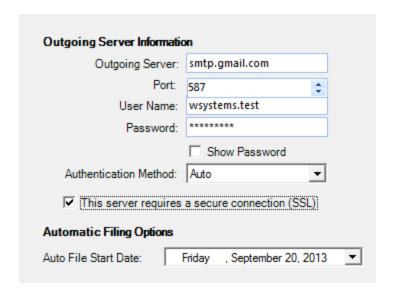
The email folders are downloaded and displayed on the **Email Folder Settings** tab. Multiple "email sent" folders are detected and the last one is chosen by default. You can change this with any of the presented options in the drop-down.
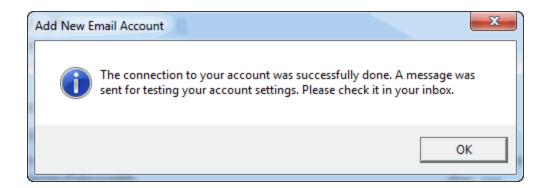
Add the Outgoing Server Information.

These example settings apply to a Gmail email account type.
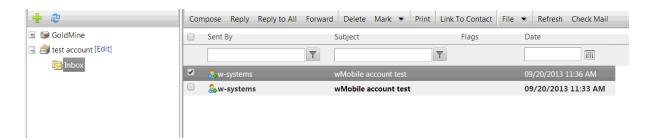
Click the **Test Account** button to test your account settings. A message with the test results will be displayed.

Click the **Save and Close** button and email the account configuration will be saved.

The user for which the email account was created may login to wMobile Desktop and access the Email center. This user was specified in the **Owner** field. In this case it is MASTER.
The email account will appear in the email accounts list. (NOTE: The email account is accessible for the user MASTER in the wMobile Phone edition as well.)
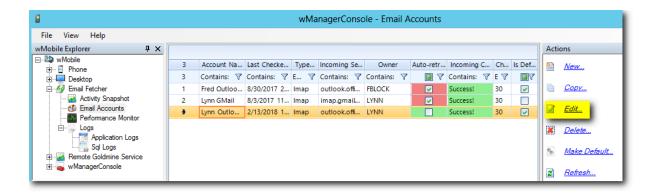
4.14.4 Email Archiving

We all know how much business is conducted via email these days. It's a benefit to be able to archive email in your GoldMine CRM system, so that it's available for later reference. Many of our customers use GoldMine and/or wMobile to send and receive email, so this email is automatically stored in GoldMine History. However, sometimes we find customers that use other email clients such as Lotus Notes, Thunderbird, Zimbra, MacMail or even Outlook without using GoldMine's Outlook integration. Sometimes sales staff will use a native email application on their mobile devices instead of emailing from GoldMine or wMobile. In these cases, the email can be archived automatically by the wMobile Email Fetcher Service. In order to archive both incoming and outgoing mail, the email server must support IMAP connections (not POP3).
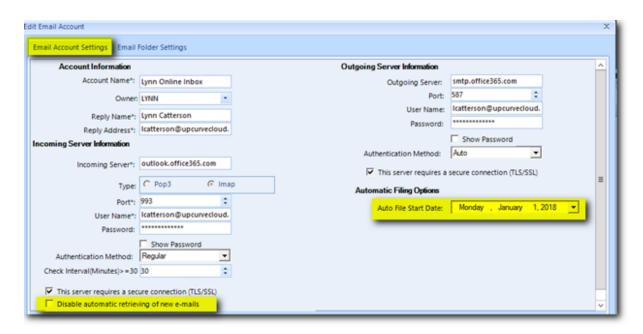
Email archiving can be set up by an administrator or an end-user. We'll review both options. In cases where end-users are using a mix of email clients, including GoldMine and/or wMobile, a de-duplication service can be used to avoid archiving duplicate copies of the same messages.

Email archiving can be set up by an administrator in the wMobile Manager Console on the server where wMobile is installed. These settings would be under the Email Fetcher component in the wMobile Explorer pane on the left. On selecting Email Accounts, you'll see the list of user email accounts configured in wMobile. Highlight an email account and double-click on it or use the Edit option in the Actions menu on the right.
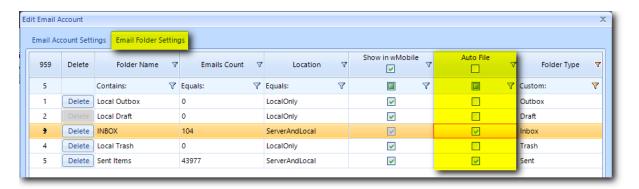
☐ **NOTE**: Email settings are not carried over from GoldMine, so if these aren't configured already, check out the topic on Creating Email Accounts in the wMobile Manager Console.
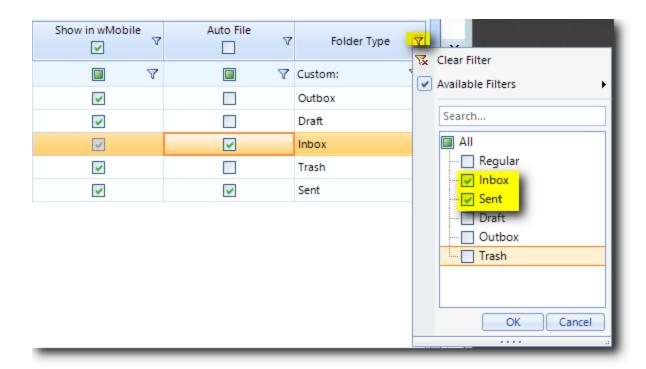
On the Email Account Settings tab, the Auto File Start Date would be selected as highlighted below. The account cannot have automatic retrieving of emails disabled for auto filing (archiving) to take place.

To select individual folders for Auto Filing (archiving), select the Email Folder Settings tab as highlighted below. A list of email folders will appear. Folders such as the Inbox and Sent Items folders can be check-marked in the **Auto File** column. Your own email folders might be named slightly differently based on your mail server, but should be named recognizably as the inbox and sent mail folders.

If you have a long list of folders, you can filter the Folder Type to only show Inbox and Sent folder types. Click on the filter icon in the upper corner of the Folder Type header. Then uncheck any folder types you don't need to see on the list and click **OK**.

When all configurations are completed, select **Save and Close** at the bottom of the window.
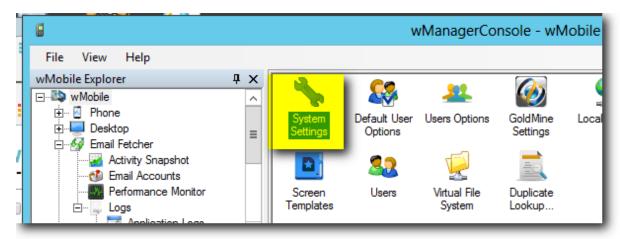
Email archiving can also be set up by a wMobile user in the wMobile Desktop or Phone email preferences.

See also [De-Duplication Service](#).
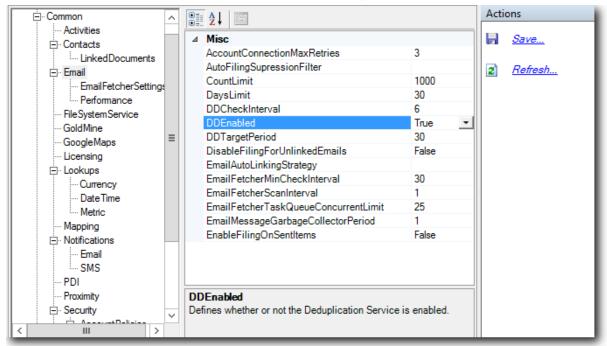
4.14.4.1 De-Duplication Service

If email is sent and received in multiple email clients and email auto filing is in use, there could be duplicate emails archived in GoldMine's History. The wMobile Fetcher Service includes a de-duplication service which remove duplicates based on the MailID.

The email de-duplication service is configured in the wMobile Manager Console System Settings. Select **wMobile** at the top of the wMobile Explorer Pane to include all settings. Double click on **System Settings**.

Navigate to **Configuration > Common > Email** and locate the DDEnabled setting as shown below. This should be set to **True** to enable the DeDuplication service

In System Settings there are some other settings related to Auto Filing such as **CountLimit** and **DaysLimit**. The default settings are 1,000 and 30, by default, but these can be adjusted temporarily if you're trying to archive a larger amount of email. For example, sometimes new wMobile customers will want to archive past email. Be advised that there's no specific limits on these values, but the system will consume higher resources during the period when they've been increased.

4.15   Configure Access to Email Attachments and Linked Documents

In order to access to email attachments and linked documents via wMobile, some configuration is required.

1) If the document paths reference a drive mapping such as `G:\GoldMine\TmpLinks` or `G:\GoldMine\Mailbox\Attach`, then the drive mapping must be added in the wMobile Manager Console, see: Virtual File System Settings.

> 🗒 **NOTE**: In wMobile versions prior to 3.0.2.x this was controlled by using a domain account for the Remote GoldMine Service Account. This is now done in the wMobile Manager Console using the Virtual File System.

4.16   Configuring Security

Security Concepts in wMobile

In this section outline and discuss methods for securing wMobile in the following ways:
- Restricting access to records with Contact Filters for users
  - Ideal for customers who have never used record curtaining
  - Ideal for customers who are accustomed to restricting access to remote laptops

4.16.1   Restricting Accesss to Records with Contact Filters
Restricting Access to Records with Filters

wMobile features the ability to use filters, rather than Ownership, to restrict access to records. This method of record security is ideal for customers who are migrating users who have traditionally used a laptop and have synchronized to get records or for customers that want to limit the records a user or group of users can see without having to implement Record Ownership and Record Curtaining.
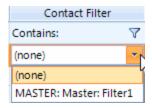
Any filter in GoldMine can be selected; wMobile will recognize public filters and filters owned by any user. Public filters will be listed first followed by the filters of all users, sorted alphabetically by Username, then by filter name.

Configure a User with a Contact Filter to Restrict Access to Records

In the wMobile Manager Console, locate the user in the Users grid.

User Name	Full Name
Contains: ▽	Contains: ▽
ADMINIST	
GUEST	

In the **Contact Filter** column, select the filter that you would like to use to define which records the user will see.

Contact Filter
Contains: ▽
(none)   ▾
(none)
MASTER: Master: Filter1

After making the changes to the user's profile click the **Save** button in the **Actions** window.

Actions

💾 *Save...*

🔁 *Refresh...*

🐤 **CONFIGURATION NOTE**: When updating [User Profile](#) settings, the user must log out and log back in for the changes to take effect.

⚠ **IMPORTANT**: Contact Filters will restrict the access of records regardless of the 'MASTER' setting. For example, if the user is set as a MASTER in wMobile and has a Contact Filter on their profile, they will still only be able to see the records in the Contact Filter.

See Also:

📄 [Adding or Updating Users in wMobile](#)

📄 [Configuring User Profiles](#)

4.16.2   One Click Login Security
One Click Login Security for Phone and Desktop Editions

wMobile offers administrators the ability to control whether users can use the **One Click Login** feature or not in the Phone and/or Desktop editions separately. For more information on configuring and using the **One Click Login** feature, please refer to the topics:
One Click Login for Phone
One Click Login for Desktop
Setup One Click Login for Desktop

Enable / Disable One Click Login for Phone and Desktop Editions

Users can be forced to enter their login credentials each time they want to use wMobile as an added security measure. If your business rule requires this, here is how an administrator can change the setting to enable or disable the usage of One Click Login feature.
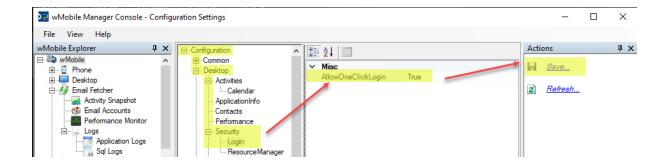
Open wMobile Manager Console and then go into the System Settings.

The **AllowOneClickLogin** setting value controls the use of the **One Click Login** feature.

To edit the **Phone** edition setting, navigate the tree list to get to the following node:
Configuration > Phone > Security > Login

To edit the **Desktop** edition setting, navigate the tree list to get to the following node:
Configuration > Desktop > Security > Login

Example of configuring **AllowOneClickLogin** for the Desktop users:

With **Login** selected for either edition, you will see **AllowOneClickLogin** in the main window. This value defines whether or not users can setup **One Click Login**. Set this to **True** to allow this feature or set to **False** to disable this feature.

After making the changes to these settings, click **Save** in the **Actions** window (restarting components will be required; a prompt will appear after clicking "Save").

4.17   Customizing wMobile Phone Edition

wMobile Phone Edition can be customized in a variety of ways:
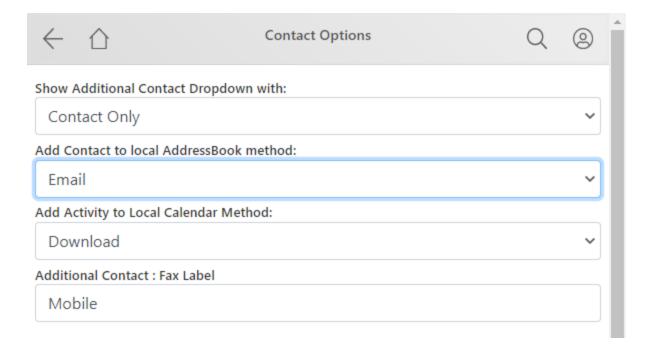
📄 Customizing the Home Menu
📄 Customizing Lookup Options
📄 wMobile Phone AddIn Configuration

This documentation assumes you have some familiarity with GoldMine database structure and the ability to identify GoldMine field names. If assistance is needed for customization, please contact your wMobile reseller or wMobile support.

4.17.1   Configuring Option to Add to Local Address Book
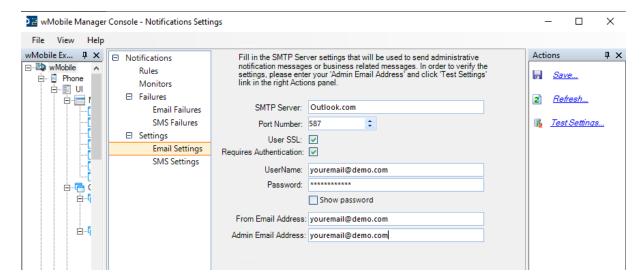
Steps for setting the method (**Download** or **Email**) used by wMobile to add a contact to your device:

1. From the Home page, open the Side Menu, click on **My Preferences > Contact Options**. Select **Email** or **Download** from the **Add Contact to Local Address Book Method** drop-down.

2. If your device requires using the **Email** method, you will need to configure the **Notification Service Settings**.

- Open the [wMobile Manager Console](#).
- Select the **wMobile** node in the **wMobile Explorer** window and then double-click the **Notification Service Settings** icon in the main window to display the SMTP Server settings.
- Enter your SMTP Server information to be used for sending the contact information via email.
- Click **Save** in the **Actions** window to save the settings.

> 🖫 **NOTE**: You may optionally use Test Settings in the Actions window to test that your settings were configured successfully.

4.17.2 Customizing the Home Menu

wMobile Phone edition's <u>Home</u> menu can be customized to suit the needs of your end users. These customizations are made using the <u>wMobile Manager Console</u>. By <u>hiding and/or showing</u> items on the <u>Home</u> menu, users may experience less scrolling in order to access specific items on the menu. Further, the most useful items needed can be available with minimal clicks. New items can be added onto the Home menu as shortcuts to common tasks.

See Also:

📄 <u>Hide/Show Home Menu items</u>

📄 <u>Delete Menu item</u>

📄 <u>Add New Home Menu Shortcut</u>

📄 <u>Setting Sort Order on Home Menu</u>

4.17.2.1 Hide/Show Home Menu Items

Menu items can be configured to be displayed or hidden on the Home menu using the **Mobile Menu Designer**.

Accessing the Mobile Menu Designer

In the **wMobile Explorer** window, navigate to: **wMobile > Phone > UI > Menus**, and then select **HomeMenu**.

In the main window you will find the **Mobile Menu Designer** containing the menu layout. Within the layout:

- Items that appear in <u>blue</u> will be displayed on the wMobile <u>Home</u> menu.
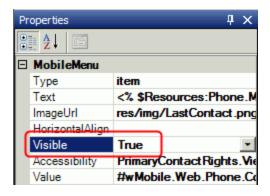
- Items that appear *italicized and gray* will not be displayed on the wMobile Home menu.

Hiding / Showing Items in the Menu

- To hide a menu item, select it from the list in the **Mobile Menu Designer**.
- In the **Properties** window, change the **Visible** status from **True** to **False** using the drop-down list.
- Likewise, to show an item that is currently hidden, select it in the **Mobile Menu Designer** and then change the **Visible** property to **True**.

Click **Save** in the **Actions** window to save any changes that were made.

The changes will appear in wMobile after a page refresh or after a user logs out and then logs back into wMobile.

For changing the order of Home menu items, please see the topic: Sort Order on the Home menu.

4.17.2.2 Delete Menu Item

Menu items can be stopped from displaying on the Home menu using two methods: (1) hiding the item; or (2) removing the item.

Remove an item by highlighting it and then clicking **Remove Menu Item** in the **Actions** window.

⚠ **IMPORTANT**:

> - Unless you are sure the menu item will not be needed again, it is highly recommended that the item is [hidden](#) rather than deleting it completely.
> - There is no option to restore deleted menu items, they would need to be recreated manually or a **Restore Default** command may be executed causing all customizations to be lost.

NOTE: There is no option to restore deleted menu items, they would need to be recreated manually.

4.17.2.3 Add New Home Menu Shortcut

New items can be added to the Home menu using the **Mobile Menu Designer**.
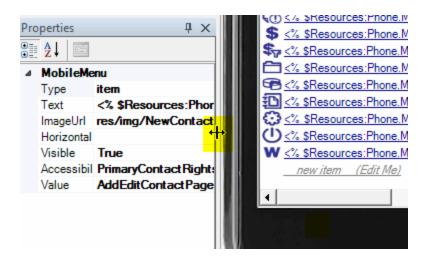
In the **wMobile Explorer** window, navigate to: **wMobile > Phone > UI > Menus**, and then select **HomeMenu**.

At the bottom of the phone's screen, in the main window, click _**new item (Edit Me)**_.
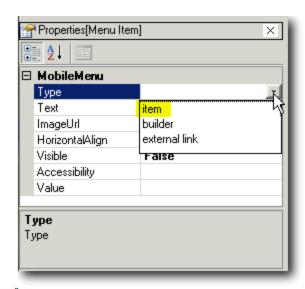
For this example, we'll add a menu option to show "**This Week's Appointments**".

You can use the splitter bar to adjust the tool window sizes so you can see the **Properties** window more easily. Put your cursor over the splitter bar, and then click-and-drag it to a usable width.
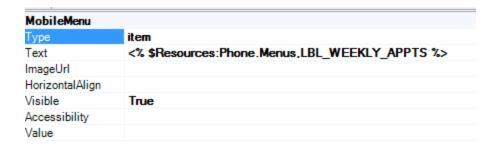
Select "**item**" as the **Type** from the drop-down list in the **Properties** box.

Enter **Text** as you would like the option to appear on the Home menu. In this example, the **Text** will be entered as:

```
<% $Resources:Phone.Menus,LBL_WEEKLY_APPTS %>
```

The L**BL_WEEKLY_APPTS** is the Resource Id and the value will be "This Week's Appointments". This information needs to be inserted in the database for **Localization** and is discussed below.

Click in the **ImageURL** field and then click the browse button to display the **Select ImageUrl** dialog. Use this dialog to select an image icon to be used for the menu item.

> 📄 **NOTE**: A number of icons are provided in the `wMobilePhone\res\img` folder.
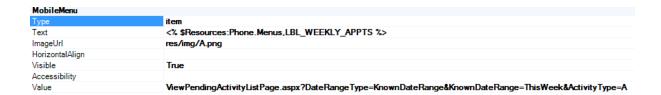
It is possible to add and use custom icons, but note that the icons provided are formatted consistently so they download quickly. If you use your own, they must be formatted with the same size and type as the existing collection icons.

Set the **Visible** status to **True**.

Add the **Value** text as:

```
ViewPendingActivityListPage.aspx?DateRangeType=KnownDateRange&KnownDateRange=ThisWeek&ActivityType
```


You can copy the **Value** from another menu item and edit it accordingly. The following time-frame and activity types cam be used:

Time-frame values:
LastMonth
LastWeek
Yesterday
Today
Tomorrow
ThisWeek
ThisMonth
ThisQuarter
NextMonth
NextWeek
NextQuarter
Next30Days
Next14Days
Next31_60Days
Next61_90Days
PastDue
PastDueAndToday

GoldMine activity types:
A - Appointments
C - Calls
S - Sales
T - Next Actions
O - Other Actions

Click **Save** in the **Actions** window to save any changes that were made.

wMobile must be restarted for this type of change to take effect.

Click the **wMobile > Phone** node in **wMobile Explorer** window.
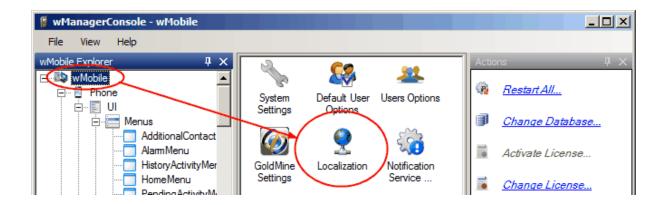
In the **Actions** window, click **Restart**.
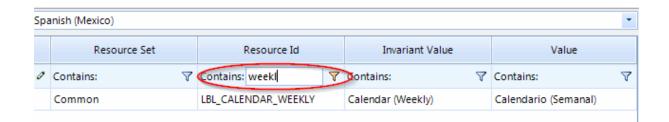
A translation needs to be added for the newly added menu item. This is done through the wMobile Manager Console **Localization** feature.

To access the **Localization** icon, click on the **wMobile** node found in the **wMobile Explorer** window.

Double-click the **Localization** icon to open the editor in the center window.

All the resources are loaded into the grid. Search for the Resource Id: L**BL_WEEKLY_APPTS**. The Resource Id is not loaded yet.

Click **Update Dynamic Resources** in the **Actions** window. The phone menu item you added will be extracted and merged with the current resources.
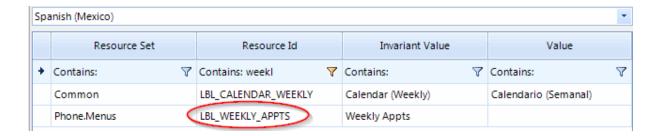
The Resource Id will appear in the center window. The **Resource Id** and **Resource Set** fields are READ-ONLY.

The **Invariant Value** field contains text that is automatically generated based on the specified **Resource Id**.

You can modify the **Invariant Value** (i.e., the text that is displayed in wMobile) and also translate the menu item in Spanish by adding the appropriate translation text in the **Value** field.

These values are saved automatically when you click away from the field you edited.

The new item will appear at the bottom of the Home menu:

For changing the order of Home menu items, please see the topic: Sort Order on the Home menu.

4.17.2.4   Sort Order on Home Menu

Items on the Home menu can be sorted to meet your needs.
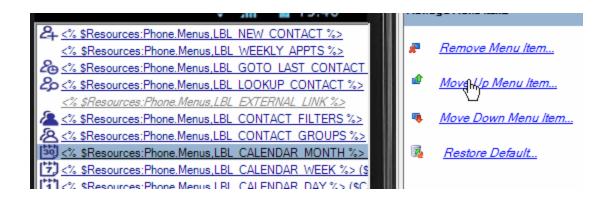
Highlight the menu item to be moved in the **Mobile Menu Designer**.

Use the **Move Down Menu Item** command in the **Actions** window to move the menu item lower on the list.

Highlight the menu item to be moved in the **Mobile Menu Designer**.

Use the **Move Up Menu** Item command in the **Actions** window to move the menu item higher on the list.

Click **Save** in the **Actions** window to save any changes that were made.

The changes will appear in wMobile after a page refresh or after a user logs out and then logs back into wMobile.

4.17.3 Customizing Contact Screens

wMobile allows simple customizations of your Contact Screens that were initially created and configured in GoldMine. Of all the fields displayed within a specific Contact Screen while working in GoldMine, not all of them are needed by users working remotely with wMobile. These instructions explain how to modify the Contact Screens to fit the specific needs of your users, enabling them to see only what is necessary. On small devices this is a great benefit as fields can be removed from the screen and the order of existing fields can be changed.

In order to be able to see and use custom Contacts Screens in wMobile, Record Types must be enabled. To enable Record Types, please see the <u>EnableRecordTypes</u> setting in the topic: <u>Configuring wMobile System Settings</u>.
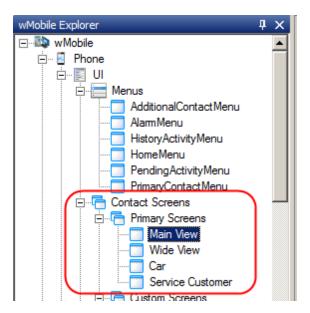
Once you have enabled Record Types for the Phone Edition, check the contact view. If the field you are looking for is already on the Contact Screen in GoldMine, then it should automatically appear in the contact screen in the Phone edition as well. You only need to add a field in GoldMine if that field is not on the contact screen in wMobile and you wish

to see it there. wMobile reads the GoldMine database for this information (fields cannot be added to contact screens from within wMobile Manager Console).
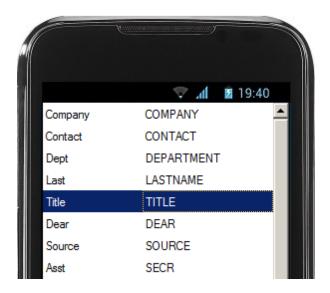
With EnableRecordTypes set to False, wMobile will use the company, contact, address fields, phone fields, email address, website, and key fields.

Open the wMobile Manager Console. In the **wMobile Explorer** window, navigate to: **wMobile > Phone > UI > Contact Screens**. Under this node are the screens you can customize. In this example, you see: *Main View*, *Wide View*, *Car*, and *Service Customer*.
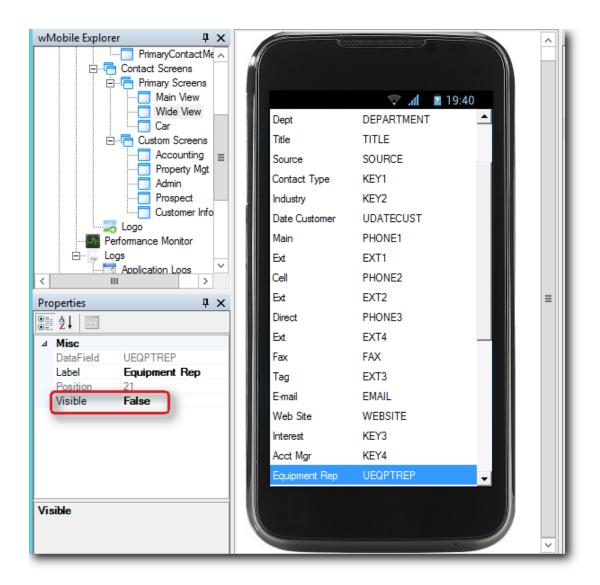
Click on a screen name to select it and have it display in the center window.

In the center window, select the screen field you would like to perform an action on by clicking on it. Your choices are: **Remove Screen Field**, **Move Up Screen Field**, or **Move Down Screen Field**.
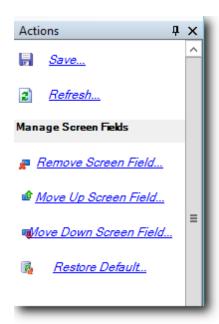
It is also possible to 'hide' a field from view. Select the field in the list. Set the Visible settings as shown below to '**False**.'

The **Actions** window contains the commands to perform on the selected screen field. After making your edits to a screen, click **Save**.

Actions

Save: Save changes made to the screen.
Refresh: Refresh the screen.
Remove Screen Field: Remove the field from the screen. [NOTE: This does not affect the screen in GoldMine; only the display in wMobile. If you remove a screen field and need it to display again, you will need to use the **Restore Default** action (see below). It is recommended to set the Visible setting to False, rather than removing the field.]
Move Up Screen Field: This action moves the selected field "up" within the list.
Move Down Screen Field: This action moves the selected field "down" within the list.
Restore Default: Restores the screen to its original configuration (as it is in GoldMine). All customizations done in wMobile for the currently selected screen will be lost. Use this action if you need to re-do a screen customization from the beginning.
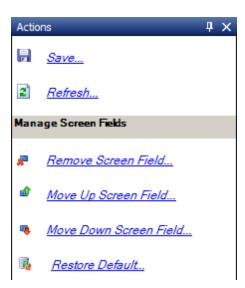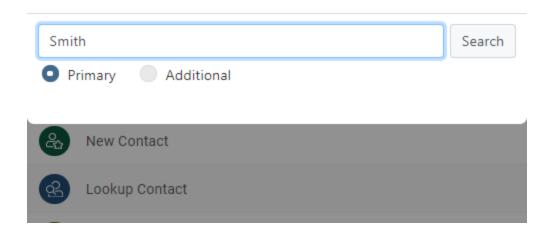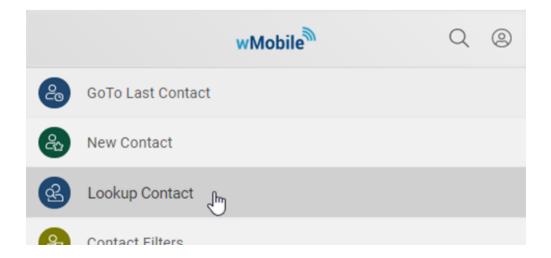
4.17.4 Customizing Lookup Options

wMobile has two options to help users search for contacts.
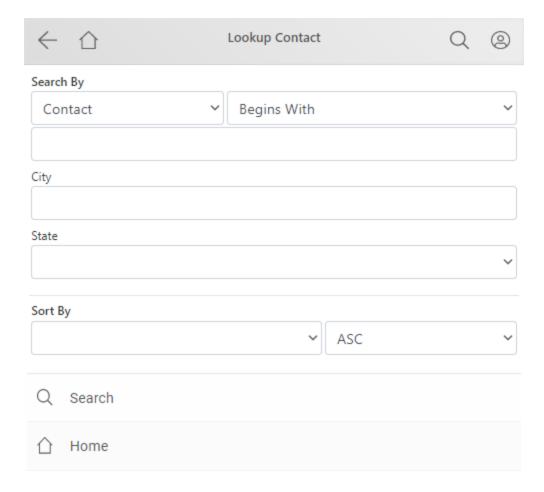
The first option is **Quick Search** which is located at the top of the wMobile Home Menu. Using the default search fields, a wMobile user can enter part of a company name, contact name, or city. By default, wMobile already has a three search fields configured but allows its users to modify their searching capability by adding and/or removing Quick Search fields. For instructions on customizing these search options, see the topic: Customizing Quick Search Fields.

The second option is the **Lookup Contact** item on the Home Menu.

By default, the **Lookup Contact** option includes five search fields. To get the list of these fields and to add or remove fields to be searched, see the topic: Customizing Lookup Contact Fields.
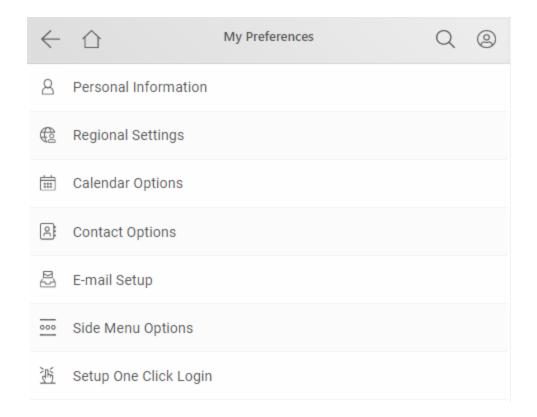
The fields displayed in the "results" received after a search is performed using **Quick Search** or **Lookup Contact** may also be customized to meet your needs. To learn about customizing the results, see the topic: Customizing List View Results.

> 📰 **NOTE**: It is possible to edit these scripts while users are logged into wMobile. However, be aware that if you make a mistake, it could cause the users to get errors and not be able to view the respective pages. wMobile does not need to be restarted to display these customizations. Saving the script and doing a screen refresh in wMobile is all that is needed.

4.17.4.1 Customizing Quick Search Fields
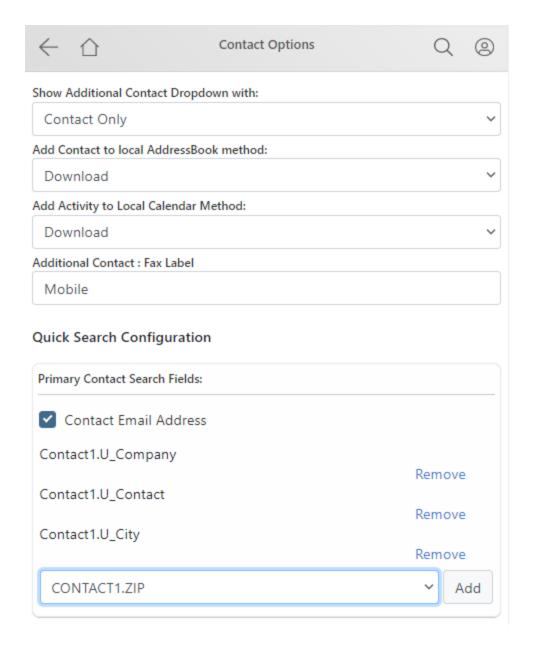
By default, the Quick Search includes the Company, Contact and City fields. Users can edit their own Quick Search fields in the wMobile Phone **My Preferences**. These modifications are saved on a per user basis meaning that users will have their own individual search fields selected to be used when searching for contacts. One user may prefer using a specific phone number field while another may prefer the company or contact's name. The Quick Search fields can also include GoldMine user-defined fields which help to provide many searching choices.

Select **My Preferences** from the Home Menu. Then select **Contact Options** as highlighted on the left.
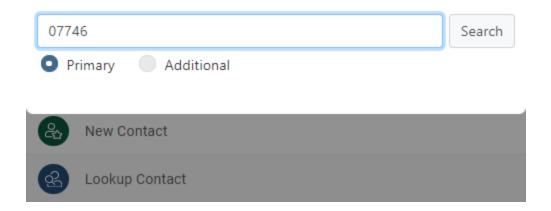
Select a **Primary Search Configuration** field from the drop-down list. In this example, postal code (Contact1.ZIP) will be added. After selecting the item in the drop-down, click the **Add** button to include this field in the Quick Search. There is no limit to the number of fields you can add but please be aware: the more fields you add, the more that need to be searched, and the longer the results will take to be displayed.
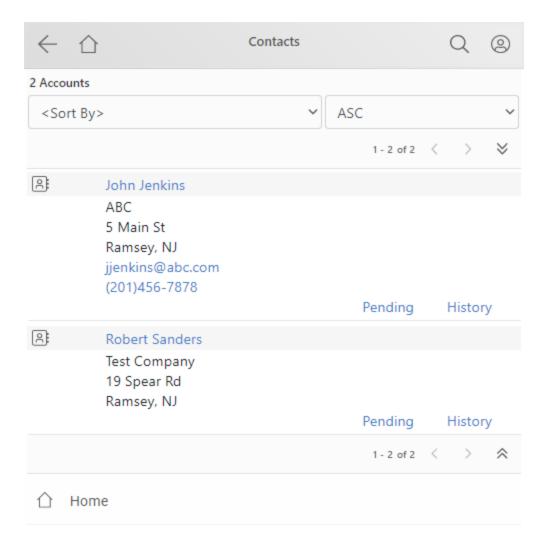
Click **Save** to save your changes.

To test the results in wMobile, enter search criteria into the Quick Search field:

07746   Search

⦿ Primary   ◯ Additional

New Contact

Lookup Contact

The matching contacts will be displayed. If additional fields would be helpful in the results list, see the topic: Customizing List View Results.

Contacts

2 Accounts

\<Sort By\>   ASC

1 - 2 of 2   \<   \>   ⌄

John Jenkins
ABC
5 Main St
Ramsey, NJ
jjenkins@abc.com
(201)456-7878
                              Pending   History

Robert Sanders
Test Company
19 Spear Rd
Ramsey, NJ
                              Pending   History

1 - 2 of 2   \<   \>   ⌃

Home

If additional fields would be helpful in the results list, see the section on <u>Customizing List View Results.</u>
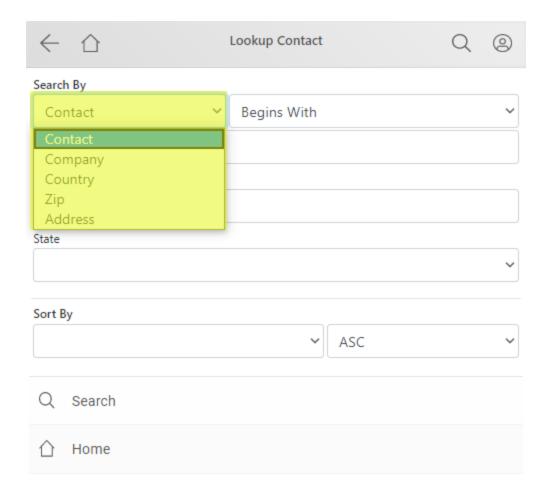
Administrators can also set Quick Search fields for all users in <u>Default Users Options</u>.

4.17.4.2 Customizing Lookup Contact Fields

By default, the Lookup Contact option includes the **Contact** name, **Company** name, **Country**, **Zip**, and **Address**. The field choices to be selected for searching can be customized by editing the **LookupContact.xml** located in the following folder (typical location):

```
C:\Program Files\W-Systems\wMobilePhone\conf\UI\CustomForms
```

Drop-down containing search fields:

Adding a Lookup Contact Field:

Perhaps you'd like to add the ability to search for the "Department". In this example, the GoldMine Department field has been added as a search criteria.

For this example, Notepad has been used to open the XML (you may use a different editor; see: TIP (Editing XML Files) for more information). Changes made to the file appear in bold blue text.

The easiest way to add a field is to copy a line and edit it accordingly. Copy an existing line and then edit the **LookupField Name** and **Title** values as shown in blue. Add this new line into the file:

```
<LookupField Name="Dept:" Title="&lt;% $Resources:Common,LBL_DEPARTMENT %&gt;" />
```
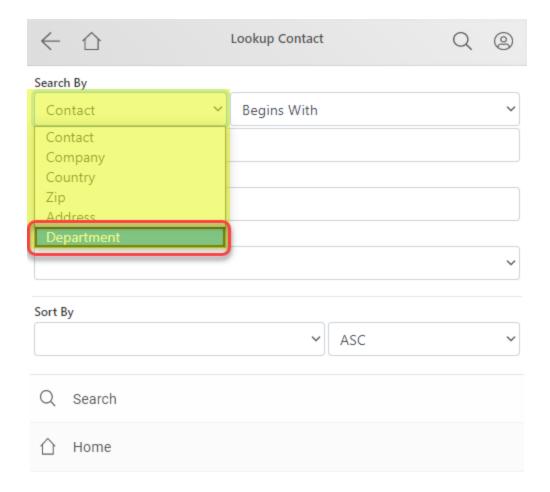
Example showing new line added after "Address1":

```
<MobileForm.Configuration>
     <LookupFields>
           <LookupField Name="Contact"  Title="&lt;% $Resources:Common,LBL_CONTACT
           <LookupField Name="Company" Title="&lt;% $Resources:Common,LBL_COMPANY
           <LookupField Name="Country" Title="&lt;% $Resources:Common,LBL_COUNTRY
           <LookupField Name="Zip" Title="&lt;% $Resources:Common,LBL_ZIP %&gt;" /
           <LookupField Name="Address1" Title="&lt;% $Resources:Common,LBL_ADDRESS
           <LookupField Name="Dept:" Title="&lt;% $Resources:Common,LBL_DEPARTMENT
           <!-- Use GoldMine label
           <LookupField Name="Country" -->

     </LookupFields>
     <LookupOperators>
           <LookupOperator Name="BeginsWith" Title="&lt;% $Resources:Common,LBL_BE
           <LookupOperator Name="EndsWith" Title="&lt;% $Resources:Common,LBL_ENDS
           <LookupOperator Name="Contains" Title="&lt;% $Resources:Common,LBL_CONT
           <LookupOperator Name="EqualTo" Title="&lt;% $Resources:Common,LBL_EQUAL
           <LookupOperator Name="NotEqualTo" Title="&lt;% $Resources:Common,LBL_NO
           <LookupOperator Name="GreaterThan" Title="&lt;% $Resources:Common,LBL_G
           <LookupOperator Name="LessThan" Title="&lt;% $Resources:Common,LBL_LESS
           <LookupOperator Name="GreaterThanOrEqualTo" Title="&lt;% $Resources:Com
           <LookupOperator Name="LessThanOrEqualTo" Title="&lt;% $Resources:Common
     </LookupOperators>
</MobileForm.Configuration>
```

Once editing is complete, save the changes made to the **LookupContact.xml** file and test in wMobile to see that the field displays.

Example showing the "Department" field in the drop-down:
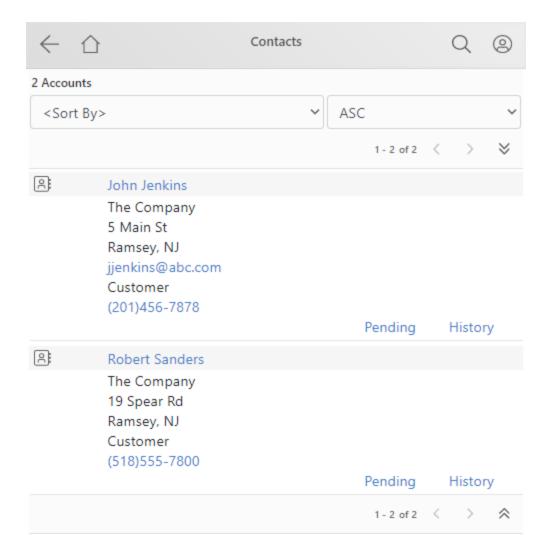
If additional fields would be helpful in the results list, see the section on Customizing List View Results.

4.17.4.3 Customizing List View Results

When searching for records in wMobile using the **Quick Search** or **Lookup Contact** options, the results will be displayed in a List View. There is a default group of fields that will contain the data returned by a search: Contact, Company, Address1, CityState, EmailAddress, Phone1, Ext1, and Key1. The order of the search result fields displayed in the List View is configurable, see details below.

Results in the List View shown with the default fields:

Based on your specific needs, it may be helpful to include additional fields in the List View results.

An administrator can add additional fields by editing the **ContactListStyle.xml** file located in the following folder on the wMobile server (typical location):

`C:\Program Files\W-Systems\wMobilePhone\conf\UI\ListViewStyles`

> 📄 **NOTE**: The **ContactListStyle.xml** file is copied to the server during the initial wMobile installation but not during wMobile updates. This prevents customizations made to this file from being overwritten with subsequent wMobile updates.

> ⚠️ **IMPORTANT**: It is recommended that a backup copy of the **ContactListSyle.xml** file is made before editing the original. The backup copy may be used for reference or as a restore point if needed.

In the following customization example, the **Industry** (i.e., KEY2) and **Source** (i.e., SOURCE) fields will be added to the List View results.

Open the **ContactListSyle.xml** file. You can use Notepad to open XML files (you may use a different editor.

> 💡 **TIP (Editing XML Files)**: To edit XML files you can use the Notepad application that ships with Windows but most text editors could be used such as Microsoft Visual Studio or Notepad++. Please note that some text editors directly support editing XML files. This support is beneficial because the editors can color code the text aiding in the editing of XML files.

The modifications to the original file are shown in the following listing in blue. Two sections of this file need to be edited. One section is between the **<Columns>** and **</Columns>** tags and the other section is between the **<ItemLayout>** and **</ItemLayout>** tags (shown in red).

```
<?xml version="1.0" encoding="utf-8"?>
<ListView>
  <Columns>
    <ImageColumn Name="ContactImage" ImageUrl="res/img/Contact.png" />
    <LinkButtonColumn Name="Contact" Title="Contact" DataField="Contact" CommandName=
    <TextColumn Name="Company" Title="Company" DataField="Company" EmptyText="N/A" />
    <TextColumn Name="Address1" Title="Address1" DataField="Address1" EmptyText="N/A"
    <TextColumn Name="CityState" Title="CityState" DataField="CityState" EmptyText="N
    <LinkButtonColumn Name="EmailAddress" Title="Email" DataField="EmailAddress" Comm
    <PhoneLinkColumn Name="Phone1" Title="Phone" DataField="Phone1" />
    <TextColumn Name="Ext1" Title="Ext1" DataField="Ext1" />
    <LinkButtonColumn Name="Pending" Text="&lt;% $Resources:Phone.ListViews,LBL_PENDI
    <LinkButtonColumn Name="History" Text="&lt;% $Resources:Phone.ListViews,LBL_HISTO
    <TextColumn Name="Key1" Title="Key1" DataField="Key1" EmptyText="N/A" />
    <TextColumn Name="Key2" Title="Key2" DataField="Key2" EmptyText="N/A" />
    <TextColumn Name="source" Title="source" DataField="source" EmptyText="N/A" />

  </Columns>
  <ItemLayout>
    <RowLayout BackColor="SkyBlue">
      <CellLayout HorizontalAlign="Left" ColumnLayout="0" />
      <CellLayout HorizontalAlign="Left" ColumnLayout="1" />
```

```
       </RowLayout>
       <RowLayout>
         <CellLayout HorizontalAlign="Left" ColumnLayout="" />
         <CellLayout HorizontalAlign="Left" ColumnLayout="2" />
       </RowLayout>
           <RowLayout>
                 <CellLayout HorizontalAlign="Left" ColumnLayout="" />
                 <CellLayout HorizontalAlign="Left" ColumnLayout="3" />
           </RowLayout>
           <RowLayout>
         <CellLayout HorizontalAlign="Left" ColumnLayout="" />
         <CellLayout HorizontalAlign="Left" ColumnLayout="4" />
       </RowLayout>
       <RowLayout>
         <CellLayout HorizontalAlign="Left" ColumnLayout="" />
         <CellLayout HorizontalAlign="Left" ColumnLayout="5" />
       </RowLayout>
         <RowLayout>
                 <CellLayout HorizontalAlign="Left" ColumnLayout="" />
                 <CellLayout HorizontalAlign="Left" ColumnLayout="10" />
         </RowLayout>
         <RowLayout>
                 <CellLayout HorizontalAlign="Left" ColumnLayout="" />
                 <CellLayout HorizontalAlign="Left" ColumnLayout="11" />
         </RowLayout>
         <RowLayout>
                 <CellLayout HorizontalAlign="Left" ColumnLayout="" />
                 <CellLayout HorizontalAlign="Left" ColumnLayout="12" />
         </RowLayout>

           <RowLayout>
         <CellLayout HorizontalAlign="Left" ColumnLayout="" />
         <CellLayout HorizontalAlign="Left" ColumnLayout="6; ;7" />
       </RowLayout>
       <RowLayout>
         <CellLayout ColumnSpan="2" HorizontalAlign="Right" ColumnLayout="8; ;9;&lt;hr s
       </RowLayout>
     </ItemLayout>
   </ListView>
```

Add the columns to the **<Columns></Columns>** section:

The easiest way to add an item is to make a copy of an existing line and customize the copied line accordingly. After inserting the two new lines for this example, update the **TextColumn Name**, **Title**, and **DataField** values (shown in blue) to be the field names to be displayed:

```
<TextColumn Name="Key2" Title="Key2" DataField="Key2" EmptyText="N/A" />
<TextColumn Name="source" Title="source" DataField="source" EmptyText="N/A" />
```

Now these items must also be added to the **<ItemLayout></ItemLayout>** section for them to be displayed.

Before customizing the **ItemLayout** section, it's worth noting that there are two methods of setting the column order in the List View that displays search results: (1) using "index numbers" and (2) using "column names". Each item to be displayed must be included in the list of columns found between the **<Columns>** and **</Columns>** tags in the **ContactListSyle.xml** file.

1. Using Index Numbers:

In the following listing, the column numbers shown in red were added for reference only and are not in the actual file. They are here to show that the items are depicted as numbered sequentially from top to bottom starting with index "0". These index numbers can be used to set the position of the items in the List View. While this is a viable option, you may find using "column names" easier and more "readable".

```
    <Columns>
 0    <ImageColumn Name="ContactImage" ImageUrl="res/img/Contact.png" />
 1    <LinkButtonColumn Name="Contact" Title="Contact" DataField="Contact" CommandName=
 2    <TextColumn Name="Company" Title="Company" DataField="Company" EmptyText="N/A" />
 3    <TextColumn Name="Address1" Title="Address1" DataField="Address1" EmptyText="N/A"
 4    <TextColumn Name="CityState" Title="CityState" DataField="CityState" EmptyText="N
 5    <LinkButtonColumn Name="EmailAddress" Title="Email" DataField="EmailAddress" Comm
 6    <PhoneLinkColumn Name="Phone1" Title="Phone" DataField="Phone1" />
 7    <TextColumn Name="Ext1" Title="Ext1" DataField="Ext1" />
 8    <LinkButtonColumn Name="Pending" Text="&lt;% $Resources:Phone.ListViews,LBL_PENDI
 9    <LinkButtonColumn Name="History" Text="&lt;% $Resources:Phone.ListViews,LBL_HISTO
10    <TextColumn Name="Key1" Title="Key1" DataField="Key1" EmptyText="N/A" />
11    <TextColumn Name="Key2" Title="Key2" DataField="Key2" EmptyText="N/A" />
12    <TextColumn Name="source" Title="source" DataField="source" EmptyText="N/A" />
    </Columns>
```

2. Using Column Names:

The following listing is the same column list as the prior one but without the index numbers being shown. In this listing, the red text is highlighting the column "Name" values needed for setting the column order in the List View (i.e., the "**Name**" value):

```
<Columns>
   <ImageColumn Name="ContactImage" ImageUrl="res/img/contact.gif" />
   <LinkButtonColumn Name="Contact" Title="Contact" DataField="Contact" CommandName="
   <TextColumn Name="Company" Title="Company" DataField="Company" EmptyText="N/A" />
```

```
    <TextColumn Name="Address1" Title="Address1" DataField="Address1" EmptyText="N/A"
    <TextColumn Name="CityState" Title="CityState" DataField="CityState" EmptyText="N/
    <LinkButtonColumn Name="EmailAddress" Title="Email" DataField="EmailAddress" Comma
    <PhoneLinkColumn Name="Phone1" Title="Phone" DataField="Phone1" />
    <TextColumn Name="Ext1" Title="Ext1" DataField="Ext1" />
    <LinkButtonColumn Name="Pending" Text="Pending" Title="Pending" CommandName="Pendi
    <LinkButtonColumn Name="History" Text="History" Title="History" CommandName="Histo
    <TextColumn Name="Key1" Title="Contact Type" DataField="Key1" EmptyText="N/A" />
    <TextColumn Name="Key2" Title="Key2" DataField="Key2" EmptyText="N/A" />
    <TextColumn Name="Source" Title="Source" DataField="Source" EmptyText="N/A" />
</Columns>
```

Again, copy another set of lines beginning with **<RowLayout>** and **</RowLayout>** tags and paste them where they should appear in the resulting List View, in this example, after the KEY1 (having ColumnLayout = 10).

1. Using Index Numbers:

```
<RowLayout>
    <CellLayout HorizontalAlign="Left" ColumnLayout="" />
    <CellLayout HorizontalAlign="Left" ColumnLayout="11" />
</RowLayout>

<RowLayout>
    <CellLayout HorizontalAlign="Left" ColumnLayout="" />
    <CellLayout HorizontalAlign="Left" ColumnLayout="12" />
</RowLayout>
```
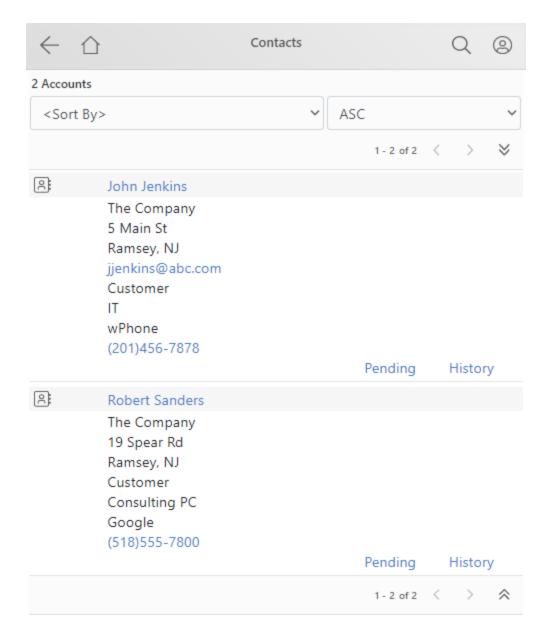
2. Using Column Names:

As you'll see here, using the "names" instead of the "index numbers" allows you to easily identify the positioning of the items you are placing in the layout without having to know which index number is related to the column you are working with.

```
<RowLayout>
    <CellLayout HorizontalAlign="Left" ColumnLayout="" />
    <CellLayout HorizontalAlign="Left" ColumnLayout="Key2" />
</RowLayout>

<RowLayout>
    <CellLayout HorizontalAlign="Left" ColumnLayout="" />
    <CellLayout HorizontalAlign="Left" ColumnLayout="source" />
</RowLayout>
```

When all editing is complete, save the changes made to the **ContactListView.xml** file. Now test your the updated List View by running a **Quick Search** or **Lookup Contact** search in wMobile Phone to see the new fields in the results list.

> 📖 **NOTE**: Fields in the List View results that do not contain data are not displayed. wMobile Phone Edition is designed for use on a handheld devices and does not display empty fields to minimize scrolling.

Example of updated List View layout:
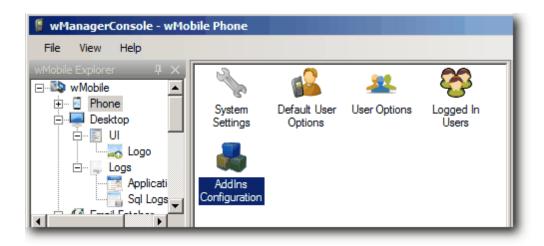
See Also:

- [Customizing Quick Search Fields](#)

- [Customizing Lookup Contact Fields](#)

4.17.5 wMobile Phone AddIn Configuration

 To make adjustments to AddIns for wMobile Phone, open the [wMobile Manager Console](#).
In the **wMobile Explorer** window, select the **Phone** node and then double-click the **AddIns
Configuration** icon in the center window.
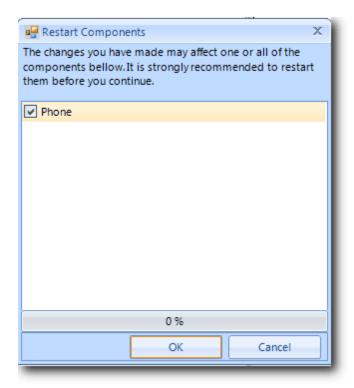
There are only two built-in AddIns for the wMobile Phone edition: **Cases** and **Reporting**.
(NOTE: If you have a custom AddIn provided by W-Systems, you will see it in this list as
well.)

Following is an example of disabling the **Cases** Addin. If you don't use GoldMine's **Service
Center** for cases, you might want to disable the **Cases** AddIn by unchecking it as shown
below in yellow. Click **Save** (shown highlighted in green) in the **Actions** window to preserve
this change.
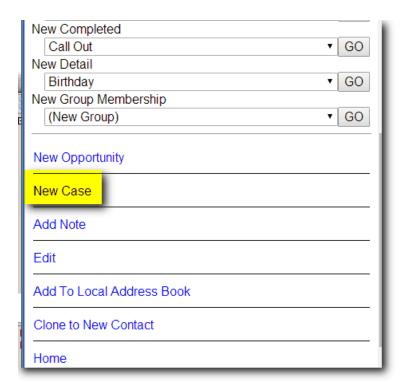
A prompt will appear requesting to restart the **Phone** component; click **OK** to proceed.

NOTE: Restarting the Phone application will cause users to be forced back to the wMobile login page.

When a user logs into wMobile after these steps are taken, the items related to **Cases** in the Phone Edition, such as the option to create a "New Case" will no longer be displayed.

4.18   Customizing wMobile Desktop Edition

📄 Managing Contact Tabs in wMobile Desktop

4.18.1   Managing Contact Tabs in wMobile Desktop

Following are examples and the steps to take in order to configure the contact tabs that will be displayed for users. The contact tabs configuration can be done for all users (globally) using the **Default User Options** or for specific users (individually) by using **User Options**. The process is similar for both but when setting the **Default User Options**, there is no availability to select a specific user.

Setting the Contact Tabs
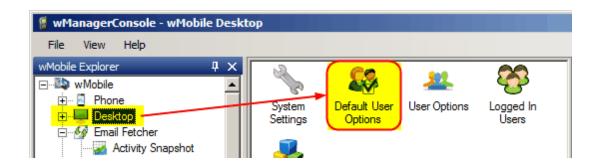
Typical for setting both types: "Default User Options" and "User Options"

Start by opening the wMobile Manager Console. Select **Start > All Programs > W-Systems > wMobile Manager Console > wMobile Manager Console**.
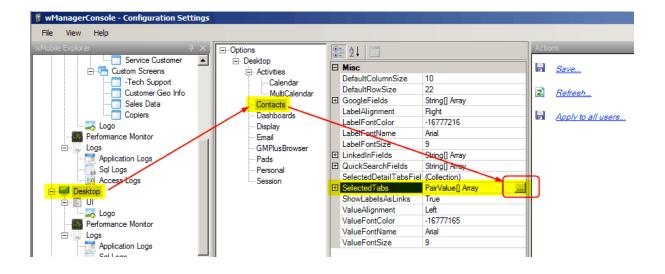
Select the **Desktop** node in the **wMobile Explorer** window.

To perform a global modification to the displayed tabs for "all" users:
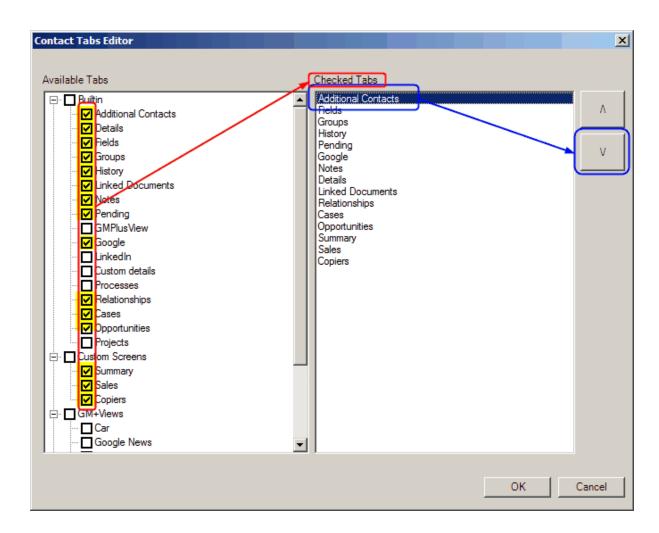
In the center window double-click on the **Default User Options** icon.

The center window will now display the options available. In the center window, navigate to **Options > Desktop > Contacts** and click on the **SelectedTabs** setting as shown and then click on the ellipses button.
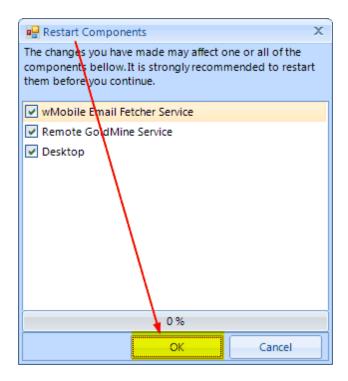
After clicking the ellipses button the **Contact Tabs Editor** dialog will appear. Tick the checkboxes for the tabs that need to be seen by the users. As a checkbox is ticked, its tab name will appear in the **Checked Tabs** window on the right (see below in red). Sorting the order of the tabs is done by selecting a tab name by clicking on it, and then using the up/down arrows to position the tab in the order preferred (see below in blue). The top-most tab in this list will display on the left and the bottom-most on the right in wMobile Desktop. After completing these steps, click **OK**.

Next, click the **Save** command in the **Actions** window at the right side of wMobile Manager Console.
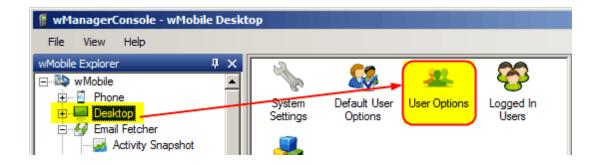
When performing this global change to all users, some wMobile components will need to be restarted. The following dialog will appear and clicking **OK** will start the processing. *NOTE*: Users that are logged into wMobile at this time will be dropped and will need to log back in after the processing completes so it may be best to warn users ahead of time.
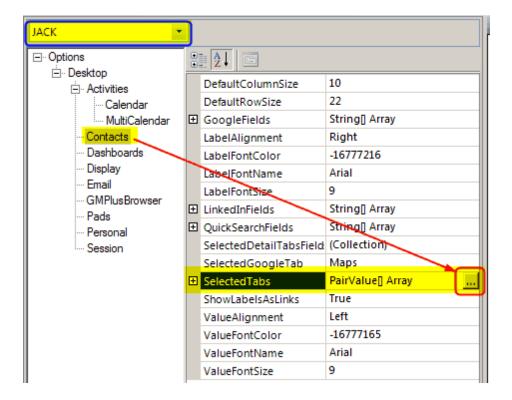
Now the tabs should be set the same for all users.

To perform a modification to the displayed tabs for a "specific" user:

In the center window double-click on the **User Options** icon.

The center window will now display the options available. In the center window, use the drop-down list to select the user you are configuring the tabs for (see below in blue). After picking the user, navigate to **Options > Desktop > Contacts** and click on the **SelectedTabs** setting as shown and then click on the ellipses button.

The remaining steps are the same as above for configuring the **Default User Options** with these exceptions:

- After clicking the **Save** command in the **Actions** window, you will not need to restart any components; that is only required when a global change is made to all users.
- The user will need to manually log out of wMobile and log back in to see the changes made if they were logged into wMobile during the configuration changes.
- User specific settings override those set using the **Default User Options**.

4.19 Password Complexity Requirements in GoldMine 2018.2

Starting with GoldMine 2018.2, GoldMine will now be storing passwords in proper case. Previously these were stored in all upper case, so as to be case-insensitive. After the GoldMine upgrade, all users will need to log into GoldMine using their existing passwords ALL IN CAPS, and then change their passwords. Password complexity settings can be configured, but going forward will likely include 1 upper case letter, 1 lower case letter, 1 digit/number, one special character, and a length requirement.

wMobile has adopted the password complexity requirements. Once wMobile detects GoldMine 2018.2 version, it will verify the user's password complexity at login. If it doesn't respect the password complexity requirements, the user will be prompted to update their password.
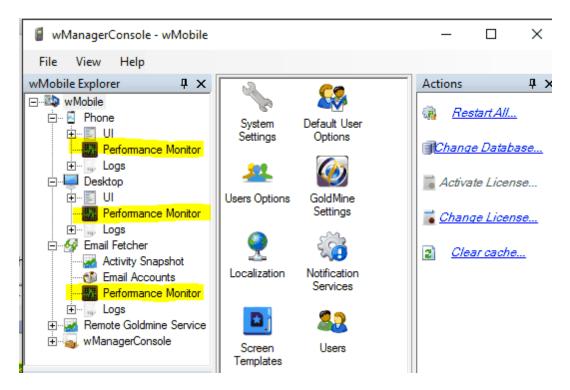
wMobile will no longer allow blank passwords, regardless of GoldMine version, beginning with wMobile 4.0.0.732.

Note that any One Click Logins that users had prior to the GoldMine 2018.2 update will no longer work. The One Click Logins contain the username and password in an encrypted form. If a user's GoldMine password changes, the One Click Login will need to be recreated.

Please see related topics on creating One Click Logins in wMobile Phone and wMobile Desktop.
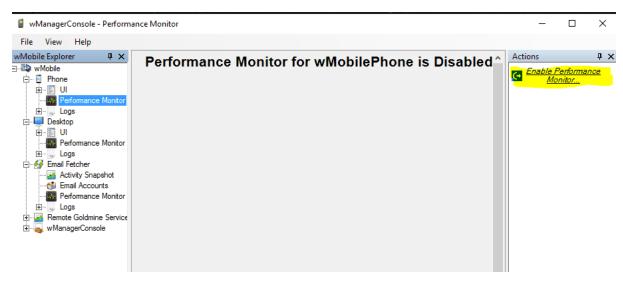
4.20   Performance Monitors

From the Manager Console you can see some performance indicators for three wMobile components (wMobile Desktop, wMobile Phone and Email Fetcher). You can access Performance Monitors from the wMobile Explorer pane on the left. There's a Performance Monitor for each of these component as shown below.
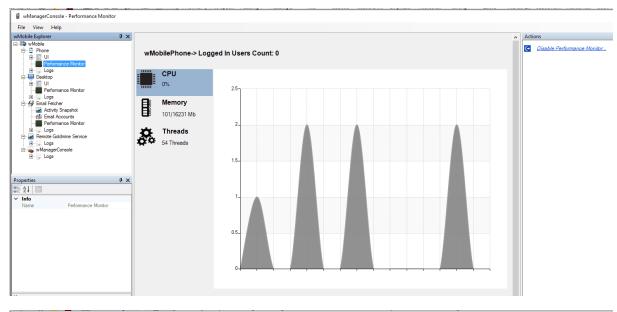
For the Performance Monitor to work, application pools (wMobileDesktop, wMobilePhone) and the

Email Fetcher Service need to be started.
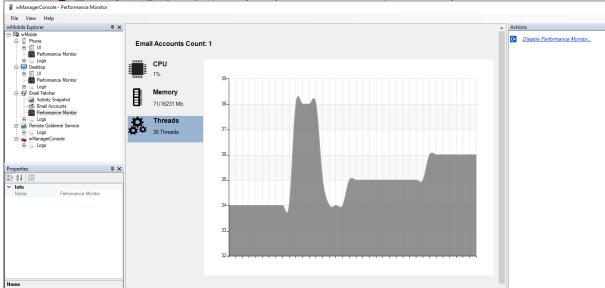
After clicking on Performance Monitor, you need to enable performance monitoring.

After you click on 'Enable Performance Monitor' you will be asked to restart the component for which

you want to see performance indicators. Click **OK** to restart the component.

Once enabled, the Performance Monitor registers information about **CPU** usage, **Memory** used, and the number of active **Threads** for that wMobile component. You will see a chart with all data collected.
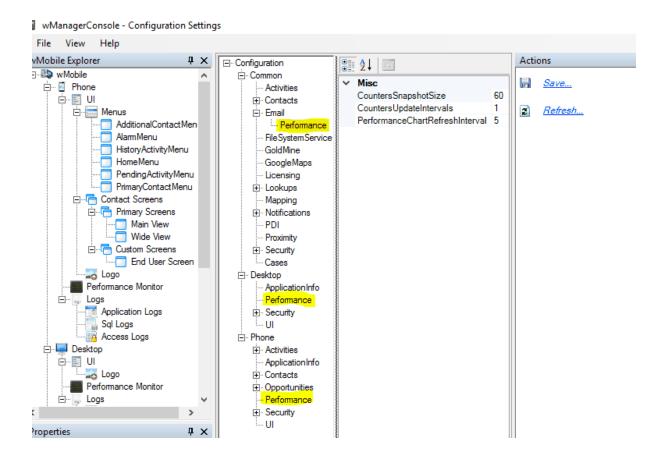
After you end with checking performance counters you can disable Performance Monitor from the Actions pane on the right. The monitoring does take up some resources, so you might not want to leave it running indefinitely.

You will be prompted to restart the component again for the change to take effect.

You can adjust Performance Monitor settings for every component from System Settings:

- **CountersSnapshotSize** : This setting represents the number of values stored for every

    performance counter. After this number is reached the oldest value is removed and the new

    value collected is inserted.

- **CountersUpdateIntervals**: This setting represents the interval in seconds used to update the performance counters collected data.

- **PerformanceChartRefreshInterval**: This setting represents the interval in seconds used to refresh the performance chart view.

Example:

So, with the above settings, the Performance Monitor will keep the last 60 values(*CountersSnapshotSize*) for every performance indicator (CPU, Memory, Threads) collected every one second (*CountersUpdateIntervals*). In other words, the Performance Monitor keeps data from the last minute.

You will see data collected in a chart with a refresh rate of 5 seconds (*PerformanceChartRefreshInterval*).
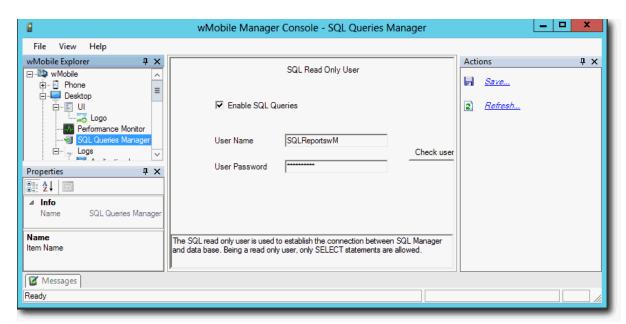
4.21   SQL Read-Only User for GoldMine 2018.2 Compatibility

In GoldMine 2018.2, administrators will need to configure a new SQL user with read-only permission for use with SQL queries, including filters creating using SQL syntax.

wMobile's SQL Desktop Manager has always only allowed SQL SELECT statements. However, for consistency we have added the same requirement of a read-only SQL user (regardless of GoldMine version).

The SQL User will be configured in the wMobile Manager Console.
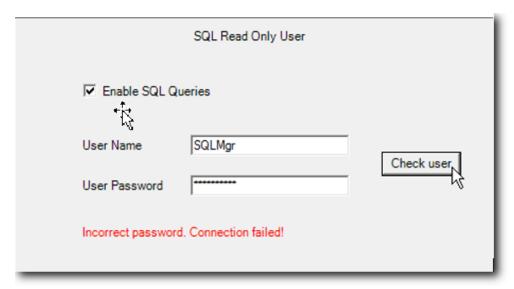
Navigate to **Desktop > SQL Queries Manager** in the **wMobile Explorer** pane on the left.
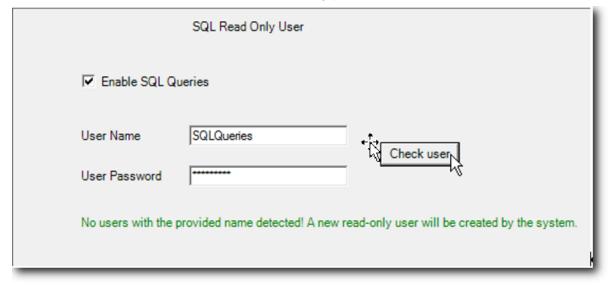
If you choose to use an existing SQL user (configured in SQL Server or GoldMine prior to use in wManager Console), the application will detect its existence and will test the connection. Click **Check user** to test the credentials. The screenshot below shows the confirmation when the password and connection are correct.

If any information is incorrect, an error will indicate the issue:
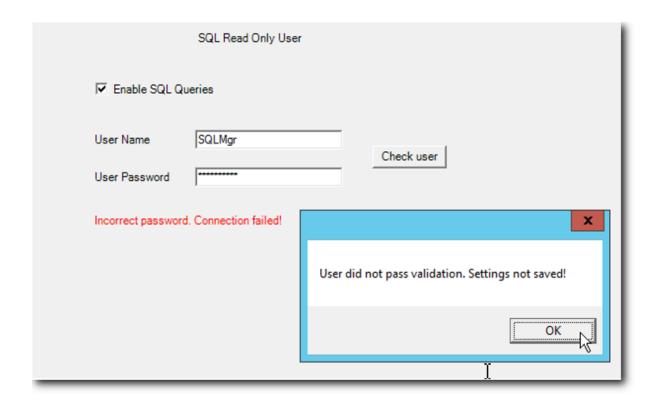
If a SQL Read-Only user does not exist, the application will detect when querying the database and will create the user with read-Only permission.

In the case of a failed check, the administrator will not be able to save the settings.

A failed check can occurs in one of the following cases:

- Using an existing user and an incorrect password
- Using a reserved SQL keyword as user name
- Using a blank user name or password

Note: wManager Console will reject any user name which is a reserved SQL keyword. The full list of SQL reserved keywords can be found at:
https://docs.microsoft.com/en-us/sql/t-sql/language-elements/reserved-keywords-transact-sql?view=sql-server-2017
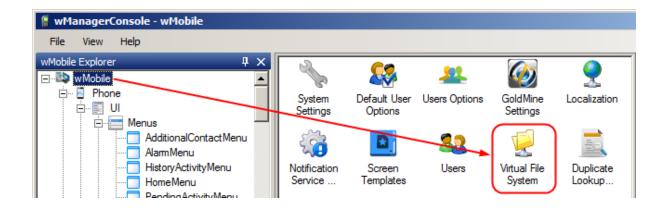
4.22 Virtual File System Settings

wMobile Manager Console has the option of creating a Virtual File System to manage paths used to access network resources. The network paths specified using UNC (Uniform Naming Convention) describe the location of a network resource, such as a shared file or folder.
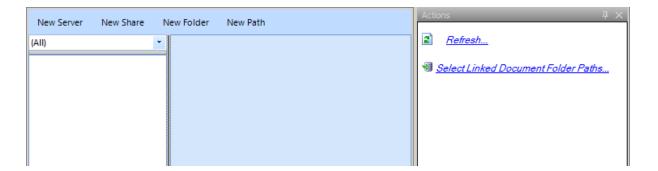
The UNC syntax used by Microsoft Windows has this generic form:
\\ComputerName\SharedFolder\Resource

The **Virtual File System** settings are accessed by selecting the **wMobile** node in the **wMobile Explorer** window and then double-clicking the **Virtual File System** icon.

At the top of the center window, the menu bar offers options for adding a New Server, a New Share, New Folder, or a New Path to the Virtual File System. Below the menu bar you will find a drop-down containing a list of all the users for which you can add network paths for in the Virtual File System.

The **Actions** window on the right contains commands for working with the virtual file system configuration. Because there are no network paths present in the file system view, the only available actions are **Refresh** and **Select Linked Document Folder Paths**. For detail on all available actions, please see: Virtual File System Actions.
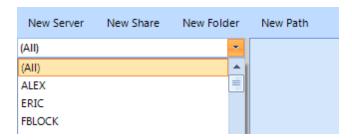
See Also:
📄 Virtual File System Commands
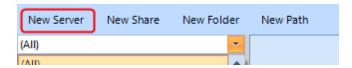
4.22.1 Configure Server

Steps to add a new server in the file system view.

Select the user for which the server will be added (or use **(All)** to make it available to all users).
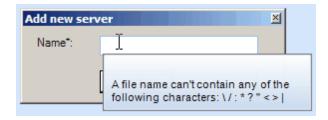
Click on the New Server command from the menu bar.
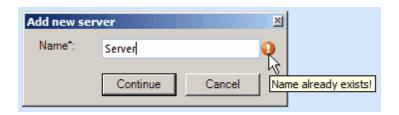
A window will appear prompting for the server name. Please note that some characters are not allowed in the **Name** field. When you hover the mouse over the **Name** field, a message will appear warning you about the characters that are not permitted in the server name.

Type the name of the server in the **Name** field and then click **Continue**.
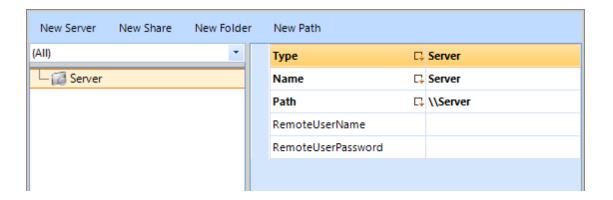
If you type a name that does not conform to the specified rules or a name that already exists in the file system, an error icon will be displayed and you cannot continue with this action. Hover your mouse over the error icon to view the error message.

The server is added to the file system view. When you click on the server node, its properties will be loaded in the property grid (located in center window). The fields that can be edited are **Name**, **RemoteUserName**, and **RemoteUserPassword**.

🐤 **CONFIGURATION NOTE**: The **RemoteUserName** and **RemoteUserPassword** credentials are only required when the documents are not on the same server as:
- the Remote GoldMine Service
- the path that is being shared (UNC or local path)
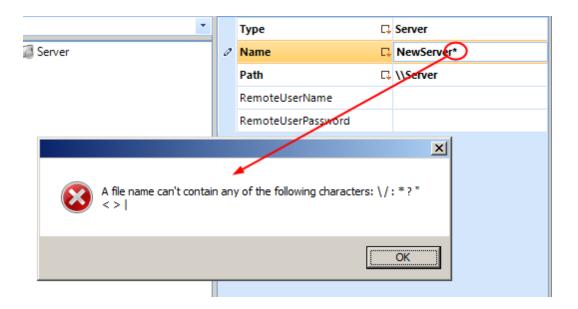
To change the name of a server already existing in the file system view, click on the server's **Name** row in the file system property grid to enable editing.
Type a new name for the server and click on any other row to save the change.

The same server naming rules mentioned earlier apply here. If you type a wrong character and try to save your change, an error message will display and the action is canceled. The previous name will remain as the server name.

When the server name is edited successfully, the path is automatically updated with the new **Name** entered for server.

> 🐦 **CONFIGURATION NOTE**: When updating a server, the changes will be saved automatically.

> ⚠ **IMPORTANT**:
>
> 1. The Path field is not editable. The **Path** field is automatically created when you insert a server name.
> 2. The server does not have a mapped drive designation available.
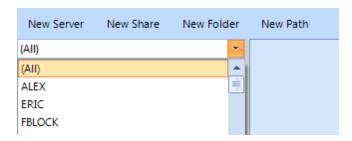
4.22.2 Configure Share

Adding a new share is available through the menu bar by clicking the **New Share** command.
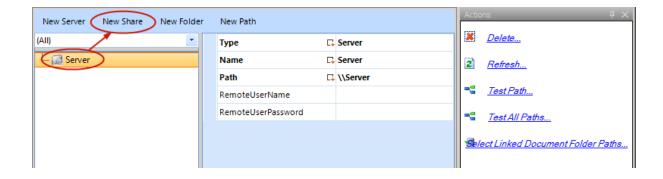
Steps to add a new share in the file system view.

Select a user from the drop-down. The paths previously created for selected user will be
loaded into the file system view.

When adding a **Share**, you must first select the server node to which you want to add the
Share, and then click the **New Share** button on the menu bar.

A window will appear prompting for the share **Name**. Type the share **Name**. Please see:
naming rules for details.
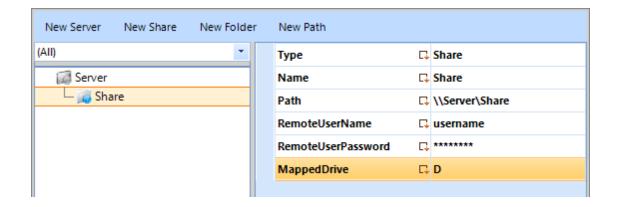
Click on the newly created share node in the file system view to load its properties in the
property grid (located in center window). You can configure a share Folder through the
editable fields: **Name, RemoteUserName, RemoteUserPassword**, and **MappedDrive**.

Multiple MappedDrive Letters
Multiple drive letters can be assigned to the same path if needed by separating the drive
letters with semi-colon (;) characters.
Example: **D;G;H**

> 🐤 **NOTE**: The **RemoteUserName** and **RemoteUserPassword** credentials are only required when the documents are not on the same server as:
> - the Remote GoldMine Service
> - the path that is being shared (UNC or local path)
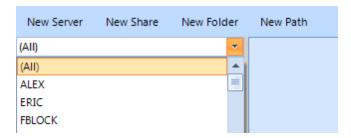
To change the name of the **Share** you can follow the steps used for [Configure Server](#).

4.22.3 Configure Folders

Adding a new **Folder** is available through the menu bar by clicking the **New Folder** button. A folder can be added to a share or another folder.
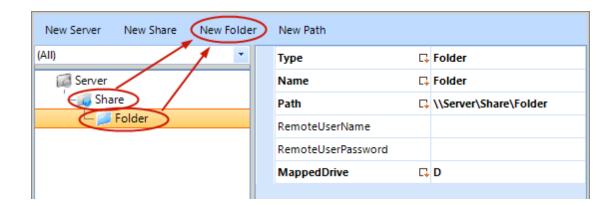
Steps to add a new **Folder** in the file system view.

Select a user from the drop-down. The paths previously created for the selected user will be loaded in the file system view.
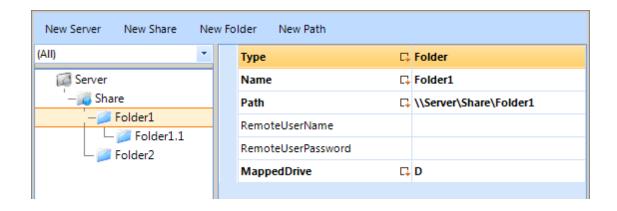
From the file system view, select a share node or a folder node for which you would like to add a new folder and then click the **New Folder** button.

A window will appear prompting for the folder **Name**. Type the folder **Name**. Please see: naming rules for details.

The newly added **Folder** is visible in the file system view.

See Also:

📄 The steps performed to edit a folder name are the same steps used to change the name of a share or server. For mode details please view the steps described in Configure Server.

4.22.4 Virtual File System Commands
Configuring Virtual File System

wMobile Manager Console allows an administrator to add, import, remove, and test paths in the Virtual File System.

The **Actions** window will contain these tools:

Delete: Deletes the selected node and all its children from the Virtual File System view.
Refresh: Refreshes the Virtual File System view.
Test Path: Tests the path of a selected node in the Virtual File System view.
Test All Paths: Tests all of the paths within the Virtual File System view.
Select Linked Document Folder Paths: Import the UNC paths, server, and share, needed to open a linked document.

Delete
1. Select a node you want to delete from the Virtual File System view.
2. In the Actions window, click Delete.
3. The node is deleted. If the node has children, they will be deleted as well.
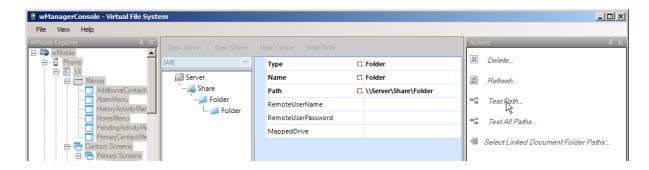
Refresh
1. Refresh the Virtual File System view.
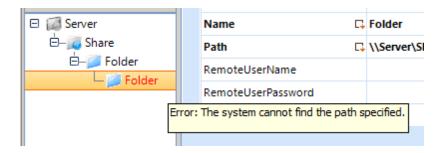
Test path
1. Select a node from the Virtual File System view to be tested.
2. In the **Actions** window, click **Test Path**. This action will cause the interface to be disabled temporarily during the test:

A path may have explicit credentials. However, if the current path does not have explicit credentials and does not inherit credentials from its parent folders or share, we will assume the path does not have credentials and it will be tested as such.

If the path that does not have explicit credentials and its parent folders or share has credentials, those credentials will be inherited.

3. When the testing action is complete, the interface will be enabled so you can edit the properties of a file system node.

4. If the test does not "pass", the node tested will be displayed in red.

5. Hover over the "red marked" node and a tool-tip with the error message will appear:

Test All Paths

1. In the **Actions** window, click **Test All Paths**. All the nodes present in the file system view will be tested.

2. The interface will be disabled temporarily during the path tests.

3. When the testing action is done, the nodes that did not pass the test will be displayed in red.

4. Hover your pointing device over a "red marked" node to view the error message.

Select Linked Document Folder Paths

1. In the **Actions** window, click **Select Linked Document Folder Paths**. This will open a window with the UNC network paths used to open linked documents.
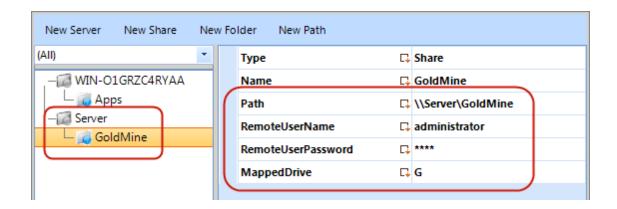
2. Chose the paths you would like to import into Virtual File System by clicking the checkbox in front of the UNC paths and then clicking the **Import** button. To cancel the operation click the **Cancel** button.

See Also:
📄 <u>Virtual File System Settings</u>
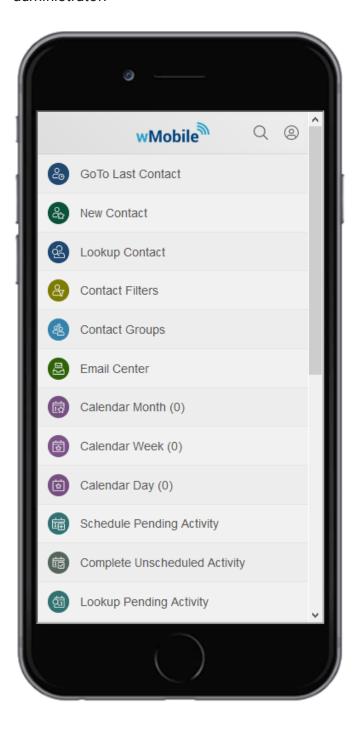
4.22.5   VFS Sample

This is a sample of a **Virtual File System** drive mapping configuration. In this example we set the server and path as: **\\Server\GoldMine** using the drive letter: **G**, and the credentials RemoteuserName: **administrator** and RemoteUserPassword: **test** (NOTE: **test** appears as ******** in the field).

5   Phone Edition

wMobile Phone Edition allows you to access your GoldMine information on mobile devices such as iPhone, Android, Blackberry, etc. All you need is an Internet connection and the web address which should be provided by your GoldMine or wMobile administrator.

5.1   General Editing

This topic covers general editing features that are important to know as they're used throughout wMobile Phone's user-interface.

When editing certain field values like "**Reference**" or "**Code**" when scheduling an activity or when adding or editing new or existing contacts, wMobile will allow you to either choose a pre-defined selection entry from a drop-down list or type your own entry into a textbox. The pre-defined selections that are available in the drop-down lists are typically maintained within GoldMine by an administrator (i.e., GoldMine's F2 Lookups).

Switch Between a Drop-down List and a Text Box
Using the button to the right of the field will change the entry method between a drop-down list and a text box.

This is a drop-down list:
Please take note of the arrow button designating this as a drop-down list. Tap the arrow button to change from using a drop-down list to use a textbox.
This is an example of a typical drop-down list. Based on the mobile device you are using, select the appropriate method to open the list of choices to select from. As an example, for the iPhone devices, tap the drop-down to display list of choices.

Reference:
Conference Call   ▷
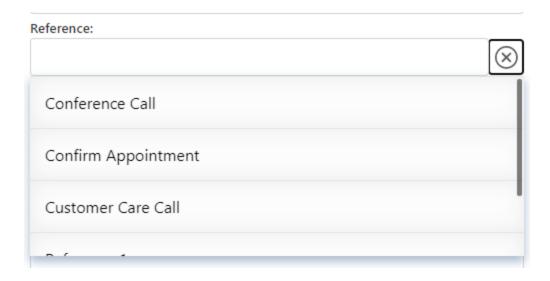
Drop-down list contents:

Tapping the black arrow ▷ will open the list to allow a selection to be made.

This is an example of a list that will be displayed when using a drop-down for entering data into a field.
NOTE: The data in your drop-down lists will vary based on your specific business model.

This is a textbox:

To place data into a textbox, simply type in your data entry.

Tap the [>] arrow button to change from using a textbox to use a drop-down list.

Entering Data into a Drop-down List or a Text Box

Whether you decide to use the drop-down list or the textbox for data entry will depend on if wish to pick your selection from a list of choices (use drop-down) or type an entry manually (use the textbox).

Editing Notes (Pending and History Records)

Pending activity notes and history record notes play a key role in keeping solid relationships with your contacts. Within the notes field for these record types, you can add, edit or simply review notes for the current activity.

Notes textbox:

The notes field is a multi-line free-form text box. Enter helpful information here to aid in upcoming activities (Pending) or meaningful information describing what occurred for an activity (History). Text is edited in the same way for both pending and history notes.

Notes:

Prepare for a training session: documentation, database updates on server.

5.2   Connecting to wMobile

Getting started requires connecting to wMobile using your specific mobile device. Your devices Internet browser is used to access wMobile. These sections cover these topics to get your device configured.

📄 Open Your Internet Browser
📄 Adding a Browser Shortcut to wMobile
📄 Logging into wMobile
📄 Special Browser Configuration
📄 Setup One Click Login

💡 **TIP**: Since there are so many devices capable of being used to access wMobile, we cannot list them all in great detail within this User's Guide. Please use the instructions found here as a starting point for performing certain device specific functions and refer to your device's documentation for full details if further help is needed.

5.2.1   Open Your Device's Internet Browser
Each device being used to connect to wMobile has its own method for accessing the web browser. Below are examples of methods from popular devices/operating systems.

*** Please note that your specific device might not be mentioned here. ***
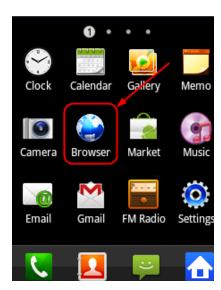
Using an iPhone or iPad

- On the Home Screen, tap on the **Safari** icon (Safari is the default browser in the Apple iOS).

Using an Android Phone or and Tablet

- On the Home Screen, tap on the **Browser** icon (some Android devices might be using **Chrome** as the default browser).

Using a Windows Phone

- On the Home Screen, tap on the **Internet Explorer** icon.

5.2.2   Adding a Browser Shortcut to wMobile

To avoid having to type the web address into your browser for each wMobile session, save the web address to your browser's favorites.

For each of the instruction examples below, start by opening your browser and then navigating to the wMobile login page using the web address (i.e., URL) of your wMobile sever provided by your wMobile administrator.

Once you have the wMobile login screen displayed in your browser, continue to add a shortcut/bookmark.

*** Please note that your specific device might not be mentioned here. ***

Using an iPhone or iPad

With the wMobile login page in the browser, tap on **Share** ( ) icon:

- Tap "**Add Bookmark**" from the selections provided.
- Add the bookmark details (name and location) and tap **Done**.

Using an Android Device

Using Default Browser:
- Tap the **Menu** icon.
- Tap **Add Bookmark**.
- Tap and hold bookmark in **My Device** - then tap **Add shortcut**.

Using Chrome:
- Tap **Menu**.
- Tap **Add to Homescreen**.
- Change the title and tap **Add**.

Using a Windows Phone

- On Start, tap **Internet Explorer** and open the [wMobile login](#) page.
- Tap **More ... > Add to favorites**
- Internet Explorer automatically fills in the name and web address (URL) of the site. If you don't need to make any changes, tap **Done**.
  - o Otherwise, tap inside a text box to edit an entry. When you've finished, tap **Done**.

See further information in Preferences on creating a [One-Click Login](#) that will store the user name and password along with the web address.

5.2.3 Logging into wMobile

Your wMobile administrator will provide the web address (i.e., URL) needed for accessing wMobile using your [device's Internet browser](#). In the following URL examples, you will need to replace "*External_IP_Address*" and "*Internal_IP_Address*" with your specific IP addresses as required:

http://***External_IP_Address***/wMobilePhone
http://***External_IP_Address***/wMobileDesktop
or
http://***Internal_IP_Address***/wMobilePhone
http://***Internal_IP_Address***/wMobileDesktop

If you are using DNS (Domain Name System), a domain name can be used instead of the external (or internal) IP address if you have the required DNS entries. Here are examples for URLs using DNS:

http://*yourdomain*.com/wMobilePhone
http://*yourdomain*.com/wMobileDesktop
or
http://wmobile.*yourdomain*.com
http://wmobiledesktop.*yourdomain*.com

📃 **NOTE**: The HTTPS protocol is supported.
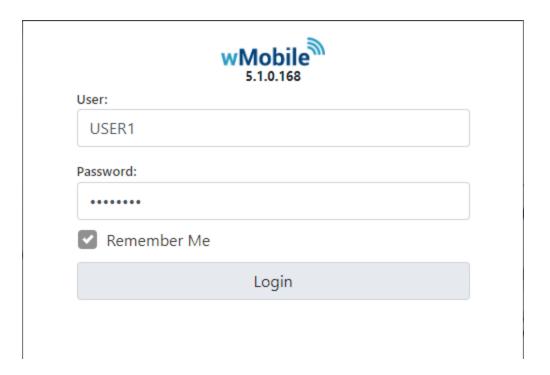
Hyper Text Transfer Protocol Secure (HTTPS) is HTTP through a secured connection. Communications through an HTTPS server are encrypted by a secure certificate known as an SSL. The encryption prevents third-parties from eavesdropping on communications to and from the server.

The HTTPS protocol can be configured using the wMobile Phone Advanced Installation and the wMobile Desktop Advanced Installation types. If wMobile was initially configured to use the HTTP protocol, it can later be changed to use HTTPS.

💡 **TIP**: If you are having trouble with a wMobile URL, please try this troubleshooting topic: Internet Service Provider (ISP) Has Changed

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Once your browser connects to your wMobile Internet site, you will be presented with a wMobile login page.

- Use your GoldMine username and password credentials for logging into wMobile (users must have already been granted access to login).
- Tap **Login**.

Login Notes

- wMobile will only accept one login per user name at any time. If you login a second time your initial session will be automatically logged out.
- When logged into wMobile and you have been inactive for a predetermined number of minutes (as defined by your wMobile administrator), your session will time out and you will be logged out of wMobile automatically. At that point, you will need to log back in using your username and password again.
- If you need to change your login password, this must be done in GoldMine.

Login Failure Codes

Wrong username or password

There is a mismatch between your GoldMine username and password. You may have mistyped one of these credentials.

Not a wMobile User

The username has not been registered on the wMobile server. Check with your administrator to ensure you are using your correct GoldMine user name.

Access denied

You have entered a valid username and password combination but your wMobile administrator has disabled your use of wMobile.

Access is locked

The wMobile user account has been locked after too many failed login attempts. Contact your GoldMine/wMobile administrator to <u>unlock the user account</u>.

💡 **TIP**: If you are having trouble logging into wMobile, please try this troubleshooting topic: <u>User Cannot Log into wMobile</u>

5.2.4 Special Browser Configuration

Some browsers need to be configured to support advanced web applications such as wMobile.

*** Please note that your specific <u>device</u> might not be mentioned here. ***
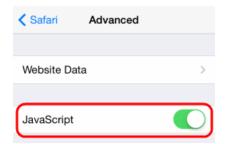
iPhone and iPad Configuration

In Apple's iOS, JavaScript needs to be enabled. This is done within the **Safari** browser settings.

- Select the **Settings** application/icon on the **iPhone/iPad** Home Screen.
- Select **Safari** on the following screen.
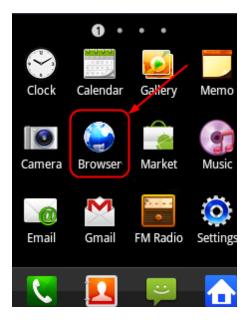
- Select **Advanced**, located near the bottom of the following screen.
- Move the **JavaScript** toggle to the right so that it highlights green.

Android Configuration

Follow these instructions to activate and enable JavaScript on your Android.

- Select **Browser** or **Internet** to open the web browser.

- Select **Menu**.
- Select **More** then **Settings**.

- Finally select **Turn on JavaScript**.

BlackBerry Configuration

We have found that some BlackBerry browsers need to be configured to turn on support for HTML tables, Java scripts and CSS style sheets. Here is how to perform these configurations on a BlackBerry:

The BlackBerry browser application starts you in a bookmarks page. To add a bookmark:
- Click the scroll wheel
- Scroll down to and tap on **Add Bookmark**
- Type the name of the bookmark '`wMobile`'
- Type the web address given to you by your wMobile administrator
- Click **Add**

Scroll and tap on the selections for:
- Support HTML Tables
- Use Foreground and Background colors
- Support Java Script
- Support Style Sheets
- Emulation Mode

> 🐤 **CONFIGURATION NOTE**: BlackBerry users may need to change the **Emulation Mode** to **Microsoft IE** for the best display quality.
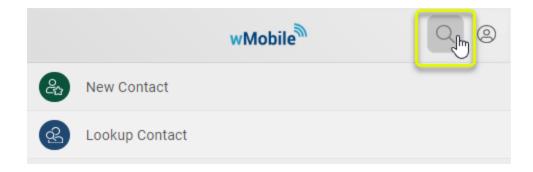
5.3   Navigation in wMobilePhone

A navigation bar appears at the top of each page, for use in navigating no matter what page of wMobile you're working on. It contains navigation links (back and home), the title of the current page, search contact button, and user profile menu button.

Quick Search

Click on the magnifying glass from the header menu.
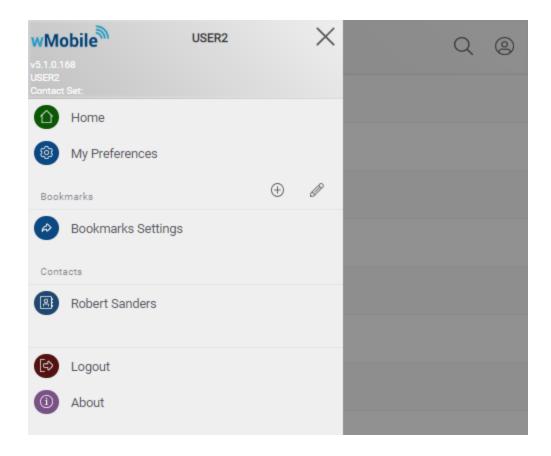
Click here for more info on Quick Search.

User Profile Menu

The user profile menu is accessed from the right most icon on the navigation bar.

The user profile menu button will open a new menu specific to each user.

At the top of this menu you will see information like: the logged in user name, the selected contact set, and the current application build number.

Then, you will see the following menu items:

- Home page link
- My preferences link. Click here for further information on configuring <u>user preferences</u>.
- <u>Bookmark Settings</u>
  - You can save your favorite pages and access them directly from this menu
- <u>Recent Contacts</u>
  -
- <u>Logout</u> option
- <u>About</u> page link - this link will display information on the current wMobile version and specific build.
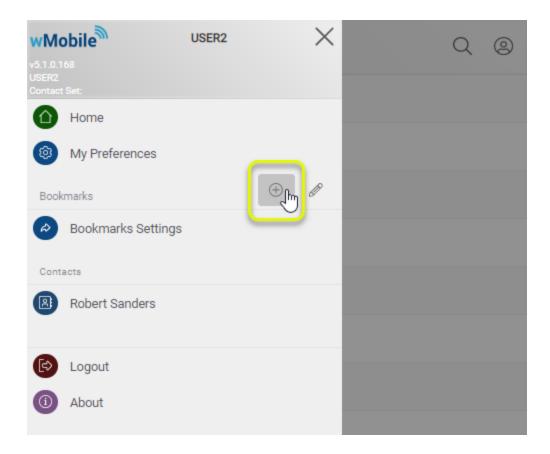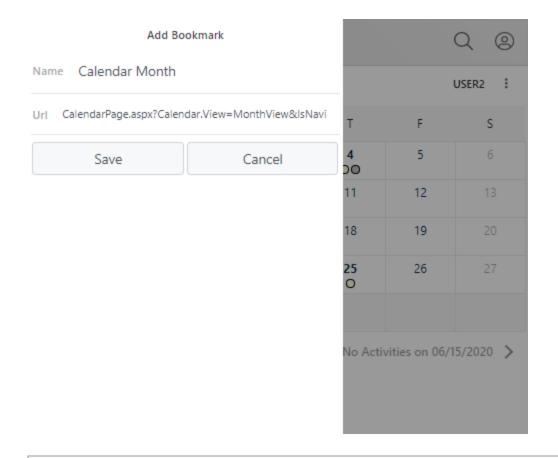
Admins can edit this menu in the Manager Console. They are able to add new items, hide items, or change the item order in the same way it can be done for the Home Menu .

5.3.1   Bookmarks

It's very easy to save a frequently used page. Just navigate to the desired page within wMobilePhone, open the side menu and use the 'New Bookmark' (+) button.
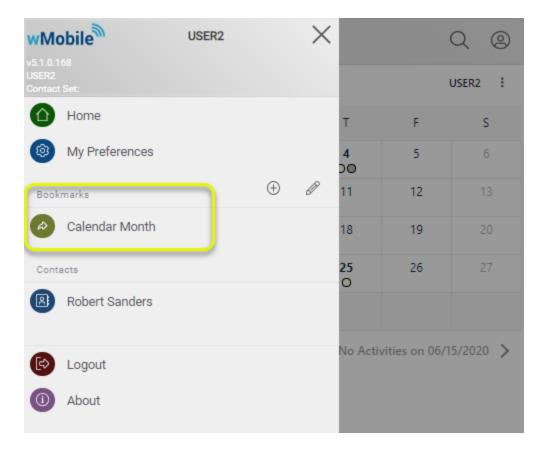
You will have the option to choose the name of your new bookmark.
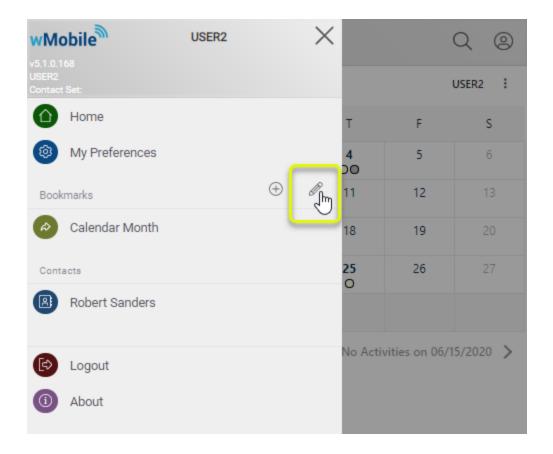
> 🗎 **NOTE**: You can change the URL with an external link if you want to access an external web page directly from wMobilePhone.
>
> After the link is saved, it will appear in the Bookmark list..
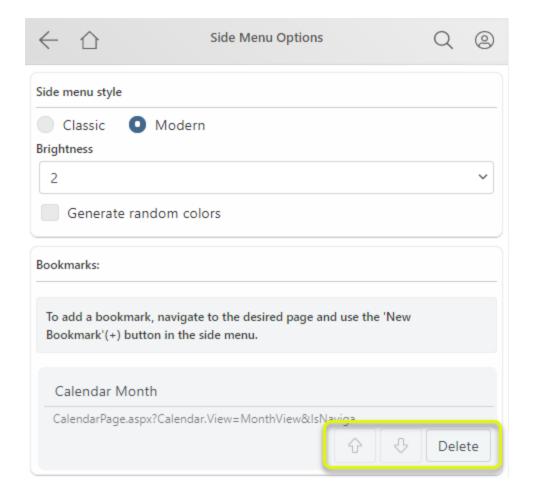
If you click the pencil icon (Edit) you will be redirected to the 'Side menu options', where you can edit your bookmarks.
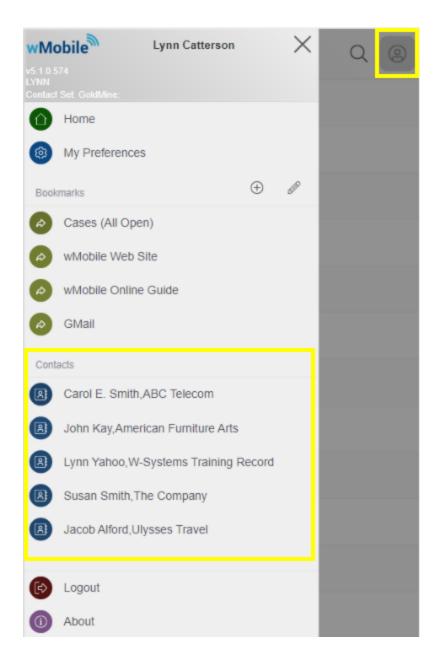
You have the option to edit the bookmark name, to delete bookmarks or to move up/down bookmarks.

5.3.2 Recent Contacts

wMobile offers the option to navigate back to recently viewed contacts from the User profile menu.

- You can personalize how many recent contacts to see (from 0 to 10) and in which format. This option is available in "Side menu options".
- Available formats:
  - Contact
  - Company
  - Contact, Company
  - Company, Contact

5.4   Home Menu

After a successful login to wMobile you will be presented with the **Home Menu** page. This page contains links to many of the features you will be using in one easily accessible location.

While logged into wMobile Phone, tapping the Home icon (⌂) at any time will bring you back to this **Home Menu**.

Directly below the wMobile logo is the Quick Contact Search feature followed by a list of links used for accessing different features available in wMobile.

Menu Link Details:
- Quick Search (contacts)
- Alarms
- Go To Last Contact
- New Contact
- Lookup Contact
- Contact Filters
- Contact Groups
- User Email Inbox
- GoldMine Inbox
- Email Center
- Calendar Month
- Calendar Week
- Calendar Day
- Schedule Pending Activity
- Lookup Pending Activity
- Lookup History Activity
- Today's Calls
- Today's Appointments
- Today's Other Actions
- This Week Other Actions
- Forecasted Sales
- Opportunities
- Cases
- Dashboard
- Reports

📄 [My Preferences](#)
📄 [Logout](#)
📄 [About](#)

💡 **CONFIGURATION NOTE**: Menus may vary from what you see in this document to what you see displayed when you log into wMobile. Your administrator might have customized this Home Menu to suit the needs of your business. Email account configurations will also affect what is displayed on this menu.

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wMobile

Alarms (1)

GoTo Last Contact

New Contact

Lookup Contact

Contact Filters

Contact Groups

Calendar Month (1)

Calendar Week (0)

Calendar Day (0)

Schedule Pending Activity

Complete Unscheduled Activity

Lookup Pending Activity

Lookup History Activity

Todays Activities (0)

This Week Activities (0)

Todays Calls (0)

Todays Appointments (0)

Todays Other Actions (0)

This Week Other Actions (0)

Forecasted Sales

Opportunities (0)

My Open Cases (0)

5.4.1   Quick Search (Contacts)

Quick Search Usage
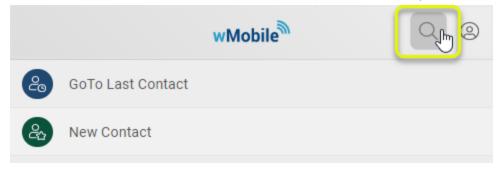
Under the wMobile application logo you will find the **Quick Search** feature. This allows you to type in any portion of a contact name, company name, or city value to quickly find a contact in your database. By default, wMobile is set to search for **Primary** contacts (see selected radio button in example image below). Alternately, you may choose to select the **Additional** radio button causing the scope of your search to be narrowed down to additional contacts only. When using the **Additional** radio button, you may still use text for all or part of the company name if known along with the contact name.

Example Search:

In this example, you need to search for a person named: "**Susan Smith**" and you also know that Susan works for a company named: "**ABC Company**". In wMobile, simply type "`susan abc`" (without quotes) into the **Quick Contact Search** box and tap the **Search** button.

wMobile will search for both contact names and company names for any combination of the words you have entered into the **Quick Contact Search** box.

To open the Quick Contact Search box first tap on the magnify glass from the header.
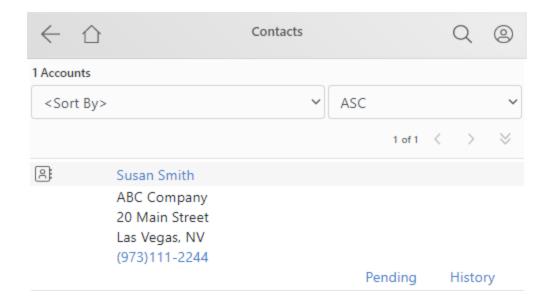
Type your search text in the field as shown here:

Example Results:

The **Quick Contact Search** results will display in a list similar to the one shown here.

In the results listing you will see a portion of the details available for each of the contacts that were found based on your search criteria. To see the details for one of these contacts, tap on the contact's name link (e.g., Susan Smith).

NOTE: When the contacts result list is displayed, for any contacts that do not have a "contact name", wMobile will display (No Contact Name). Tap on the (No Contact Name) link to see that contact's details.

For each contact listed there will be two links: Pending History. These links open the following:
The Pending link opens the **Contact Pending Activities** page (displays: all activity types)
The History link opens the **Contact History Activities** page (displays: all activity types)

Get information on the Contact Detail screen.

The **Quick Search Configuration** settings allows you to add or remove fields that are used by **Quick Contact Search**.

📑 **NOTES**:
1. In wMobile, email addresses and phone numbers are available as hyperlinks for quick access to your email client and to dial the viewed phone number.
2. In the contact results listing there may be shortcuts to common contact commands such as Pending and History that are displayed and are links that may be used to view the pending activities (those that are scheduled) or activity history (those that have been completed) for the listed contact.

5.4.1.1   Quick Search Configuration

Quick Search Configuration settings allow you to add or remove fields that are used by **Quick Contact Search**.

The default Primary Contact Search Fields are: Company, Contact, and City (Contact1.U_Company, Contact1.U_Contact, and Contact1.U_City).
Available fields for searching are from within the CONTACT1 and CONTACT2 (user-defined) GoldMine tables.

The default Additional Contact Search Fields are Company, Contact, and Ref (Contact1.U_Company, Contsupp.U_Contact, and Contsupp.U_Contsupref).
Available fields for searching are from within the CONTACT1 and CONTSUPP GoldMine tables.

See the following details for editing your configuration for the fields you use most.

Accessing QuickSearch Configuration:
From the [Home](#) page, tap [My Preferences](#) then [Contact Options](#).
On the **Contact Options** page, scroll down to **Quick Search Configuration**.
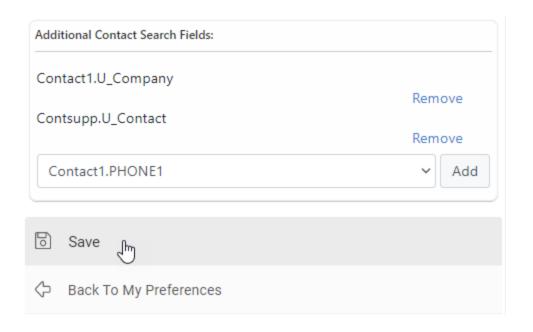
Example Configuration (adding contact1.PHONE1):
To add a field to a Quick Contact Search, select it from the drop-down. For this example of adding the PHONE1 field, you would select Contact1.PHONE1 in the drop-down, and then tap the Add button.

To remove a field that is already configured as a search field, simply tap the Remove link associated with the field.
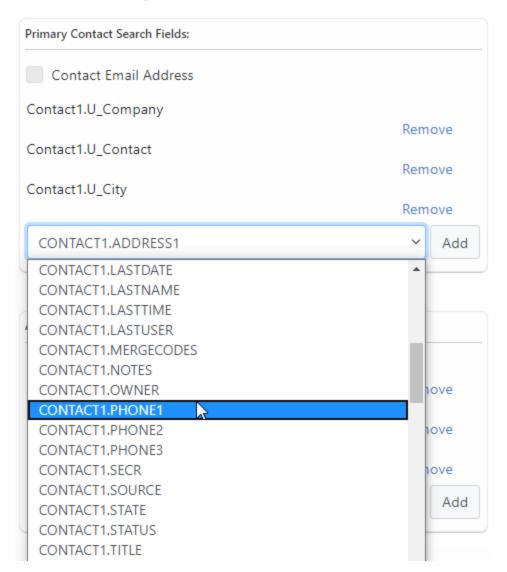
The **Additional Contact Search Fields** are configured in the same manner as the Primary fields.

To complete the configuration, tap **Save**:

Additional Contact Search Fields:

Contact1.U_Company

Remove

Contsupp.U_Contact

Remove

Contact1.PHONE1   ⌄   Add

💾 Save

⬅ Back To My Preferences
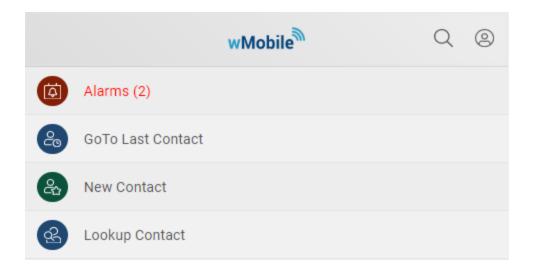
📄 **NOTE**: PHONE1, PHONE2, and PHONE3 are column names in GoldMine's CONTACT1 table. The "labels" associated with these phone fields may be different.

Quick Search Configuration

Primary Contact Search Fields:

☐ Contact Email Address

Contact1.U_Company

                                                        Remove

Contact1.U_Contact

                                                        Remove

Contact1.U_City

                                                        Remove

| CONTACT1.ADDRESS1 | ⌄ | Add |

CONTACT1.LASTDATE
CONTACT1.LASTNAME
CONTACT1.LASTTIME
CONTACT1.LASTUSER
CONTACT1.MERGECODES
CONTACT1.NOTES
CONTACT1.OWNER   nove
CONTACT1.PHONE1
CONTACT1.PHONE2   nove
CONTACT1.PHONE3
CONTACT1.SECR   nove
CONTACT1.SOURCE
CONTACT1.STATE   Add
CONTACT1.STATUS
CONTACT1.TITLE

5.4.2   Alarms

wMobile shows any Alarms for activities immediately after logging into wMobile. The
Alarms link is displayed in red at the top of the Home Menu and the number of alarms
appears in parentheses. The Alarms link will only display when there are current alarms for
the logged in user.
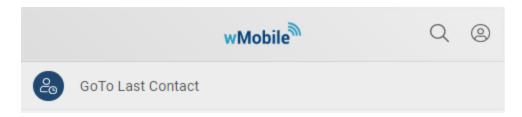
Tap on Alarms to see a list of alarmed activities. Only activities with alarms due today or past due will be displayed. From this list, a user can select to **Turn Off** the alarm or **Complete** the activity. Tapping on the reference line of an alarmed activity (highlighted blue line) will open the details of that activity in another page and allow the user to: turn off the alarm, complete, edit, or delete the activity, and go back to this list or the Home Menu.
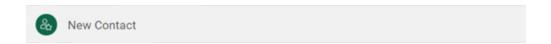
5.4.3   Go To Last Contact

Tap the **Go To Last Contact** link to view the contact detail page of the last contact you viewed in this or your last session in wMobile. The last contact you view before logging out of wMobile is saved from that session. When you log back into wMobile and tap the **Go To Last Contact** link, the last contact you viewed is displayed whether your prior session was ten (10) minutes ago or ten (10) weeks ago.

5.4.4   New Contact

To create a new contact, tap the **New Contact** link. This will open the **Add Contact** page in wMobile.

A contact entered into wMobile will be immediately available to all other wMobile users as well as all GoldMine users on the network. All field customizations and field values available in the drop-down lists in GoldMine will likewise be available in wMobile.
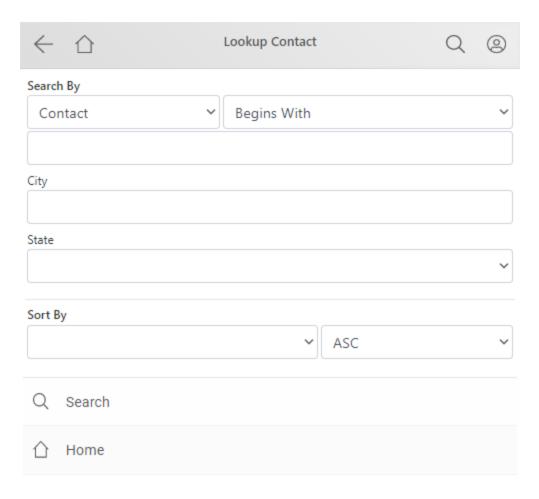
See Also:
📄 Add New Contact (Additional)
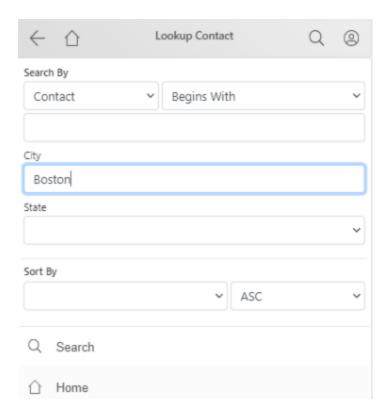
5.4.5   Lookup Contact

The **Lookup Contact** link on the Home Menu allows you to search for contacts or companies using more criteria than the Quick Contact Search feature that is at the top of the Home Menu page. You can search on one of several fields and also filter using city and state values.
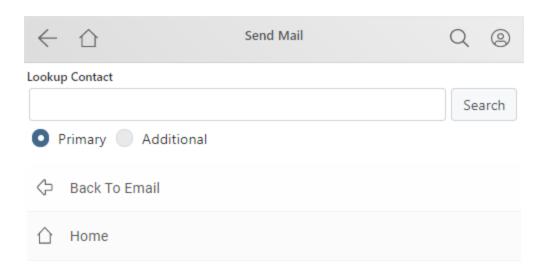
On the **Lookup Contact** page, the selectable search field has an associated drop-down to allow the selection of: **Begins With**, **Ends With**, **Contains**, **Equal To**, **Not Equal To**, **Greater than**, **Less than**, **Greater than or Equal to**, **Less than or Equal to**. Default Search fields include Contact, City, and State.

Any or all of these fields can be used for a search.

This type of **Lookup Contact** page appears when searching for email recipients when sending email.
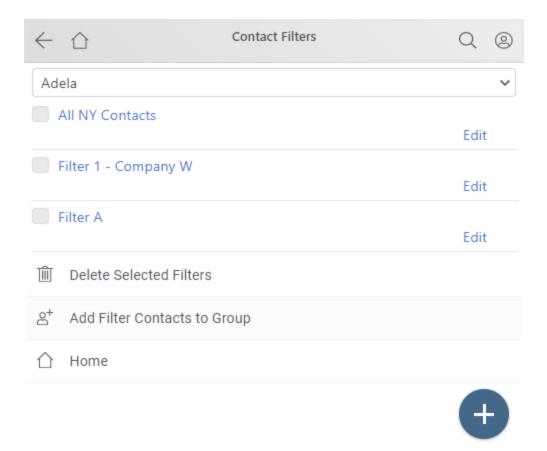
See Also:
📄 Customizing Lookup Options
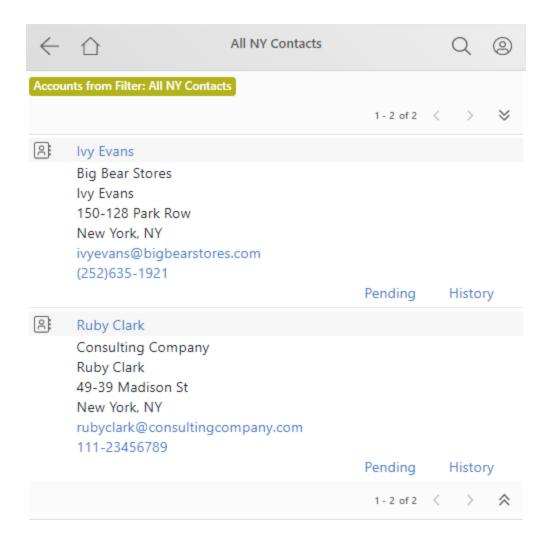
5.4.6   Contact Filters

If you have filters defined in GoldMine, they will be displayed on the **Contact Filters** page in wMobile. By default, the filters of the logged in user are displayed. However, using the drop-down to select another user will cause that user's filters to be displayed.
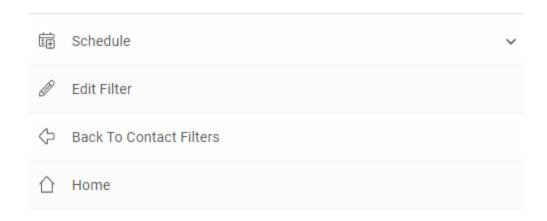
Tap on a filter to see only the accounts that meet the filter criteria.
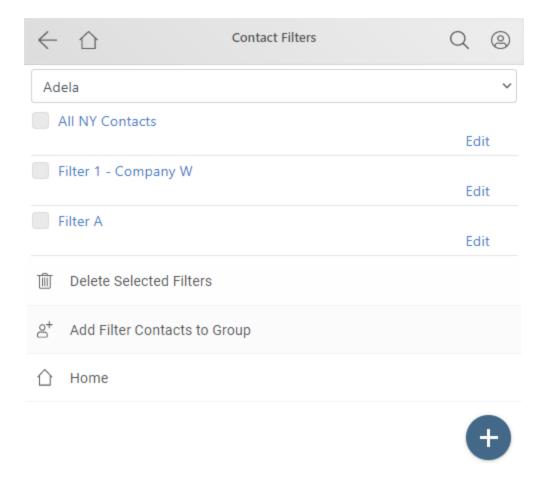
The filtered contacts will be listed in groups of ten (10) if there are more than ten that meet the criteria. A count will be displayed. Use the **<<** and **>>** symbols to scroll through the records. From this list, a user can tap on a contact to view more detail, tap on the email address if one is listed to draft an email message, tap on the phone number to make a call, or tap on **Pending** or **History** to view related activities.
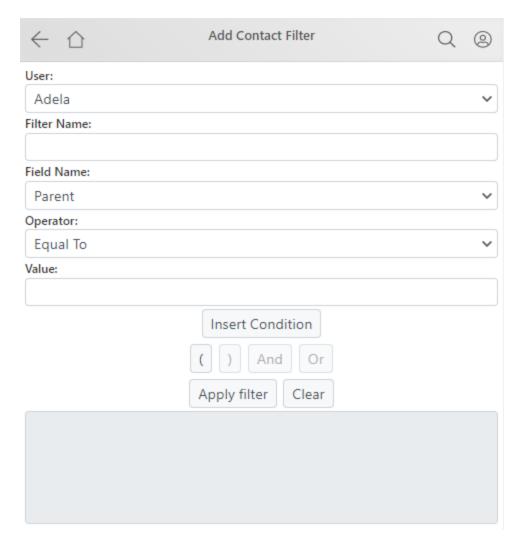
At the bottom of the list are options to **Schedule, Edit Filter**, go **Back to Contact Filters**, or return to the Home menu.

At the bottom of the list of filters, there is a button for creating a new Filter (+) and the other options for deleting, **Delete Selected Filters**, **Add Filter Contacts to Group**, and return to the [Home](#) menu.
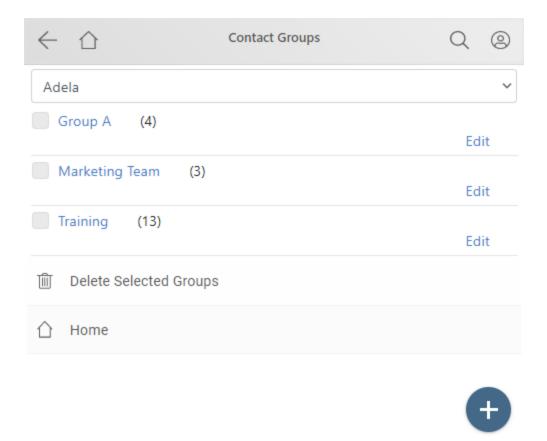
If **New Filter** is selected, the user will have the opportunity to name the filter and enter criteria in a manner very similar to GoldMine.

5.4.7   Contact Groups

If you maintain groups of contacts in GoldMine, these same groups will be available in wMobile. It is convenient to maintain these as they can provide quick lists of your top customers, groups created for marketing campaigns, etc.

The **Contact Groups** page lists the names of the contact groups and the number of members within each contact group.
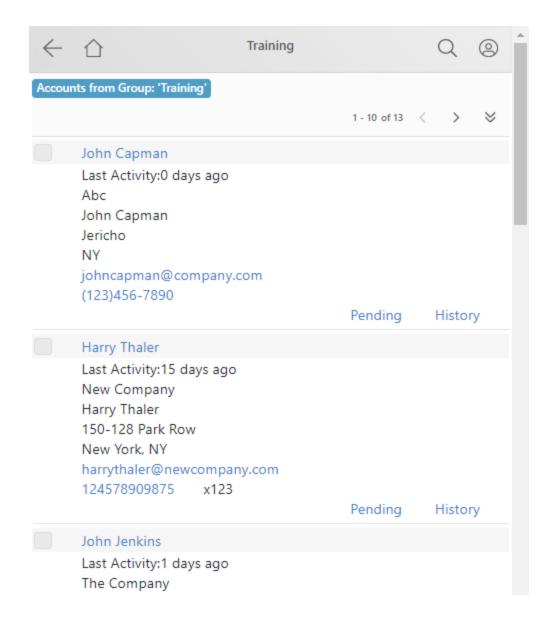
When a specific contact group's name is tapped, the contacts that are members of that selected group are displayed in a list. The name of the Group will be displayed at the top of the list.
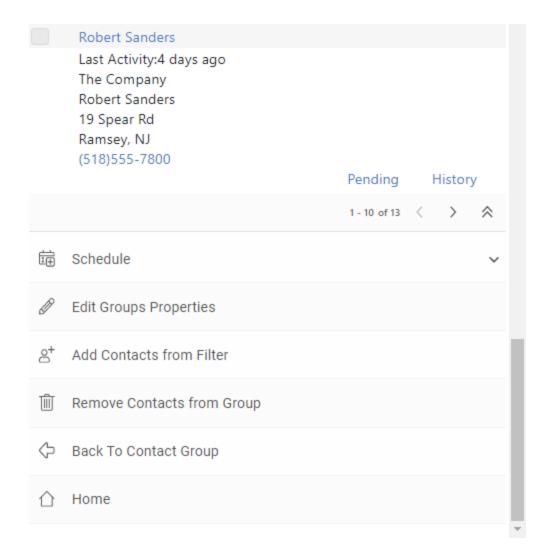
From the list of Contact Groups, the user may create a **New Group** (the " + " button), **Delete Selected Groups**, or return to the **Home** menu.

The contacts will be listed in sets of ten (10) if there are more than ten contacts in the group. A count will be displayed. Use the < and > symbols to scroll through the records.
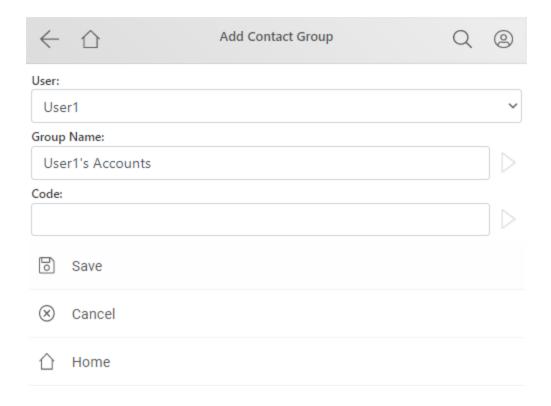
From this list, a user can tap on a contact to view more detail, tap on the email address if one is listed to draft an email message, tap on the phone number to make a call, or tap on **Pending** or **History** to view activities.
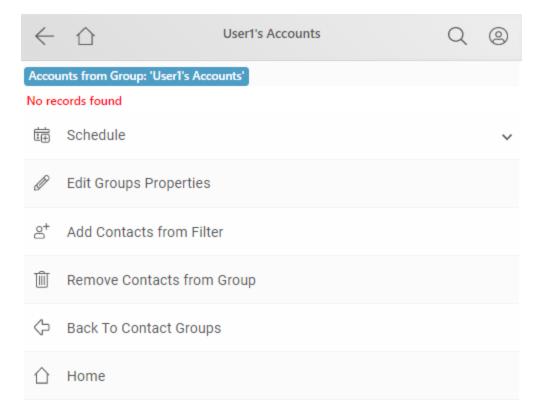
At the bottom of group list page, the user may choose to **Edit Group Properties, Add Contacts from Filter, Remove Contact(s) From Group**, go **Back to Contact Groups** or return to the **Home** menu.

Robert Sanders
Last Activity:4 days ago
The Company
Robert Sanders
19 Spear Rd
Ramsey, NJ
(518)555-7800

Pending   History

1 - 10 of 13   ‹   ›   ⌃

📅 Schedule   ⌄

✏️ Edit Groups Properties

👤⁺ Add Contacts from Filter

🗑️ Remove Contacts from Group

↩️ Back To Contact Group

⌂ Home

If a new contact group is created, the user may select the group name and a code. The user defaults to the logged in user, but a different user may be selected. Tap **Save** to save the new Contact Group and it will be added with zero (0) members.

After the new group is created, members can be added to it. Tap on the group's name link and then use **Add Contacts from Filter**.

5.4.8   User Email Inbox

This link will allow you to view new email messages in your email server mailbox or Internet service provider mailbox. If you use GoldMine for email, this is the equivalent of the "Online" mailbox in the GoldMine Email Center.
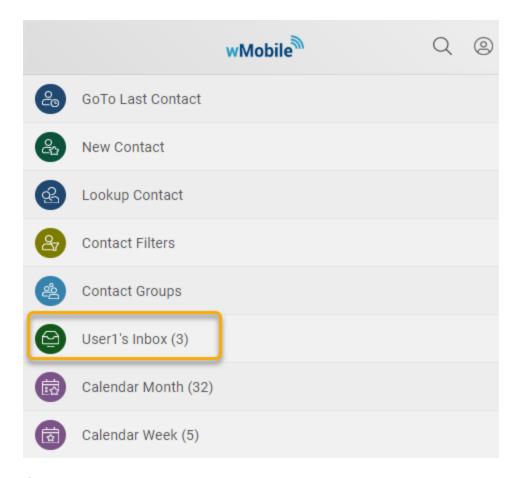
On the Home Menu, a number in parenthesis after the **Email Account Inbox** link indicates the total number of "unread" email messages.

The **User Email Box** link displays for users individually on their Home Menu depending upon the selection in My Preferences. For further information on configuring this in email settings, see the section on how to Add an Email Account.

For details on working with the Email Inbox see:
📄 Email Account Inbox

> 🗒 **NOTE**: The actual email account name for the Inbox that is displayed on the Home Menu will be the **Account Name** that was configured when the email account was created. For information on adding an email account, see: Add Email Account.

5.4.9 GoldMine Inbox

This link will allow you to see email messages you have stored in your **GoldMine Inbox**. If you use GoldMine for email, this is the equivalent of the "Inbox" in the GoldMine Email Center.
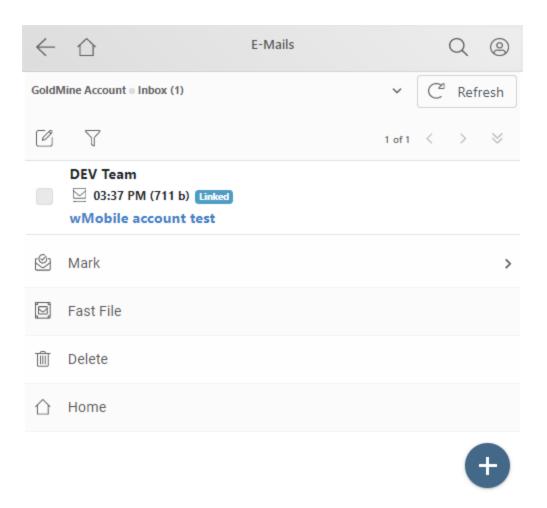
On the Home Menu, a number in parenthesis after the **GoldMine Inbox** link indicates the total number of "unread" email messages.

For details on working with the GoldMine Inbox see:
📄 GoldMine Email Inbox

The **GoldMine Inbox** link is displayed on the user Home Menu depending upon the selection in My Preferences. For further information on configuring this in email settings, see the section on how to Add an Email Account.
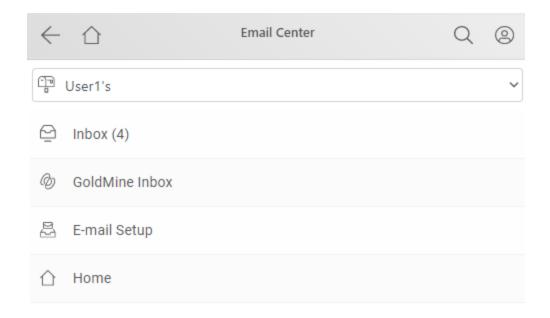
5.4.10 Email Center

From the [Home Menu](#), tap the **Email Center** link to take you to the **Email Center** page.
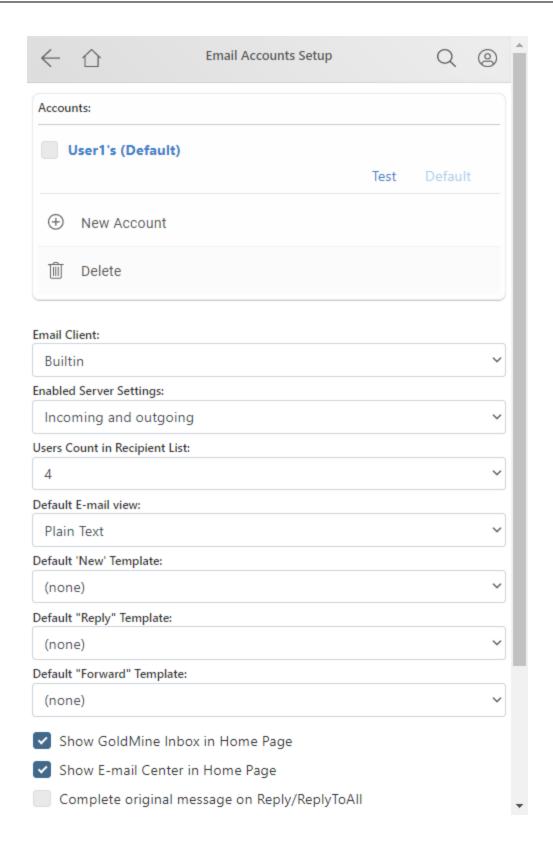
From the Email Center, the user can select which mailbox to view. If multiple email accounts are configured, these can be toggled in the first line using the down arrow. The **Inbox** link will display newly received email on your email server or Internet service provider mailbox. The **GoldMine Inbox** link will display email retrieved and stored in the GoldMine Inbox. The **E-mail Setup** link can be used to navigate to email settings.

Use these links for further information on working with inboxes: Inbox and GoldMine Inbox.
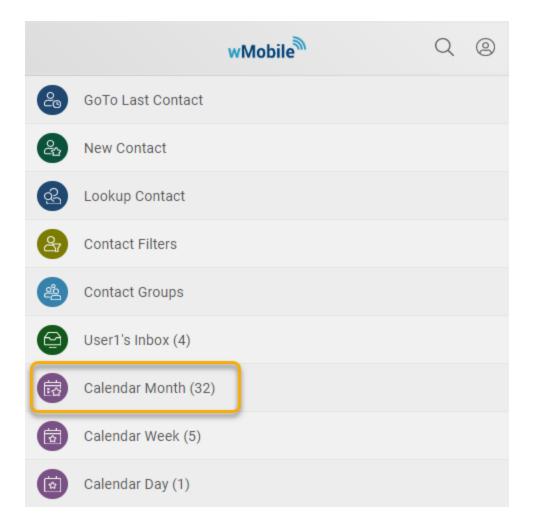
The **Email Center** link is displayed the user's [Home Menu](#) depending upon the selection in [My Preferences](#). For further information on configuring this in email settings, see the section on how to [Add an Email Account](#).

5.4.11 Calendar Month
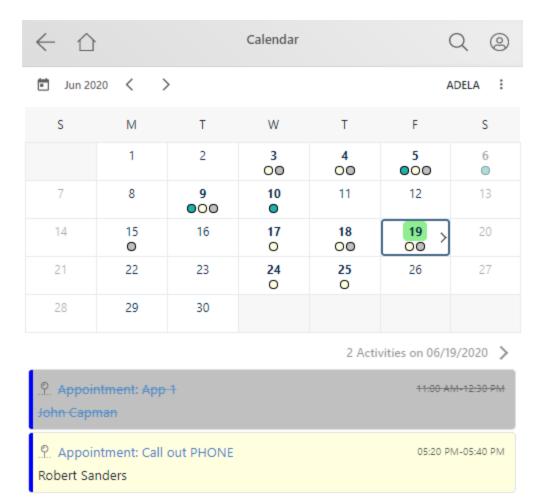
The **Calendar Month** option on the Home Menu will allow you to view all activities for the month. Tap on **Calendar Month** to view the calendar. The number in parentheses is the total number of activities on the user's calendar within this time-frame.

Any day which has activities scheduled will be highlighted in bold. Tap on that date for the Calendar Day view.

The date highlighted in green (as shown below) is the current date. This color can be changed on a per user basis in the Calendar Options settings.

Tap on the arrows [<] and [>] buttons to go back or advance a month for the calendar display.

See Also:
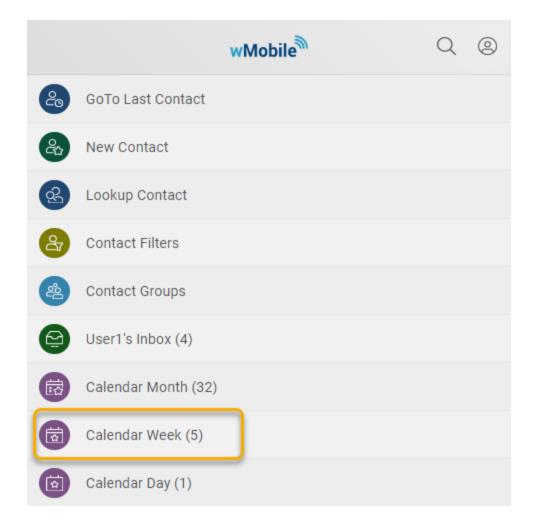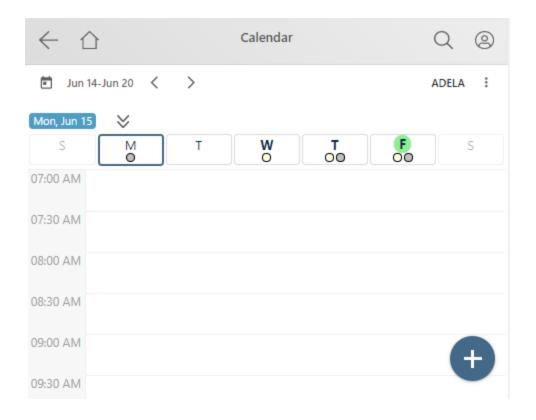
📄 Working with the Calendar: Calendar Month

5.4.12 Calendar Week

The **Calendar Week** option on the Home Menu will allow you to view all activities for the month. Tap on **Calendar Week** to view the calendar. The number in parentheses is the total number of activities on the user's calendar within this time-frame.

Scroll down to see the activities for the week. Tap on the arrows buttons [<] and [>] to go back or advance a week for the calendar display.

See Also:
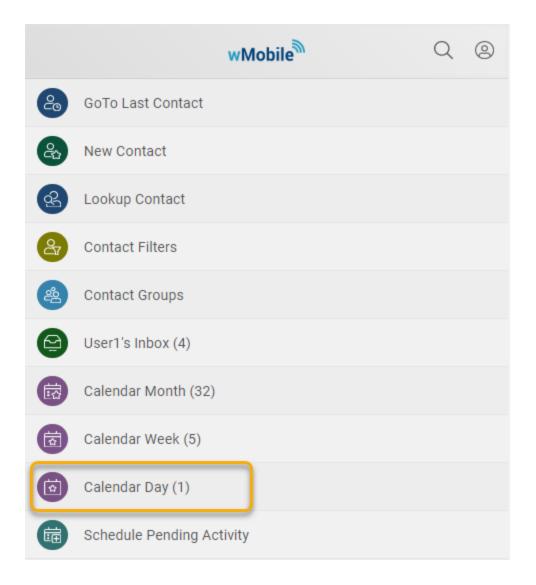
📄 Working with the Calendar: [Calendar Week](#)

5.4.13 Calendar Day
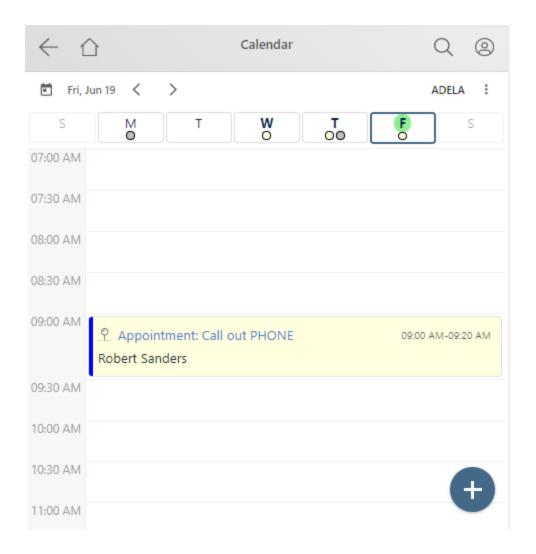
The **Calendar Day** option on the [Home Menu](#) will allow you to view all activities for the month. Tap on **Calendar Day** to view the calendar. The number in parentheses is the total number of activities on the user's calendar within this time-frame.

Scroll down to see the activities for the day.

Tap on the letters to see activities for specific days of the week (e.g., **M** = Monday, **T** = Tuesday, etc.).

Tap on the arrows buttons [<] and [>] to go back or advance a month for the calendar display.

See Also:
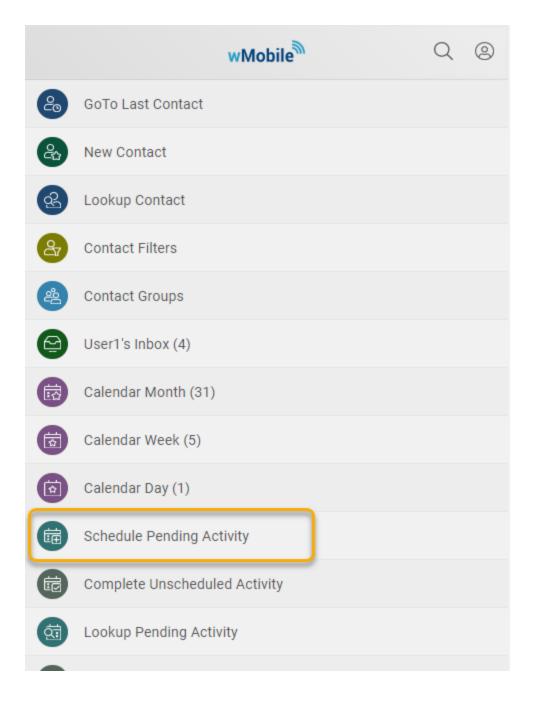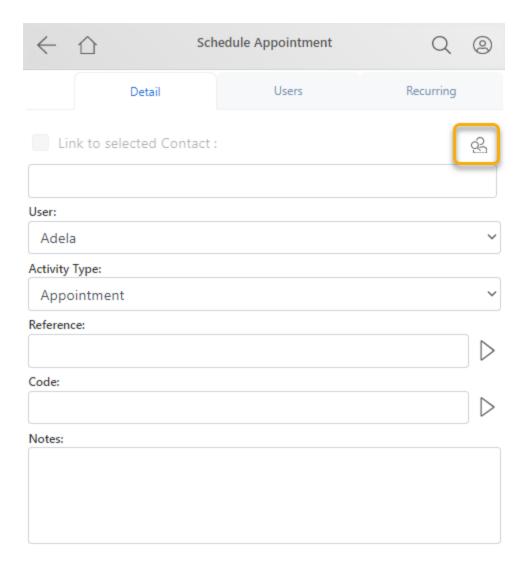
📄 Working with the Calendar: [Calendar Day](#)

5.4.14 Schedule Pending Activity
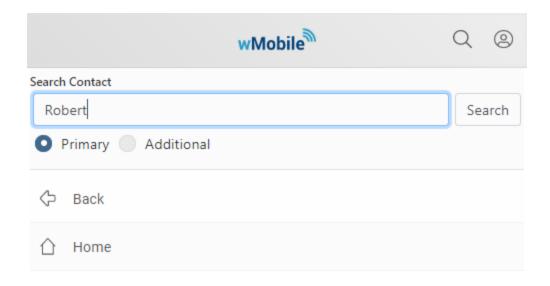
The **Schedule Pending Activity** link allows the user quick access for scheduling an activity directly from the [Home Menu](#).
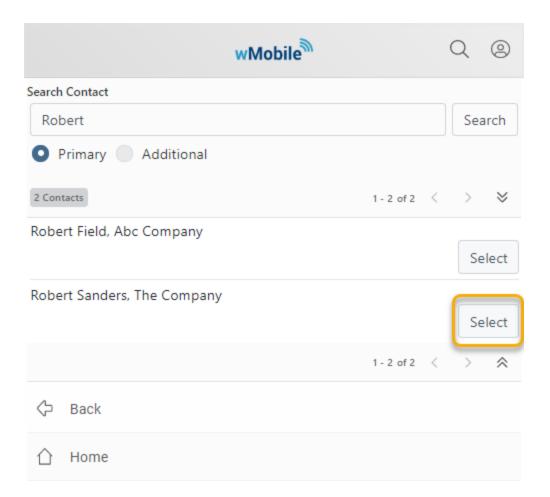
Select the appropriate user for whom the activity will be scheduled. Tap on the magnifying glass icon to search for a contact.
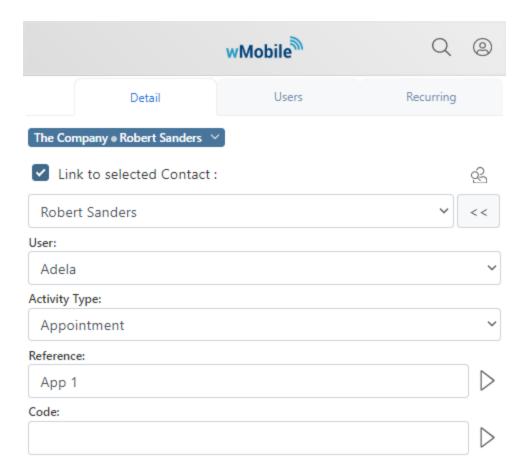
Enter part of the company or contact name to search for the contact.

Select the appropriate contact.
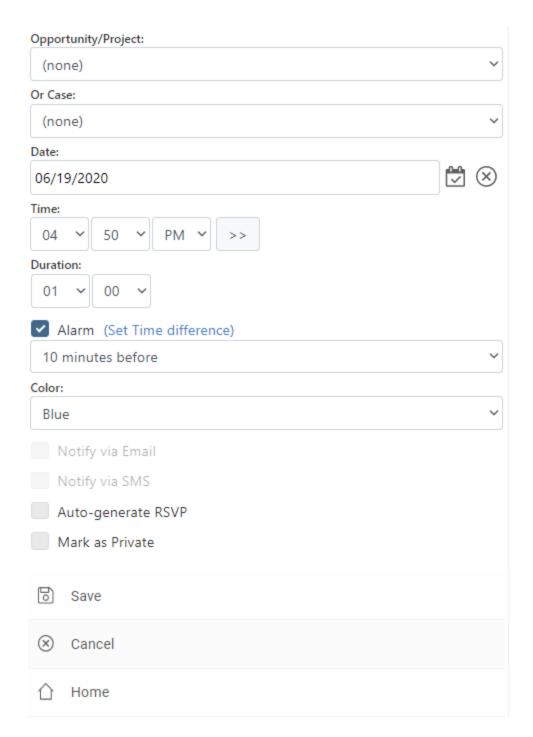
Select the activity type such as Call, Appointment, Next Action.

Enter the reference, codes, and notes as needed. Any field that has a lookup list in GoldMine, will have the same lookup list in wMobile.

Activities can be linked to opportunities or cases.

Select the date, time and duration as needed.

Activities can be alarmed using the Alarm checkbox.

Tap **Schedule** when save the new activity.

Opportunity/Project:

(none)

Or Case:

(none)

Date:

06/19/2020

Time:

04   50   PM   >>

Duration:

01   00

☑ Alarm (Set Time difference)

10 minutes before

Color:

Blue

☐ Notify via Email

☐ Notify via SMS

☐ Auto-generate RSVP

☐ Mark as Private

💾 Save

⊗ Cancel

⌂ Home

5.4.15 Lookup Pending Activity

This feature gives users the ability to search for and view a list of pending activities for a specific user, date range and type of pending activity. Using combinations of the search criteria will allow a user to see only the desired activities.
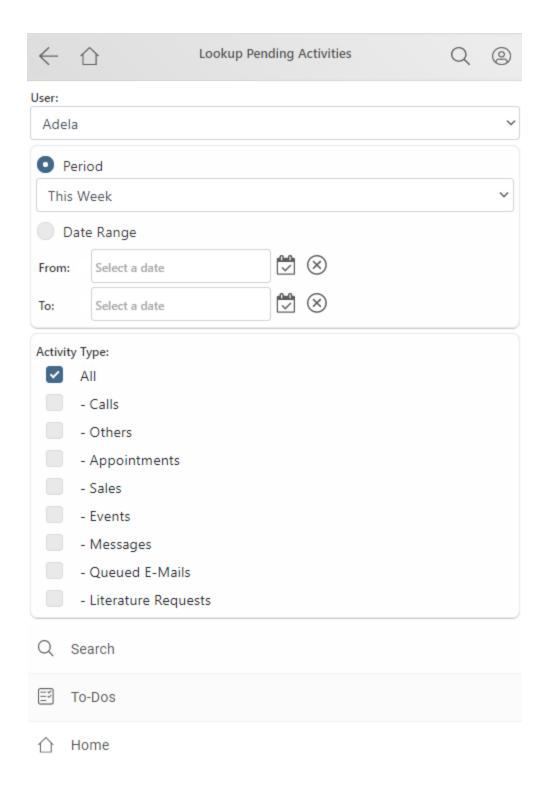
The **Lookup Pending Activity** link allows you to search for pending activities that are scheduled for you or for any GoldMine users on your security team. After selecting a single user (or **(All)** for all users), select the **Period** or **Date Range** and **Activity Type**.

The **Period** drop-down list consists of the selections: **Past Due, Today, Tomorrow, This Week, This Month**, **Next Week**, **0-14 Days, Next 30 Days** and **Next Month**. If a specific date range is desired, tap the **Date Range** radio button and set the date value using the **From** and **To** drop-down lists.
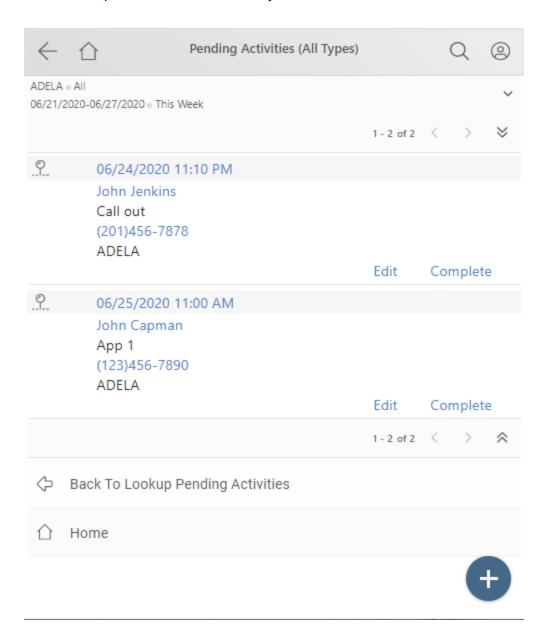
The **Activity Type** drop-down list consists of the selections: **All**, **Calls**, **Others**, **Appointments**, **Sales, Events, Messages, Queued E-Mails** and **Literature Requests**.

Tap **Search** to run the search and display a list of activities.

The **Pending Activities** page displays the resulting list of a pending activity search along with the GoldMine user and the date range used for the search. The pending activities are

listed and a pair of links ([Edit][Complete]) is available for each activity that can be used to Edit or Complete the selected activity.

See Also:
📄 Editing Pending Activities
📄 Completing Pending Activities

5.4.16 Lookup History Activity

This feature gives users the ability to search for and view a list of history records for completed activities for a specific user, date range and type of history activity. Using combinations of the search criteria will allow a user to see only the desired activities.

The **Lookup History Activity** link allows a search for history activities that were scheduled for you or for any GoldMine users on your security team.
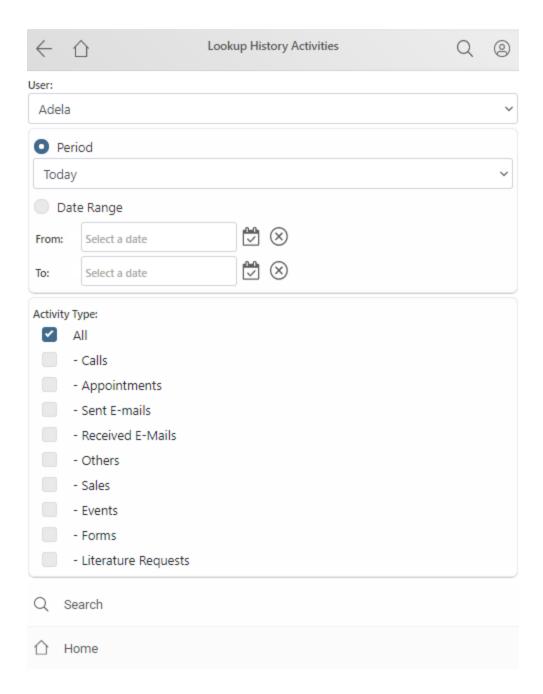
After selecting a single user (or **(All)** for all users), select the **Period** or **Date Range** and **Activity Type**.
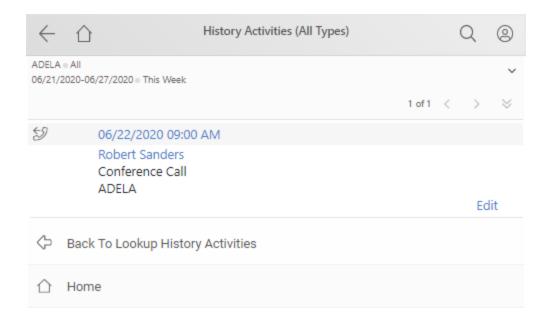
The **Period** drop-down list consists of the selections: **Last Month**, **Last Week**, **Yesterday**, **Today**, **This Week** and **This Month**. If a specific date range is desired, tap the **Date Range** radio button and set the **From** and **To** date drop-down values.

The **Activity Type** drop-down list consists of the selections: **All**, **Calls**, **Appointments**, **Sent E-mails**, **Received E-Mails**, **Others**, **Sales**, **Events**, **Forms** and **Literature Requests**.

Tap the Search button to run the search and display a list of activities.

The resulting list of a history activity search displays the user and the date range used by the search. The history activities are listed and an [Edit] link is available for each activity that can be used to Edit the selected activity.

See Also:
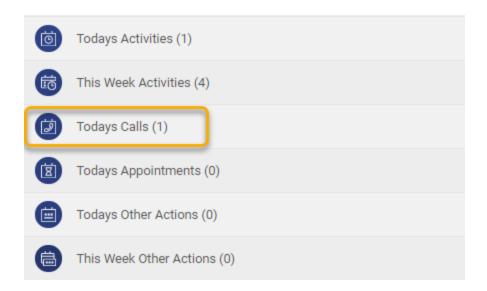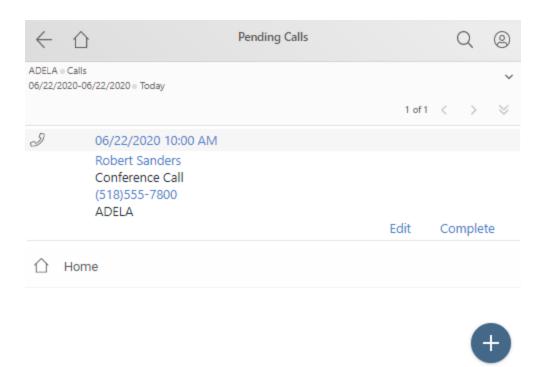
📄 Editing History Activities

5.4.17 Today's Calls

This link displays a list of pending calls that are scheduled for the logged in user today. On the Home Menu, a number in parenthesis after the **Today's Calls** link indicates how many calls are scheduled. For example: "**Today's Calls (2)**" would indicate there are two calls scheduled for today.

To the right of each scheduled activity in the list are the [Edit][Complete] commands. At the bottom of the list is the "**+**" button to create a new activity.
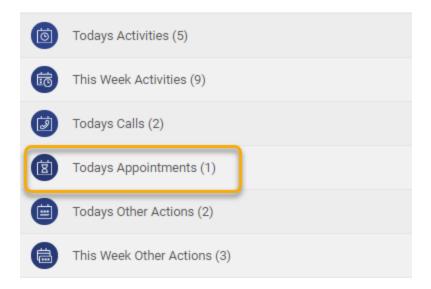
See Also:
📄 Editing Pending Activities
📄 Completing Pending Activities
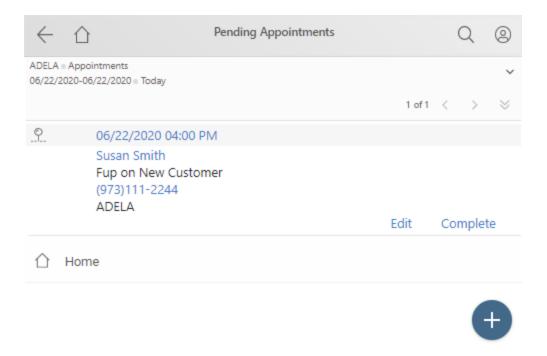
5.4.18 Today's Appointments

This link displays a list of pending appointments that are scheduled for the logged in user today. On the Home Menu, a number in parenthesis after the **Today's Appointments** link indicates how many appointments are scheduled. For example: "**Today's Appointments (1)**" would indicate there is one appointment scheduled for today.

To the right of each scheduled activity in the list are the [Edit][Complete] commands. The "**+**" button to create a new activity is located at the bottom of the list.

See Also:

📄 Editing Pending Activities
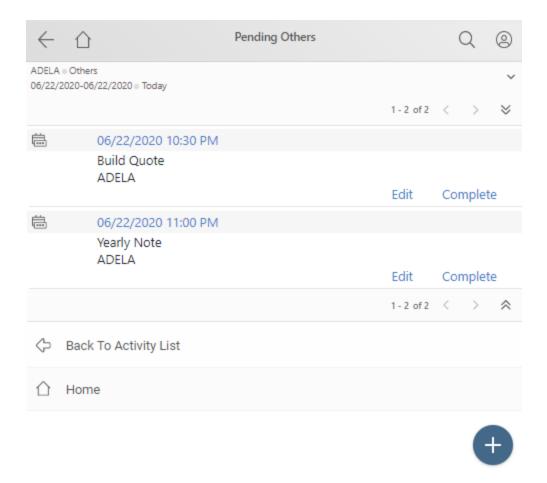
📄 Completing Pending Activities

5.4.19 Today's Other Actions

This link displays a list of pending other actions that are scheduled for the logged in user today. On the Home Menu, a number in parenthesis after the **Today's Other Actions** link indicates how many calls are scheduled. For example: "**Today's Other Actions (2)**" would indicate there are two other actions scheduled for today.

🕘	Todays Activities (5)
📅	This Week Activities (9)
📞	Todays Calls (2)
📇	Todays Appointments (1)
📆	Todays Other Actions (2)
📅	This Week Other Actions (3)

To the right of each scheduled activity in the list are the [Edit][Complete] commands. The "**+**" button to create a new activity is located at the bottom of the list.

See Also:

📄 [Editing Pending Activities](#)
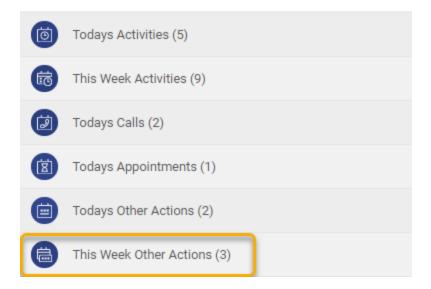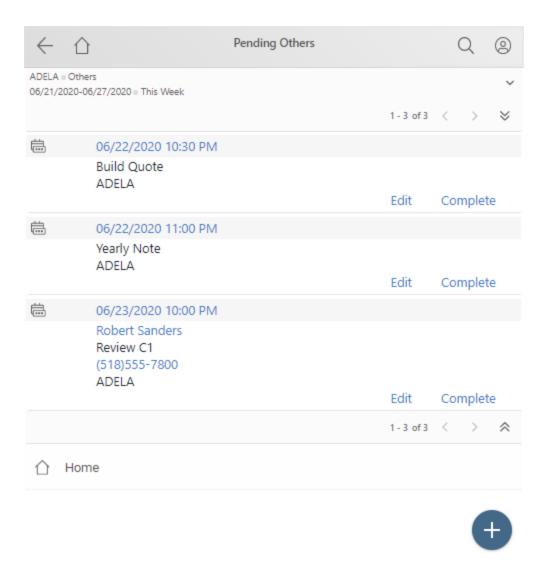
📄 [Completing Pending Activities](#)

5.4.20 This Week's Other Actions

This link displays a list of pending other actions that are scheduled for the logged in user this week. On the [Home Menu](#), a number in parenthesis after the **This Week's Other Actions** link indicates how many other actions are scheduled. For example: "**This Week's Other Actions (3)**" would indicate there are three other actions scheduled for this week.

To the right of each scheduled activity in the list are the [Edit][Complete] commands. The "**+**" button to create a new activity is located at the bottom of the list.

See Also:

📄 Editing Pending Activities
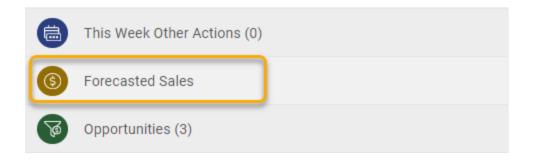
📄 Completing Pending Activities

5.4.21 Forecasted Sales
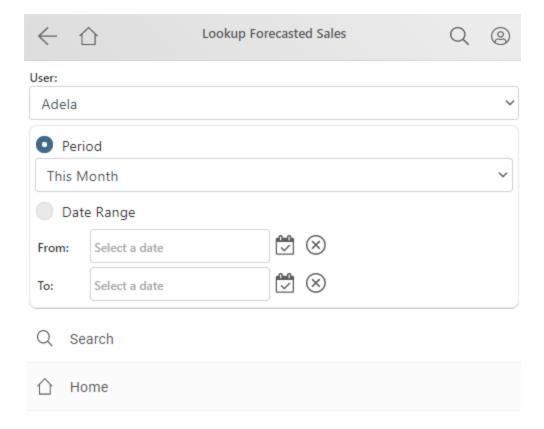
The **Forecasted Sales** link allows a user to search for forecasted sale activities that were scheduled for the logged in user or for any other GoldMine users on your security team.
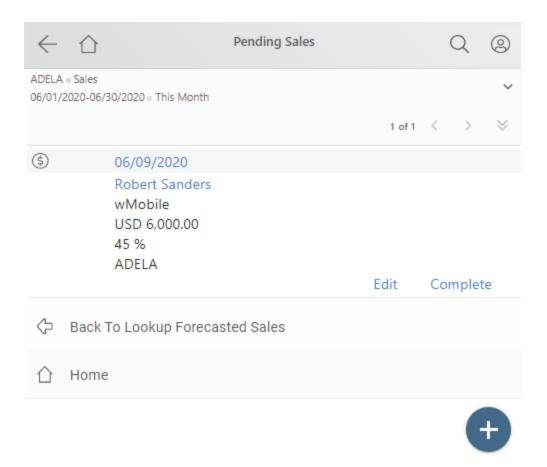
After selecting a single user (or **(All)** for all users), select the **Period** or **Date Range** and **Activity Type**.

The Period drop-down list consists of the selections: **This Month**, **Next Month**, **This Quarter**, **Next Quarter, Next 30 days, 31-60 Days**, **61-90 Days**, and **Past Due**. If a specific date range is desired, tap the Date Range radio button and set the date drop-down's value.

Tap the **Search** button to run the search and return a list of activities.

The resulting list of a forecasted sales search displays the user and the date range used by the search. The forecasted sales are listed and a pair of links ([Edit][Complete]) is available for each activity that can be used to Edit or Complete the selected activity.
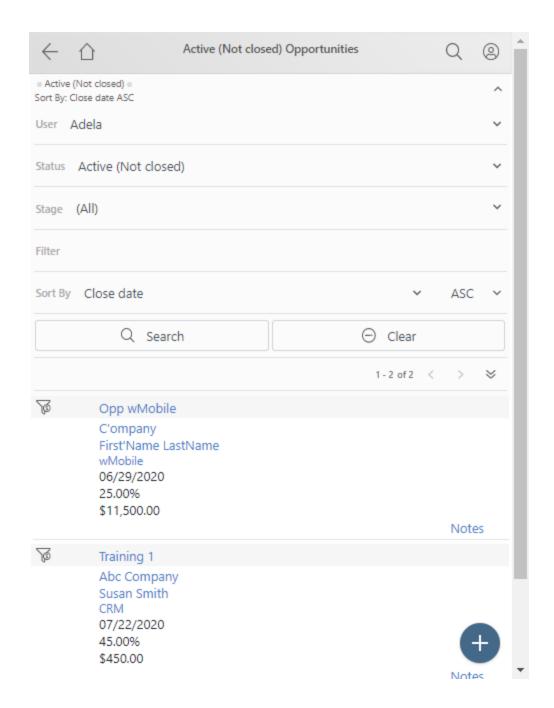
See Also:
📄 Editing Pending Activities
📄 Completing Pending Activities

5.4.22 Opportunities
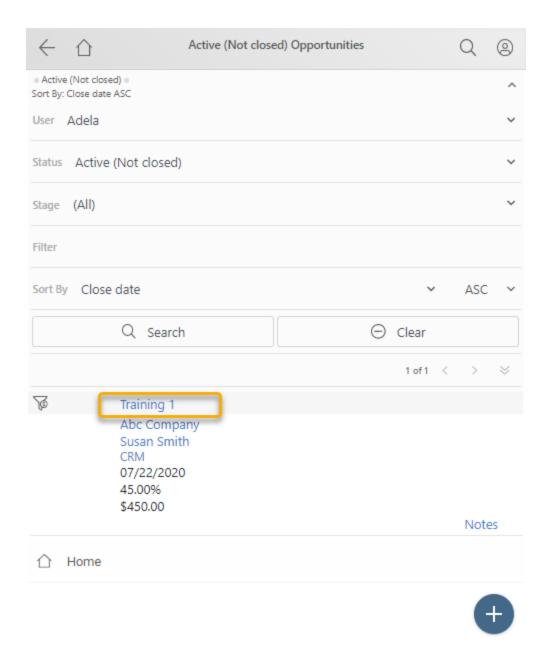
Select **Opportunities** from the Home Menu menu to view Opportunities. The number in parentheses represents the number of Opportunities.
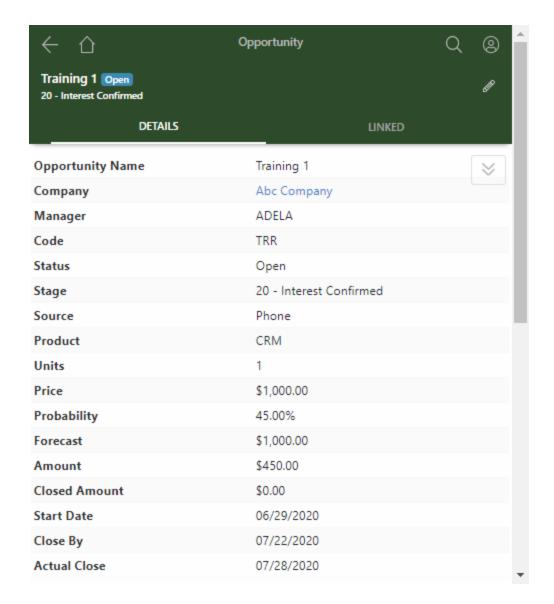
Filter the Opportunities by **User**, **Status**, **Stage**, **Sort By** (Close Date, Name, Company, Contact, Value, Probability) and select **ASC** (Ascending) or **DESC** (Descending) order.
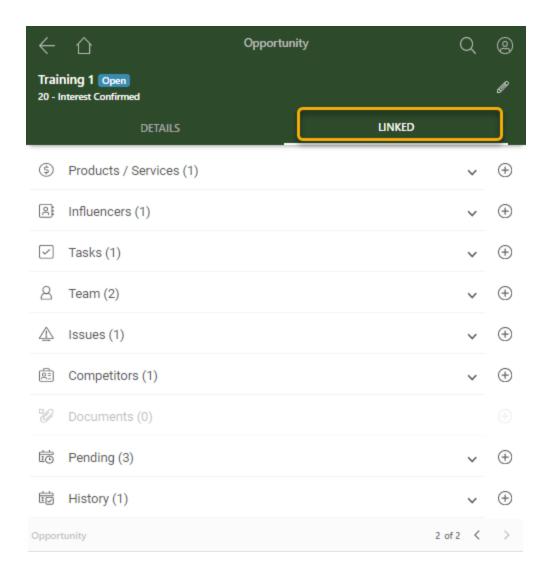
The opportunities that match the criteria will be listed.
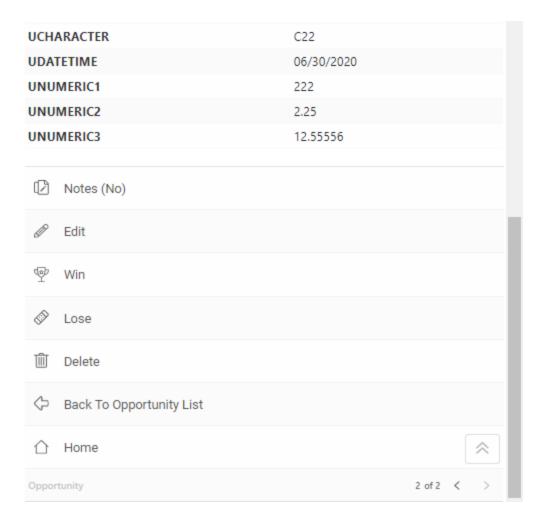
Tap on an Opportunity name to view further details of the opportunity or to edit the opportunity.

If the opportunity is opened, additional opportunity data will be displayed in the **LINKED** tab. Tap on the down arrow in the relevant section to see additional details such as Influencers, Team members, Issues, Pending/History activities related to the Opportunity, etc. New details can also be added by tapping on the " **+** " button.

In the DETAILS tab, on the bottom menu are the options to add **Notes**, **Edit** the Opportunity, change the status to **Win** or **Lose** the opportunity, go **Back to Opportunity List**, or back to the Home Menu.

UCHARACTER	C22
UDATETIME	06/30/2020
UNUMERIC1	222
UNUMERIC2	2.25
UNUMERIC3	12.55556

	Notes (No)
	Edit
	Win
	Lose
	Delete
	Back To Opportunity List
	Home

Opportunity   2 of 2 <   >
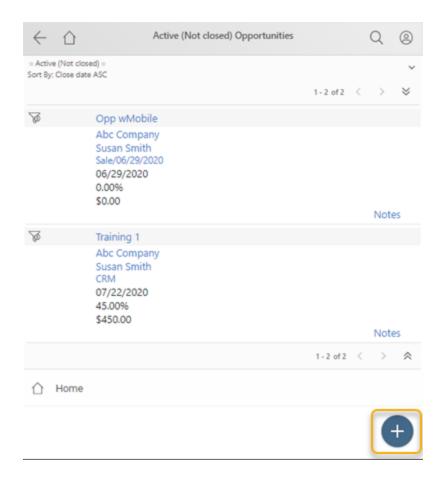
See Also:

📄 Creating a New Opportunity

5.4.22.1 New Opportunity
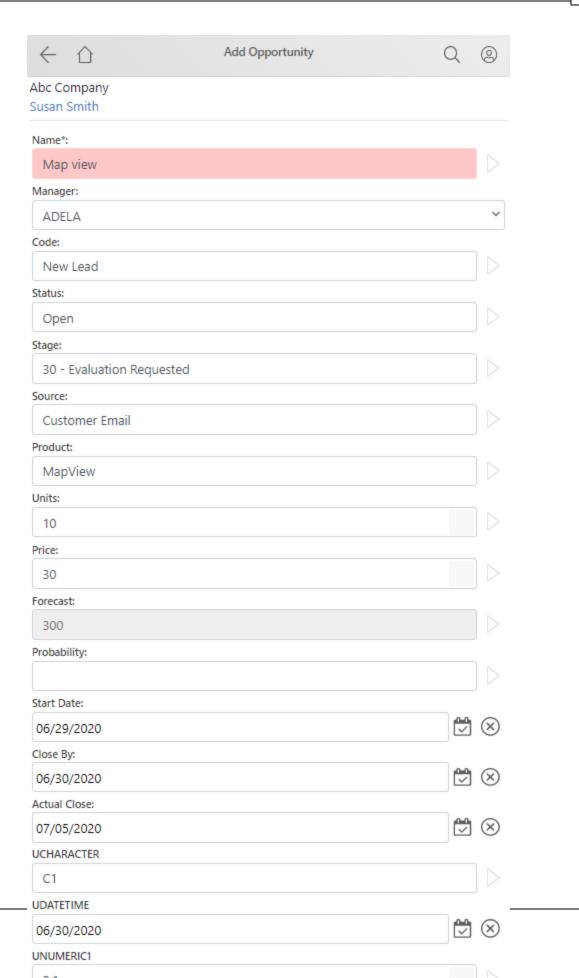
At the bottom of the list of Opportunities is the " **+** " button to create a **New Opportunity**.

After selecting **New Opportunity**, the user is presented with the **Search Contact** page. Search for the contact to be linked to the opportunity and a list of results will be displayed. From the results list, tap the **Select** button of the contact to link to the opportunity being created.
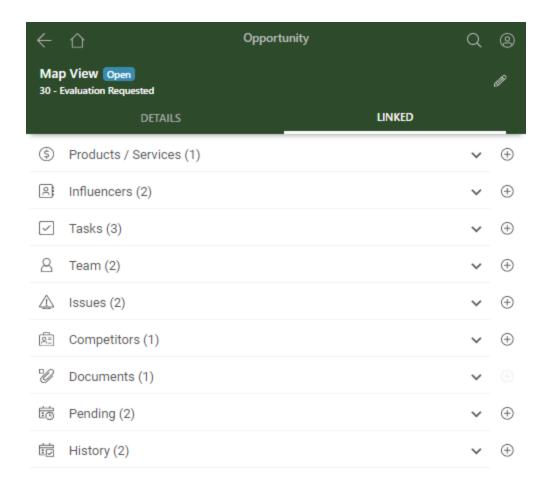
Fill in the Opportunity fields as you would in GoldMine. Any field that has a lookup list in GoldMine will have the same lookup list in wMobile. When all data is entered, tap the **Save** link at the bottom of the page. Note custom Opportunity fields added in GoldMine are also available.

← ⌂   **Add Opportunity**   🔍 ⊙

Abc Company
Susan Smith

Name*:

Map view   ▷

Manager:

ADELA   ⌄

Code:

New Lead   ▷

Status:

Open   ▷

Stage:

30 - Evaluation Requested   ▷

Source:

Customer Email   ▷

Product:

MapView   ▷

Units:

10   ▷

Price:

30   ▷

Forecast:

300   ▷

Probability:

                                                           ▷

Start Date:

06/29/2020   📅 ⊗

Close By:

06/30/2020   📅 ⊗

Actual Close:

07/05/2020   📅 ⊗

UCHARACTER

C1   ▷

UDATETIME

06/30/2020   📅 ⊗

UNUMERIC1

The new opportunity will be displayed in the list of Opportunities. Tap on the name of the opportunity, in this case "Mapview", to add further details.
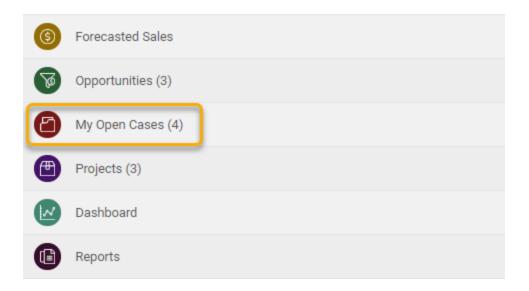
From here, information can be updated and added. Add Influencers, Products/Services, Team members, schedule activities linked to the opportunity from Pending, and more from **LINKED** tab.

5.4.23 Cases
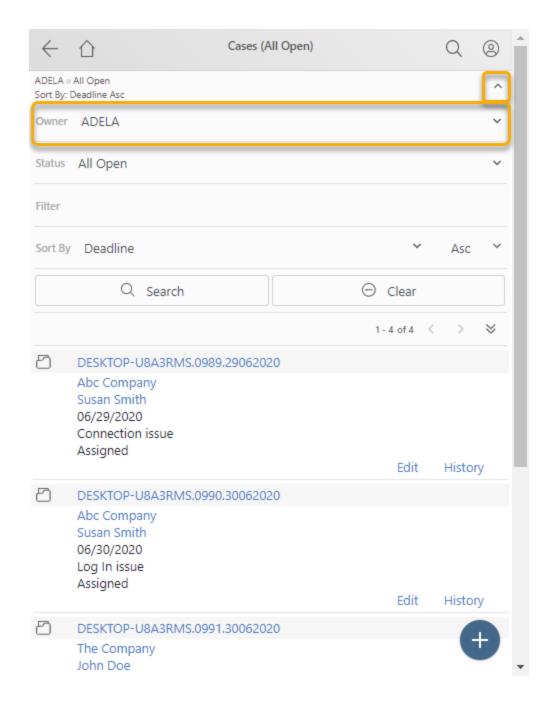
Select **My Open Cases** from the [Home Menu](#) menu to view Cases. The number in parentheses represents the number of Cases.
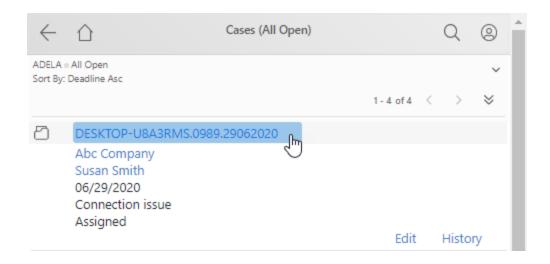
Tap on the arrow to open the filter zone.
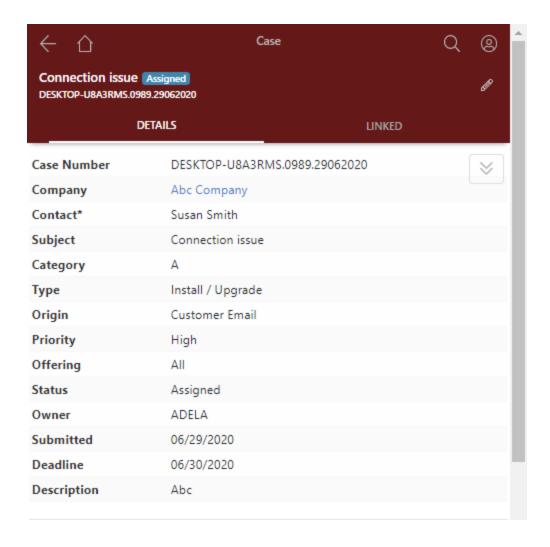
 Select the appropriate **user** and any other desired criteria to view specific cases. From this page, the **New Case** (available at the bottom of the page) the " **+** " button can be used to create a new case.
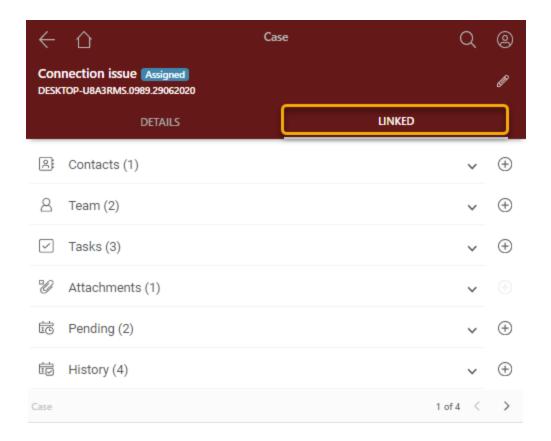
The cases that match the criteria will be listed. Tap on a Case name to view further details of the case or tap **Edit** to update the case.
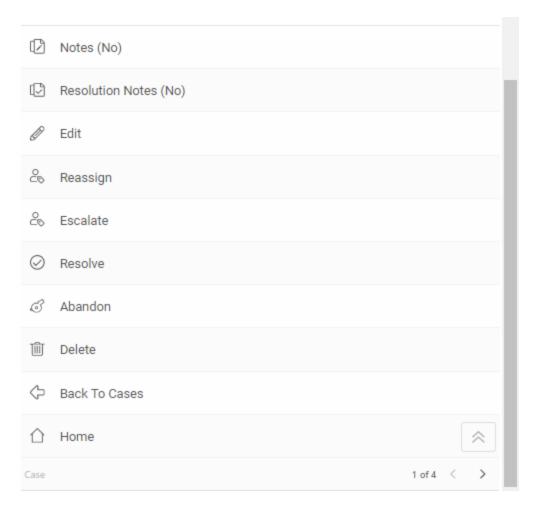
If the case is opened, additional case data will be displayed.

Select **LINKED** tab to see Additional Contacts, Team members, Pending/History, Attachments, etc. related to the Case. Tap on the down arrow in the relevant section to expand the list. New details can also be added by tapping on the " **+** " button next to the relevant section.
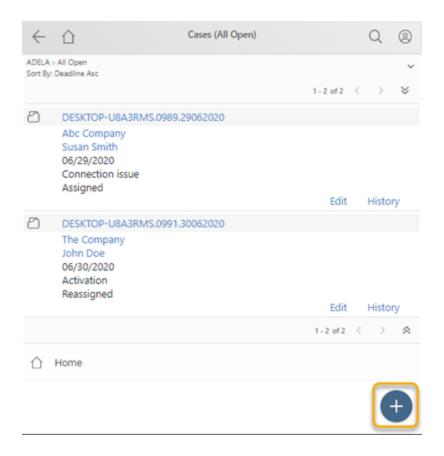
In the DETAILS tab, on the bottom menu are the options to add **Notes**, **Resolution Notes**, **Edit** the case, **Reassign**, **Escalate**, **Resolve**, **Abandon**, **Delete**, go **Back to Cases**, or back to the [Home Menu](#).
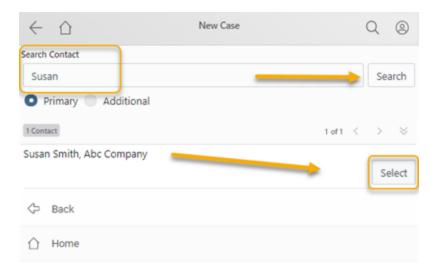
5.4.23.1 New Case

At the bottom of the list of Cases is the " **+** " button that allows the user to create a **New Case**.
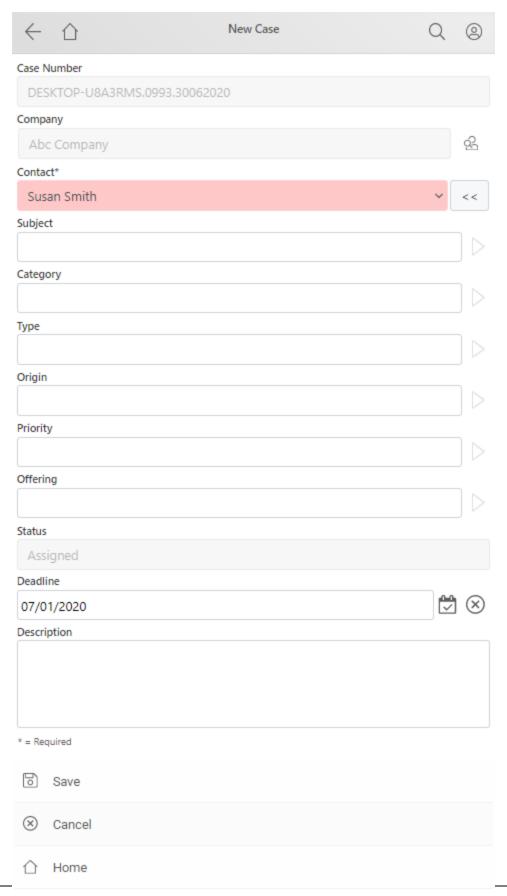
After selecting **New Case**, the user is presented with the **Search Contact** page. Search for the contact to be linked to the case and a list of results will be displayed. From the results list, tap the **Select** button of the contact to link to the case being created.

The New Case page will open. On this page, make edits as required which can include setting the **Subject**, **Category**, **Type**, **Origin**, **Priority**, **Offering**, **Deadline**, and **Description** (all displayed as drop-downs).

On the bottom of the page are commands to **Save**, **Cancel**, or go back to the Home Menu.

← ⌂   New Case   🔍   ⊙

Case Number

DESKTOP-U8A3RMS.0993.30062020

Company

Abc Company

Contact*

Susan Smith   ▾   <<

Subject

Category

Type

Origin

Priority

Offering

Status

Assigned

Deadline

07/01/2020   📅 ⊗

Description

* = Required

💾 Save

⊗ Cancel

⌂ Home

See Also:
📄 [Creating a New Case](#)

5.4.24 Projects
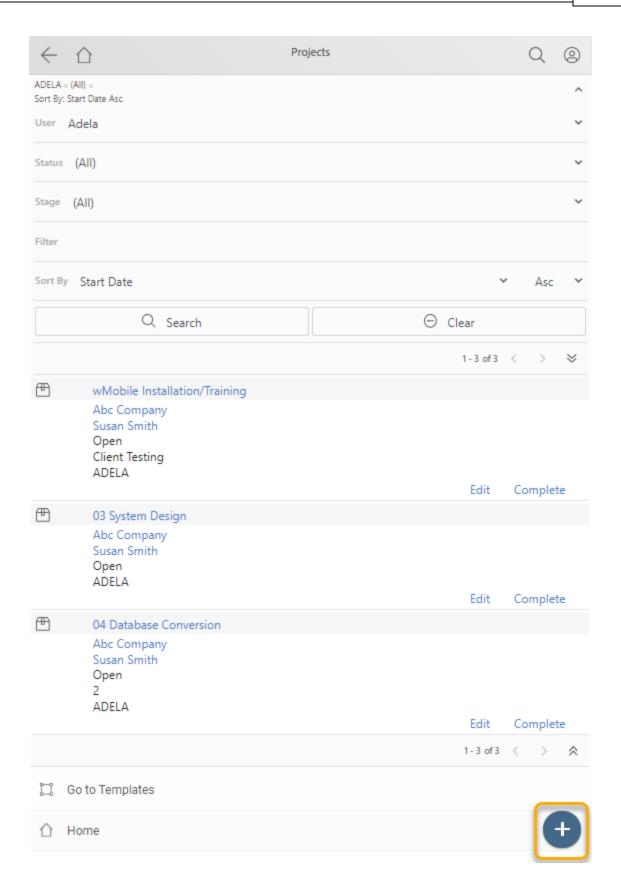
The Projects can be selected from the [Home Menu](#).

Tap on the arrow to select the desired filter criteria to view specific projects.

The projects that match the criteria will be listed.
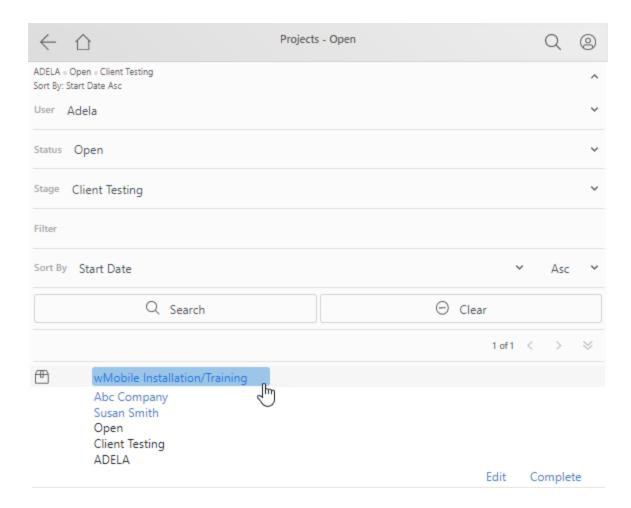
To Create a New Project, use the " **+** " button at the bottom of the project list. At this step you can choose to create an **Empty Project** or **Search Template.**
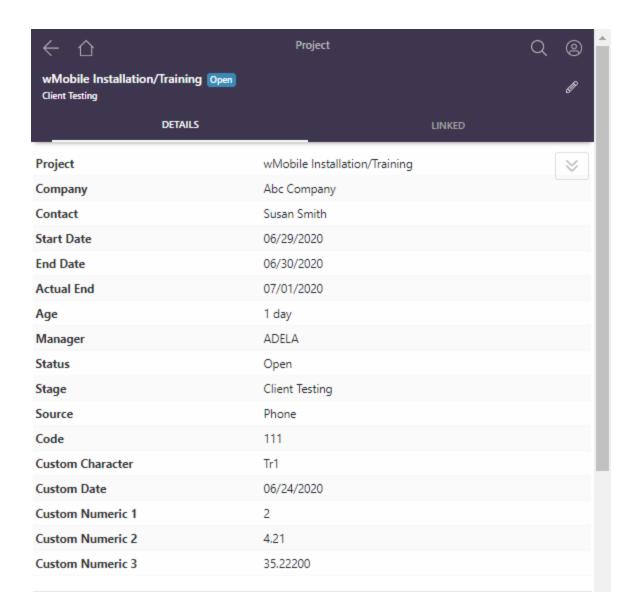
See Also:
📄 Creating a New Project
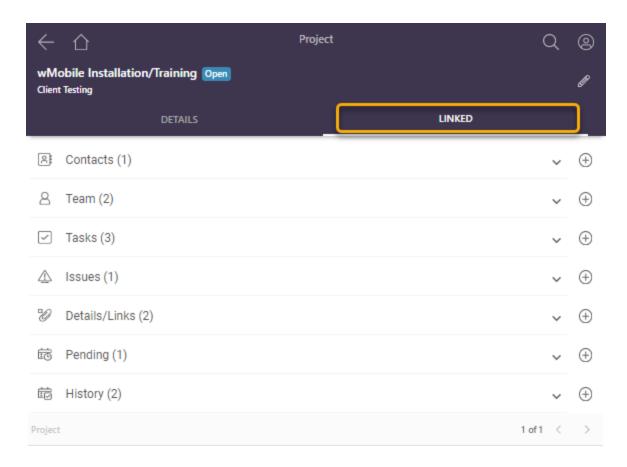
Tap on a Project name to view further details of the project or tap **Edit** to update the project or to **Complete** it.
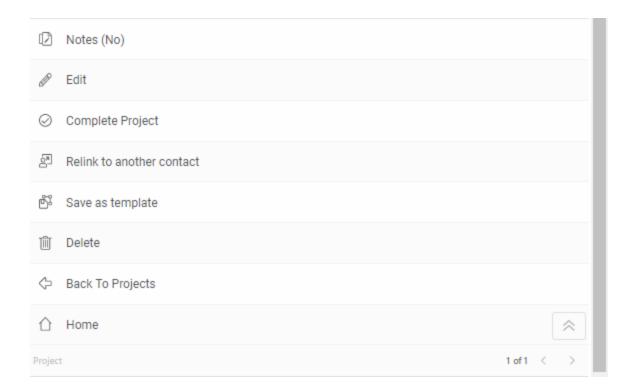
If the project is opened, additional case data will be displayed.

Select **LINKED** tab to see additional Contacts, Pending, History, Links, etc. New details can also be added by tapping on the " **+** " button next to the relevant section.

In the DETAILS tab, on the bottom menu are the options to add **Notes**, **Edit** the Project, **Complete Project**, **Relink to another contact**, **Save as template**, Delete (if the user has permission to use this action), go **Back to Project List**, or back to the [Home Menu](#).

See Also:
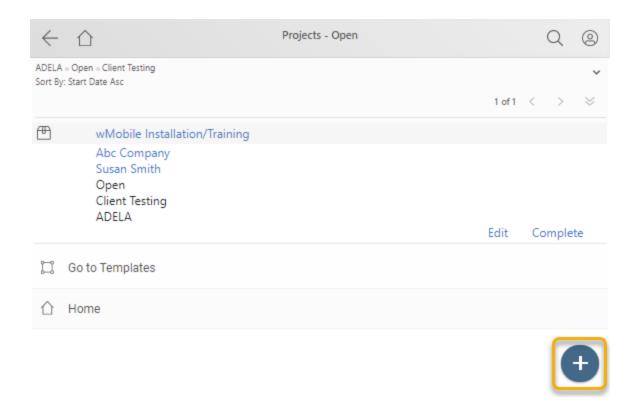
📄 <u>Creating a New Project Template</u>

5.4.24.1 New Project
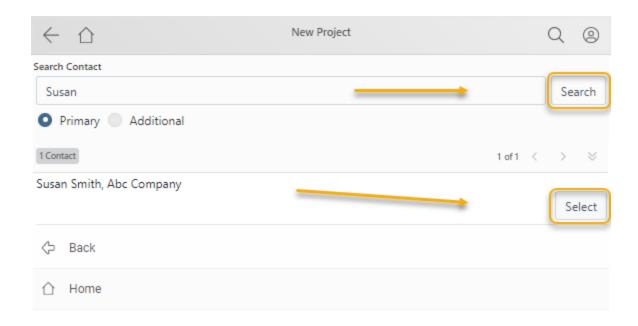
At the bottom of the list of Projects is the " **+** " button that allows the user to create a New Project.

After selecting **New Project** ("+" button), tap on **Empty Project.**
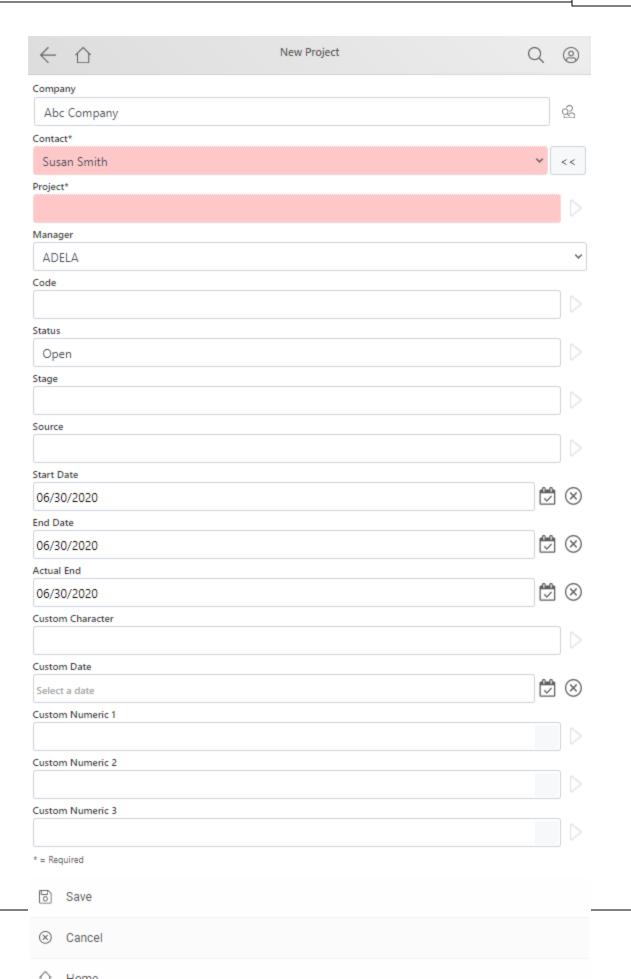
The user is presented with the **Search Contact** page. Search for the contact to be linked to the opportunity and a list of results will be displayed. From the results list, tap the **Select** button of the contact to link to the opportunity being created.

Fill in the Project fields as you would in GoldMine. Any field that has a lookup list in GoldMine will have the same lookup list in wMobile.

On the bottom of the page are commands to **Save**, **Cancel**, or go back to the Home Menu.

← ⌂   New Project   🔍 👤

Company

Abc Company   👥

Contact*

Susan Smith   ⌄   <<

Project*

[   ] ▷

Manager

ADELA   ⌄

Code

[   ] ▷

Status

Open   ▷

Stage

[   ] ▷

Source

[   ] ▷

Start Date

06/30/2020   📅   ⊗

End Date

06/30/2020   📅   ⊗

Actual End

06/30/2020   📅   ⊗

Custom Character

[   ] ▷

Custom Date

Select a date   📅   ⊗

Custom Numeric 1

[   ] ▷

Custom Numeric 2

[   ] ▷

Custom Numeric 3

[   ] ▷

* = Required

💾 Save

⊗ Cancel

⌂ Home
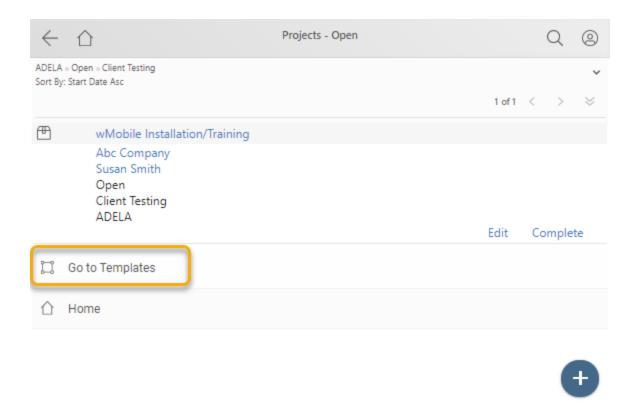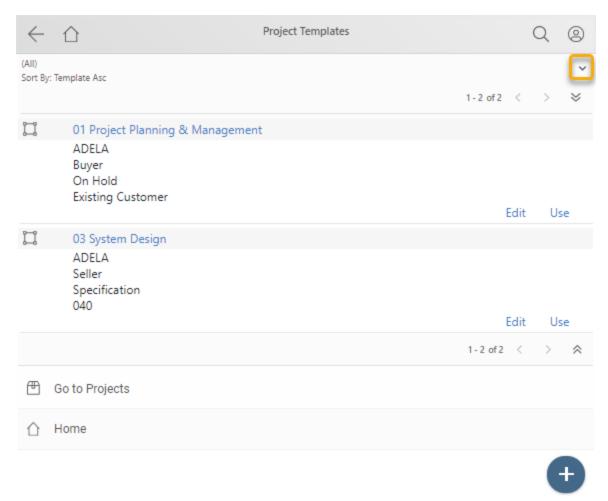
5.4.24.2 Project Templates

Project templates are created and used to save time. If the same fields and related details are always added for a type of project, using Project templates to pre-fill that information can make creating new projects faster.
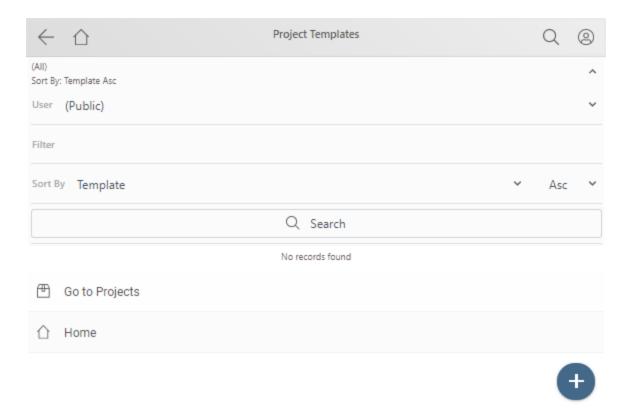
The project templates list can be accessed from the Projects page by selecting **Go to Templates**.
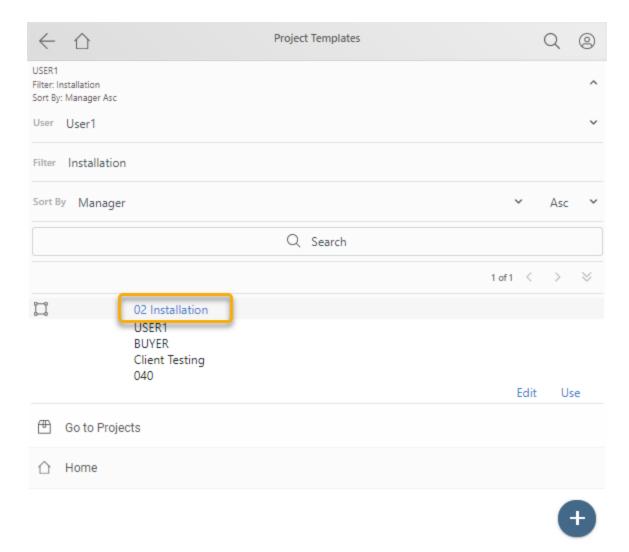
The project templates can be filtered by tapping on the arrow button.
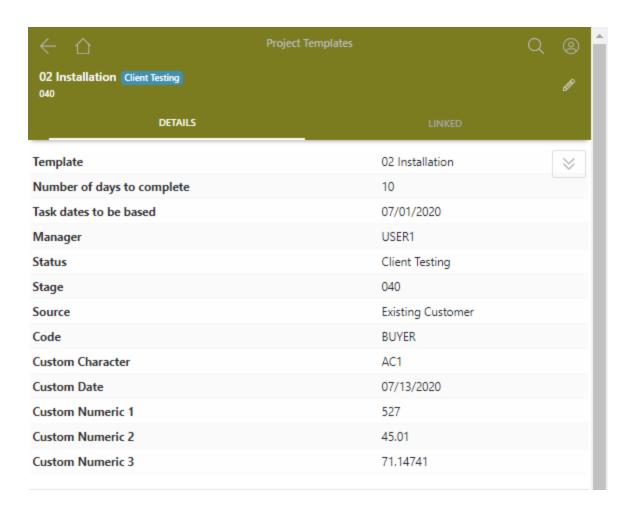
Enter filter criteria and select **Search**. The project templates that match the criteria will be listed.
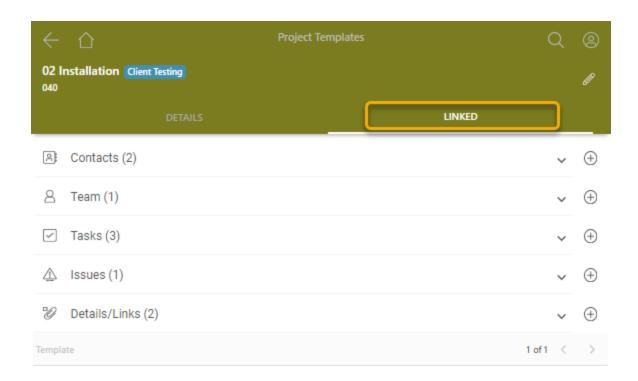
Tap on a Project Template name to view further details. Tap on **Edit** to update the project template fields or **Use** the project template.

If the project templates is opened, additional project template data will be displayed.

Select **LINKED** tab to see additional Contacts, Team, etc. New details can also be added by tapping on the " **+** " button next to the relevant section.
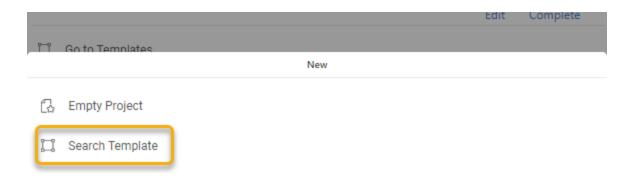
In the DETAILS tab, on the bottom menu are the options to add **Notes**, **Edit** the Project Template, **Use** it, **Delete** (if the user has permission to use this action), go **Back to Templates**, or back to the [Home Menu](#).

A project template can be used when a new project is created. From the project list select the " **+** " button and then select **Search template.**

The Project Templates page will be opened and from there the user can choose a specific project templates. The values of the project template will be applied to the new Project.
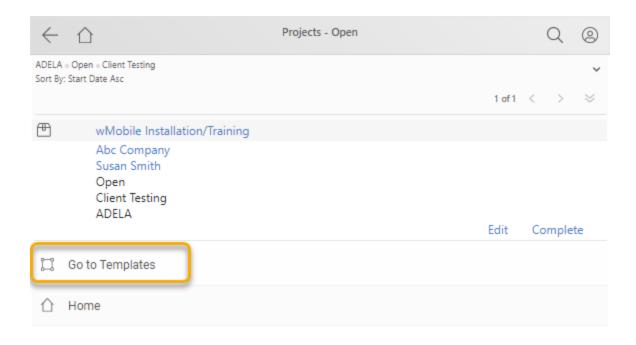
See Also:
📄 [Creating a New Project Template](#)
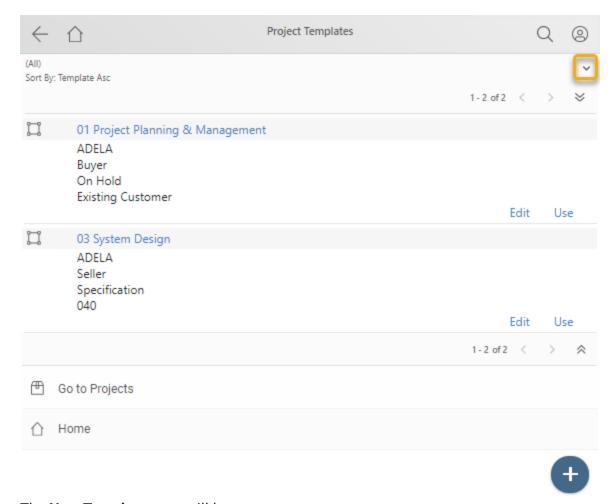
5.4.24.2.1 New Project Template

To create a new template, use **Go to Templates**.
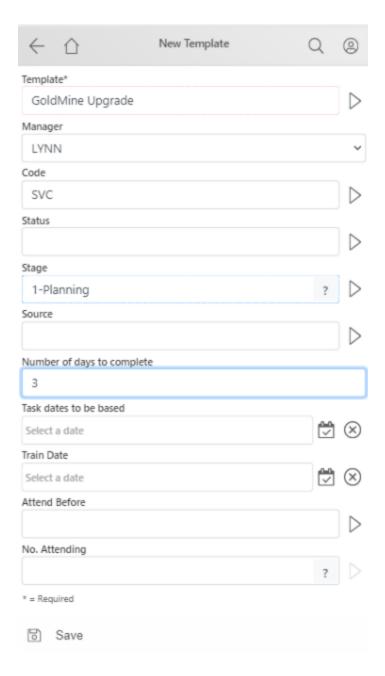
The " **+** " button allows the user to create a new project template, available at the bottom of the page.

To create a new project template tap on the " **+** " button.
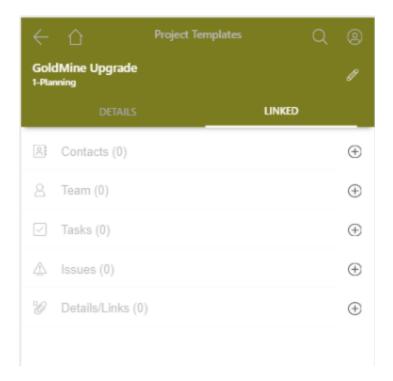
The **New Template** page will be open.
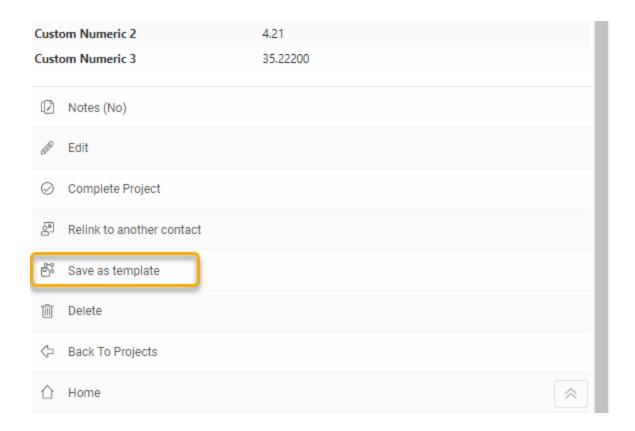
Fill in the appropriate fields to be pre-filled in the template and then select **Save**.

After the template is saved, additional steps can be added to the template such as Team members, Tasks etc. Tap on the " **+** " button next to the relevant section on the LINKED tab.

If you have a project that you think would make a good template for future use, this is easily done from the **DETAILS** tab. Tap on **Save as template**, found at the bottom of the **DETAILS** tab.

| Custom Numeric 2 | 4.21 |
| Custom Numeric 3 | 35.22200 |

🗎	Notes (No)
✎	Edit
⊘	Complete Project
🗗	Relink to another contact
🗗	Save as template
🗑	Delete
↩	Back To Projects
⌂	Home
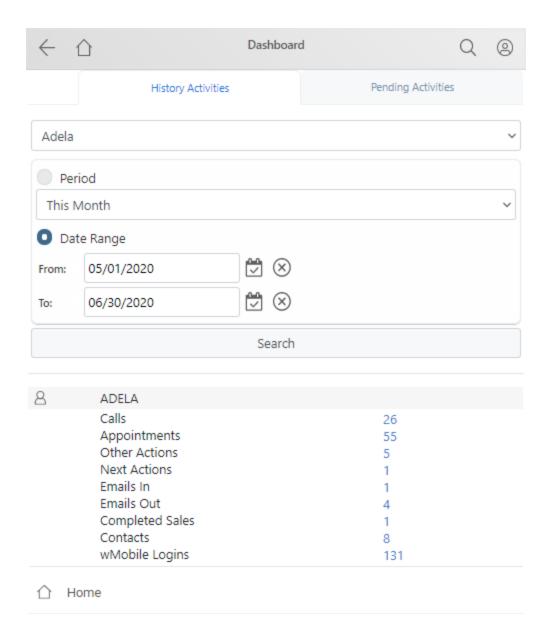
5.4.25 Dashboard

The **Dashboard** link in wMobile offers a quick view of history and pending metrics from GoldMine.

🗄	Projects (19)
📈	Dashboard
🗐	Reports

You may view your own or any team member's key GoldMine productivity numbers. You can drill down on the metrics numbers to review the details behind the numbers.

After tapping one of the numbers (which is a count of an activity type's records), another screen will appear displaying a list of items based on the type of activity for the number you selected. The activities are listed and an **[Edit]** link is available for each activity that can be used to edit the selected activity. Select either tab to display the metrics desired: History Activities or Pending Activities.

See Also:
📄 Editing History Activities
📄 Editing Pending Activities

5.4.26 Reports

wMobile Phone supports running Crystal Reports. The Crystal Reports Runtime engine must be installed for the Reports functionality to work.
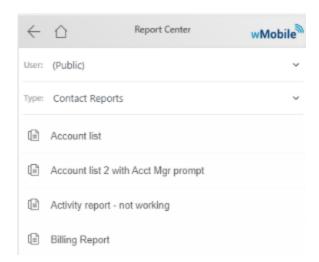
The reports themselves must be written using Crystal Reports tools and then stored/maintained in GoldMine. Once the reports are accessible for use in GoldMine, they can then be accessed using **Reports** from the wMobile Home Menu.

To access a specific report, select the appropriate user library and category the report was filed to.
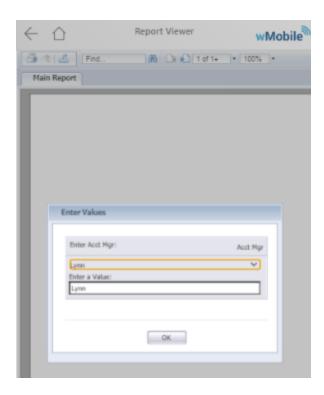
Only Crystal Reports will appear on this list.

To run a report, tap the report name link (for the following example, "**Account List with Account Mgr Prompt**" was used).

If the report requires any parameters to be selected (**State** in this example) the user will be prompted. After the parameters are set, tap **OK**:
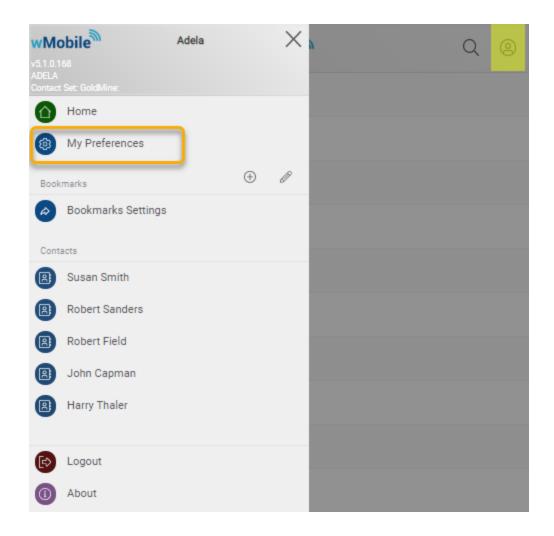
The report will be generated and then displayed. The Crystal Reports Runtime provides the report navigation tools like paging through the report, zoom level, find, and more:
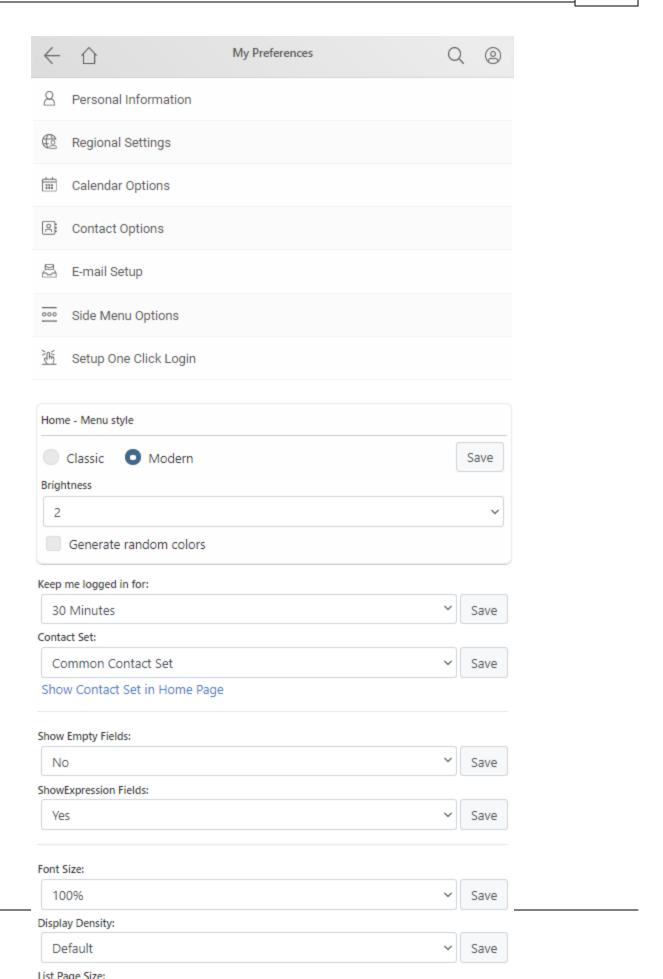
5.4.27 My Preferences

The **My Preferences** link can be selected from the user menu (side menu) on the wMobile
[Home page]. This will give the logged in user access to the **My Preferences** page where
that user can make adjustments to their own settings. The settings made here are only for
the logged in user and will not affect other users.

Tapping **My Preferences** opens the following page (see below for links to the individual options and settings):

My Preferences

- Personal Information
- Regional Settings
- Calendar Options
- Contact Options
- E-mail Setup
- Side Menu Options
- Setup One Click Login

Home - Menu style

○ Classic   ● Modern | Save |

Brightness

| 2 |

☐ Generate random colors

Keep me logged in for:

| 30 Minutes | | Save |

Contact Set:

| Common Contact Set | | Save |

Show Contact Set in Home Page

Show Empty Fields:

| No | | Save |

ShowExpression Fields:

| Yes | | Save |

Font Size:

| 100% | | Save |

Display Density:

| Default | | Save |

List Page Size:

Use the following links to access more detailed information on each set of preferences listed:

📄 [Personal Information](#)

📄 [Regional Settings](#)

📄 [Calendar Options](#)

📄 [Contact Options](#)

📄 [E-mail Setup](#)

📄 [Side Menu Options](#)

📄 [Setup One Click Login](#)
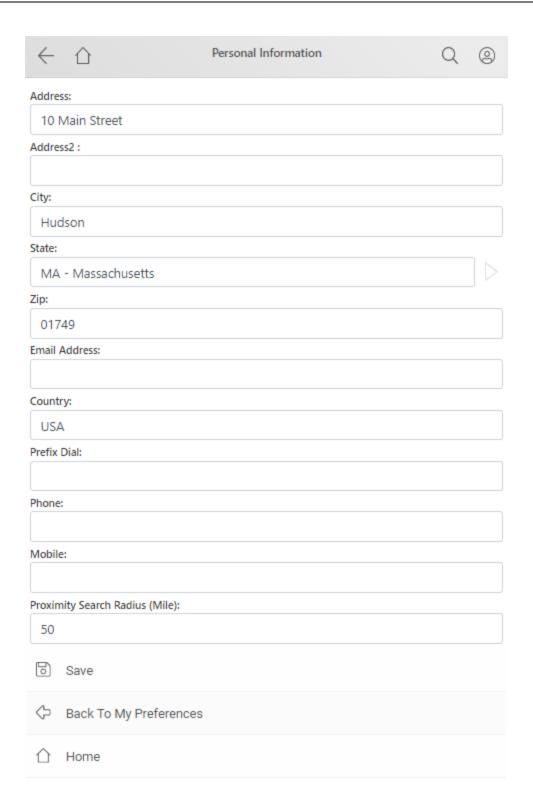
📄 [Contact Set](#)

5.4.27.1 Personal Information

The **Personal Information** settings are used in document and email templates.

If your phone requires a dialing prefix, set it here in the **Prefix Dial** field.

After editing the settings on this page, tap **Save** to preserve them.

Use the following links to access information on each of the other My Preferences topics:
📄 Regional Settings
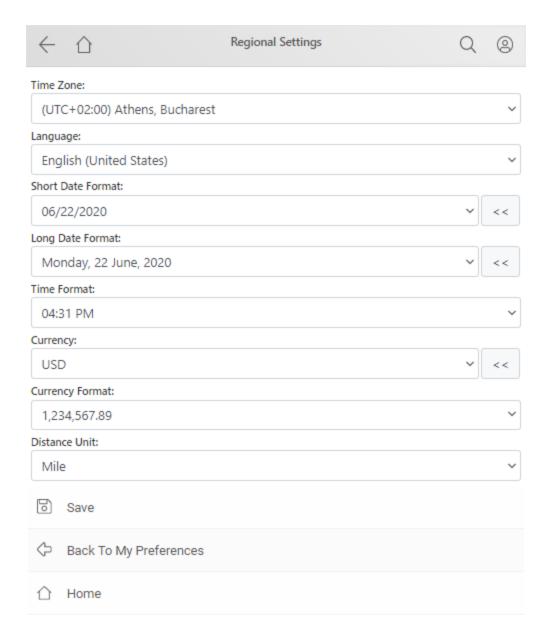
📄 [Calendar Options](#)

📄 [Contact Options](#)

📄 [E-mail Setup](#)

📄 [Side Menu Options](#)

📄 [Setup One Click Login](#)

📄 [Contact Set](#)

5.4.27.2 Regional Settings

The **Regional Setti**ngs include your time zone as well as formatting options for date, time, currency, and distance unit. These settings are used to determine the way data will appear in wMobile. The example shown here is typical for a user in the United States.

There are different **Short Date Format** and **Long Date Format** settings, and choices for **Time Format**, **Currency Type**, **Currency** and **Distance Unit**.

After editing the settings on this page, tap **Save** to preserve them.

Use the following links to access information on each of the other My Preferences topics:

📄 Personal Information
📄 Calendar Options
📄 Contact Options
📄 E-mail Setup
📄 Side Menu Options
📄 Setup One Click Login
📄 Contact Set

5.4.27.3   Calendar Options

The **Calendar Options** page is where a user sets their personal preferences for how the calendar will display.

Today BackColor, **Scheduled Time BackColor**, **Event BackColor** and **History Activity BackColor**: These are settings that control the colors you see for specific calendar areas. Experiment with these to get the most pleasing and useful combination of colors.

The **Dots Indicator Size** controls the dimensions of the dot, which indicates the types of activities.
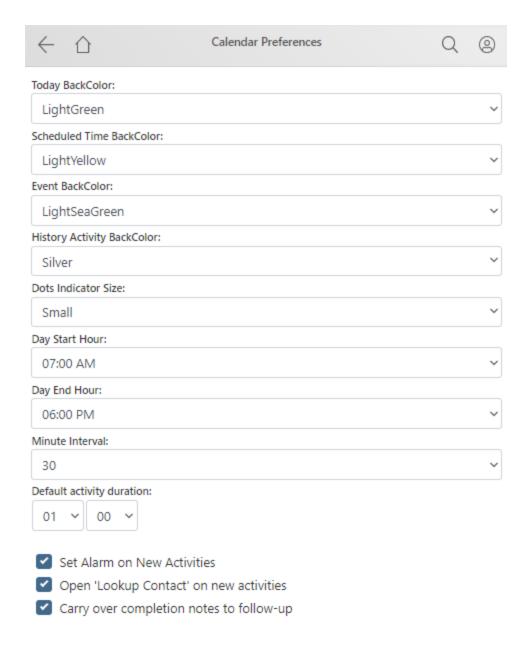
The **Day Start Hour** and **Day End Hour** values are in 24 time format. This determines the span of time displayed on the calendar.

The **Minute Interval** controls the time increments displayed on the **Week** and **Day** pages.

Set Alarm on New Activities enables alarms on new activities by default.

Open 'Lookup Contact' on new activities opens the **'Lookup Contact'** when a new activity is created.

Carry over completion notes to follow-up will carry over activity notes on follow up activities.

Pending Activity Types allows selection of the activity types for "pending" activities that will be displayed on the calendar.

History Activity Types allows selection of the activity types for "history" activities that will be displayed on the calendar.

Show History Activities when checked, will cause wMobile to display history records (i.e., completed activities) on the calendar.

Work Days checkboxes control the days that are viewable and accessible on the **Week** page. If a checkbox for a specific day is not checked, the hyperlinks are not available to take you to that day.

Show on Calendar will display activities on the calendar with the Contact name and/or Company name.

Save: After editing the settings on this page, tap **Save** to preserve them.

Pending Activity Types:

- ☑ 📞 Calls
- ☑ 📍 Appointments
- ☑ 📅 Others
- ☑ 🔄 Next actions
- ☑ 📅 Events

History Activity Types:

- ☑ Show History Activities
  - ☑ 📞 Phone Calls
  - ☑ 🔄 Next actions
  - ☑ 📍 Appointments
  - ☑ 📅 Others
  - ☑ 📅 Events
  - ☑ 📋 To-Dos
  - ☑ ✉ Sent Messages

Work Days:

- ☐ Sunday
- ☑ Monday
- ☑ Tuesday
- ☑ Wednesday
- ☑ Thursday
- ☑ Friday
- ☐ Saturday

Show on Calendar:

- ☑ Contact
- ☐ Company
- ☐ Use a dBase expression

💾 Save

Use the following links to access information on each of the other <u>My Preferences</u> topics:

📄 <u>Personal Information</u>

📄 <u>Regional Settings</u>

📄 <u>Contact Options</u>

📄 <u>E-mail Setup</u>

📄 <u>Side Menu Options</u>

📄 <u>Setup One Click Login</u>

📄 <u>Contact Set</u>

5.4.27.4 Contact Options

Show Additional Contact Drop-down: This option controls how A<u>dditional Contacts</u> will be displayed on the full contact window. The options are **Contact Only**, **Contact title** and **Contact reference**.

Add Contacts to Local Address Book: The options are **Download** or **Email**. If your mobile device browser does not support opening downloaded vCard files, then use the **Email** method. The contact's vCard file will be emailed to your device (see note).

Add Activity to Local Calendar Method: The options are **Download** or **Email**. If your mobile device browser does not support opening iCal, then use the Email method. An activity iCal file will be emailed instead (see note).

> 🖹 **NOTE**: For adding to Add to Local Address Book/Calendar: Android, Windows Phones, and Blackberry devices will work with Download method; iPhone requires the Email method.

Additional Contact : Fax Label: The value entered here will be displayed as the label for the "Fax" field.
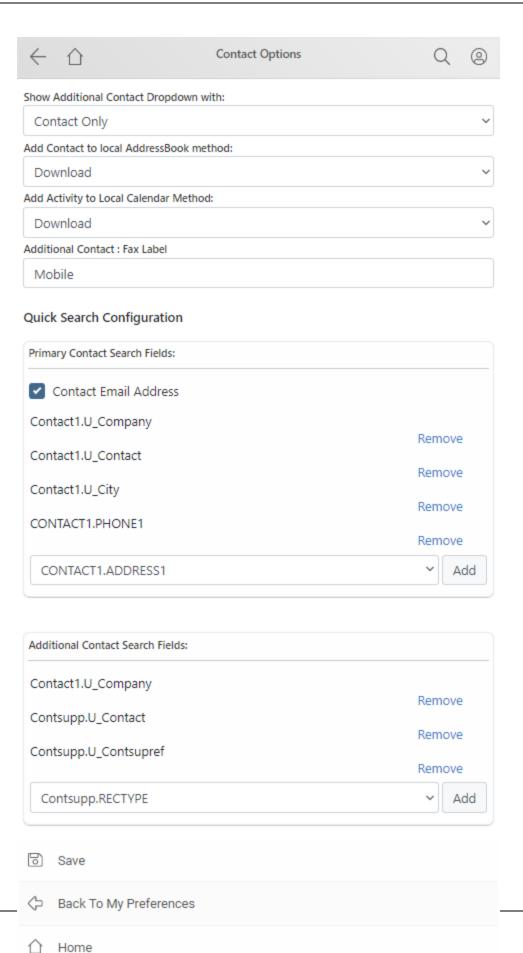
Quick Search Configuration
Use the <u>Quick Search Configuration</u> page to configure the Primary/Additional Quick Contact Search fields used to find your contacts fast.

After editing the settings on this page, tap **Save** to preserve them.

Tap **Back to My Preferences** to make other changes to the user settings.

Home: Returns you to the Home Menu.

Contact Options

Show Additional Contact Dropdown with:

| Contact Only | ⌄ |

Add Contact to local AddressBook method:

| Download | ⌄ |

Add Activity to Local Calendar Method:

| Download | ⌄ |

Additional Contact : Fax Label

| Mobile |

Quick Search Configuration

Primary Contact Search Fields:

☑ Contact Email Address

Contact1.U_Company

                                                    Remove

Contact1.U_Contact

                                                    Remove

Contact1.U_City

                                                    Remove

CONTACT1.PHONE1

                                                    Remove

| CONTACT1.ADDRESS1 | ⌄ | Add

Additional Contact Search Fields:

Contact1.U_Company

                                                    Remove

Contsupp.U_Contact

                                                    Remove

Contsupp.U_Contsupref

                                                    Remove

| Contsupp.RECTYPE | ⌄ | Add

💾 Save

← Back To My Preferences

⌂ Home

Use the following links to access information on each of the other My Preferences topics:

📄 Personal Information

📄 Regional Settings

📄 Calendar Options

📄 E-mail Setup

📄 Side Menu Options

📄 Setup One Click Login

📄 Contact Set

5.4.27.5 E-mail Setup

The **Email Accounts Page** will list any email accounts already configured and will give you the ability to add New Account.

← ⌂   Email Accounts Setup   🔍   ⊚

Accounts:

☐ **User1's (Default)**

                                                          Test   Default

⊕   New Account

🗑   Delete

Email Client:

| Builtin | ⌄ |

Enabled Server Settings:

| Incoming and outgoing | ⌄ |

Users Count in Recipient List:

| 4 | ⌄ |

Default E-mail view:

| Plain Text | ⌄ |

Default 'New' Template:

| (none) | ⌄ |

Default "Reply" Template:

| (none) | ⌄ |

Default "Forward" Template:

| (none) | ⌄ |

☐   Show GoldMine Inbox in Home Page

☐   Show E-mail Center in Home Page

☐   Complete original message on Reply/ReplyToAll

💾   Save

⇐   Back To My Preferences

⌂   Home

- **Accounts**: Email account(s) that have been configured are displayed first. Tapping on an email account's link will open that account's detail page to allow maintenance to be done to that email account such as editing the signature or updating configuration. For details on all the field settings, see Add Email Account.
- **Test**: Use Test to test the email account settings.
- **Default**: Tap this link to set an account as the default account if you have more than one email account. When sending email from within wMobile, the "from" address will be used from the email account chosen as the default if a user has multiple email accounts configured.

   NOTE: All email accounts for a specific user will have email received regardless of this "Default" setting (and if the account(s) are set to receive email).
- **New Account**: Tap this link to open the Add Email Account screen. Enter all of the appropriate information to create an email account. The **Account Name** field will store a "friendly" name for each email account you create and these names will display in the Email Center drop-down to select from (i.e., if you use more than one email account).
- **Delete**: Tick an email account's checkbox and then tap on **Delete** to remove the account.

General Email Settings:
- **Email Client**: The email client selection options are **Builtin** or **External**. This setting controls wMobile's behavior when you tap on an email address hyperlink. Depending on the setting here, the email will be created using wMobile as the email client (**Builtin**) or your device's email client (**External**).
- **Enabled Server Settings**: Selections include **Incoming Only**, **Outgoing only**, **Incoming and outgoing**. Most customers select Incoming and outgoing (the default value), which will enable settings for both incoming and outgoing email connections.
- **Users Count in Recipient List**: Select the number of GoldMine users to be displayed by default in the email recipient list when composing email.
- **Default E-mail view**: **Plain Text** or **Full Html**. By default, this is set to **Plain Text** so that email will be displayed quickly (no text formatting). The **Full Html** option can be used to display graphics and special text formatting like **bold**, <u>underline</u>, font colors, font sizes, `different fonts`, etc.
- **Default 'New' Template**: Select an email template to be used as the default when creating new email messages.
- **Default 'Reply' Template**: Select an email template to be used as the default when replying to email messages.
- **Default 'Forward' Template**: Select an email template to be used as the default when forwarding email messages.

- **Show GoldMine Inbox in Home Page**: Displays the GoldMine Inbox link on the <u>Home Menu</u>.
- **Show E-mail Center in Home Page**: Displays the Email Center link on the <u>Home Menu</u>.
- **Complete original message on Reply/ReplyToAll**: Add the original message when you reply to an email.
- Tap **Save** to preserve any changes.
- **Back to My Preferences**: Returns you to the <u>My Preferences</u> page.
- **Home**: Returns you to the <u>Home Menu</u>.

💡 **TIP**: Using the wMobile Manager Console, an administrator can manage the email accounts used in wMobile without having to log into the wMobile Phone/Desktop editions as a specific users to mange their accounts. Please see the <u>Configuring Email Accounts in wMobile</u> topic for details.
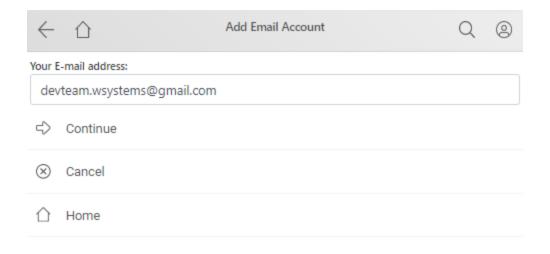
Use the following links to access information on each of the other <u>My Preferences</u> topics:

📄 <u>Personal Information</u>
📄 <u>Regional Settings</u>
📄 <u>Calendar Options</u>
📄 <u>Contact Options</u>
📄 <u>Side Menu Options</u>
📄 <u>Setup One Click Login</u>
📄 <u>Contact Set</u>

5.4.27.5.1 Add Email Account

To setup a new email account:

From the <u>Home</u> page, select user menu (side menu) and then tap on <u>My Preferences</u> > **E-mail Setup > New Account**. This will open the **Add Email Account** page. Enter the email address and tap **Continue**.

NOTE: After tapping **Continue**, on the **Add Email Account** page there will be three tabs used for the account setup: **Basic**, **Advanced**, and **Folders**. Fields with an asterisk (*) are required fields and must be filled in.

Basic Settings

Account Name*: This is a required field. This is the "friendly" name of the email account that will appear in Email Center drop-down and optionally on the main menu.

Reply Address: Your full email address.
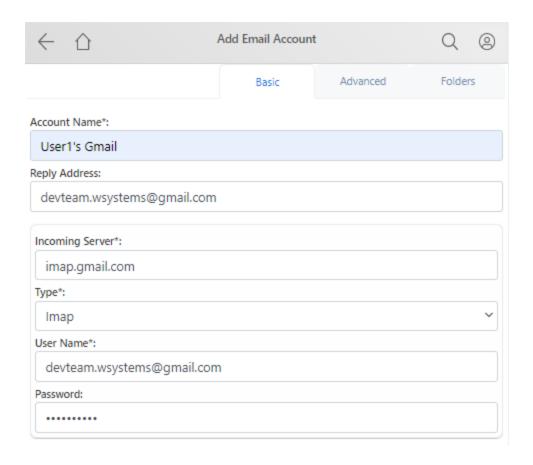
Incoming Server*: The name of the "incoming" email server. Enter your email server name or IP address.

Type*: Select either **POP3** or **IMAP**.

NOTE: Once the account is configured with a specific protocol and the protocol needs to be changes, the accounts must be deleted and recreated in wMobile (simply changing the protocol is not supported).

User Name*: Your email account login name.

Password: Enter your email login password. (NOTE: After an email account has been configured and saved, there will be an **Edit Password** link to allow editing of the password).

Outgoing Server(SMTP)*: The name of the "outgoing" email server. Enter your email server name or IP address.
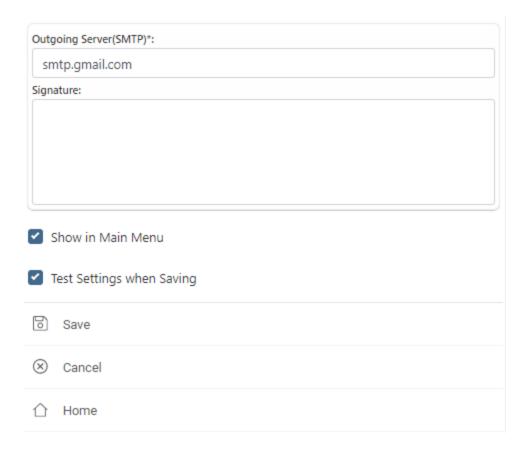
Signature: Attaches a signature (information about you, your organization, telephone number, etc.) to each message sent.

☑ **Show in Main Menu**: When checked, this email account will be displayed on the <u>Home</u> menu.

☑ **Test settings when saving**: When checked, an email message will be sent to your email address as a test.

Save: This will "save" any changes made to the email account that is currently being accessed.

Cancel: This will take you back to the <u>Email Accounts Page</u> without saving any changes.

Home: Returns you to the Home menu.

Advanced Settings

Reply Name: This is the sender's full email address.

Incoming Server Port*: Specifies the port address to be used for incoming email.

☑ **Use encrypted connection (TLS/SSL)**: Check this if your email server requires encryption for incoming email.

Authentication: Select the authentication method required by your mail server. The methods currently supported are:
- Auto, Regular, Ntlm, Cram-Md5, and Kerberos.

Check Interval(Min) >=30: This setting is the frequency that will be used to check for new email messages. Enter a value using 30 minutes increments such as 30 minutes or more.

Outgoing Server Port*: Specifies the port address to be used for outgoing email.

☑ **Use encrypted connection (TLS/SSL)**: Check this if your email server requires encryption for outgoing email.

Authentication: Select the authentication method required by your mail server. The methods currently supported are:

- None, Auto, Login, Plain, Ntlm, Cram-Md5, and Kerberos.

User Name: Specifies the user account name used to access your outgoing mail server.
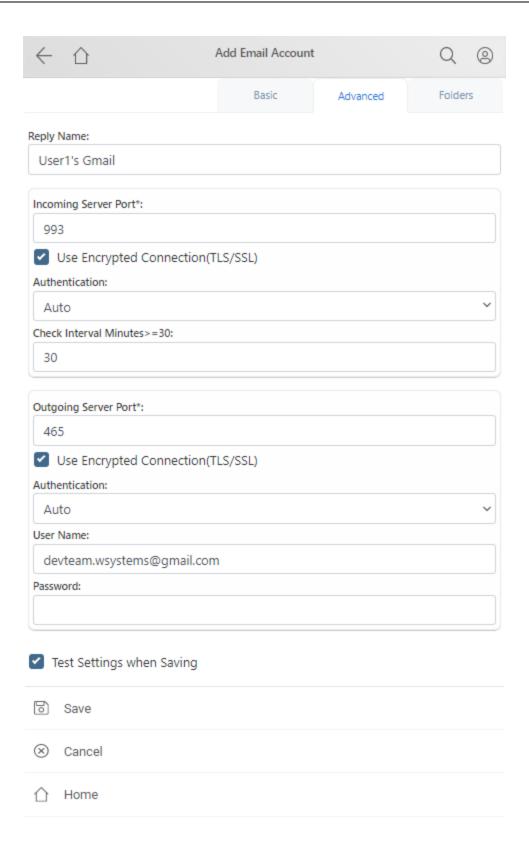
Password: Specifies the password used to access your outgoing mail server. (NOTE: After an email account has been configured and saved, there will be an Edit Password link to allow editing of the password).

☑ **Test settings when saving**: When checked, an email message will be sent to your email address as a test.

Save: This will save any changes made to the email account that is currently being accessed.

Cancel: This will return you to the **Email Accounts Page** without saving any changes.

Home: Returns you to the [Home Menu](#).
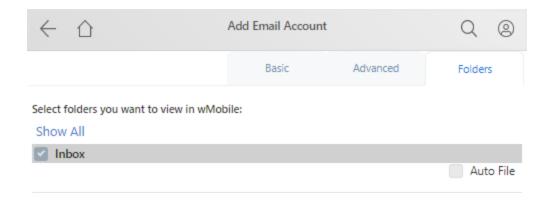
Folders Settings

The email fetcher service can **Auto File** emails sent from another email system such as Outlook or Gmail. This feature is particularly useful for Outlook users that do not process their email in GoldMine.

Inbox: The wMobile email process downloads emails in the background for each account. If the email address of the sender is linked to a contact record in GoldMine, the email is linked and filed automatically. The email will appear in the Inbox with annotations as "Linked" and "Filed".

Show All: Displays all folders available for auto-filing.
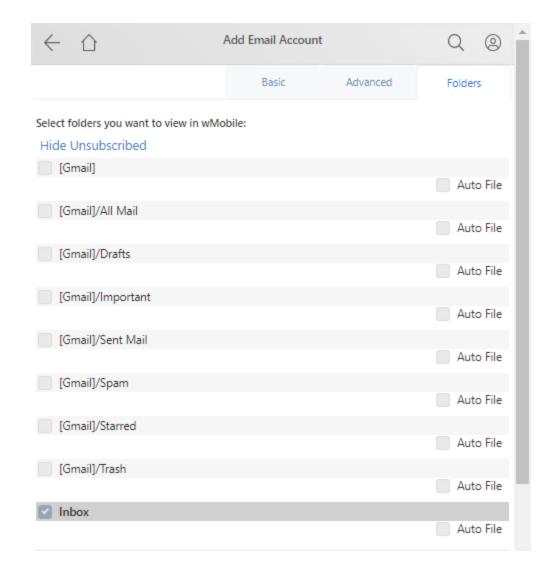
Configure Sent Folder: See below for details.
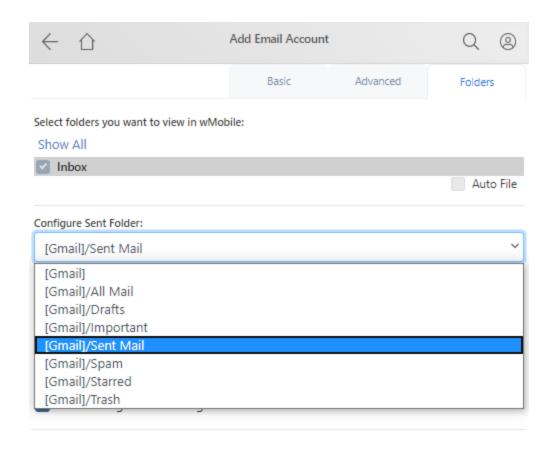
☑ **Auto File**: When checked, will automatically link and file emails in this folder based on a matching email address.

NOTE: For **Auto File** to function, "**Disable Auto Checking**" must NOT be enabled.

After tapping on "**Show All**", place a check mark in the **Auto File** checkbox for the specific folder(s) you would like to have auto-filing enabled for.

Configure Sent Folder: Select the mail folder that contains your Sent mail from the list of folders in the drop-down. Typically the folder selection is set to link emails in the Outlook Sent Items folder.

☑ **Disable Auto Checking**: This option will stop the Email Fetcher service from automatically checking for new mail on this email account. Any **Auto File** folders selected for automatic filing will not be honored when **Auto Checking** is disabled.

☑ **Delete from Server when Processed**: With this option checked, wMobile will delete email from the server when it is processed. If email is deleted from the server using another email client (e.g., GoldMine) wMobile will remove it from your wMobile Account Inbox. If email is deleted from wMobile it will be deleted from server as well.
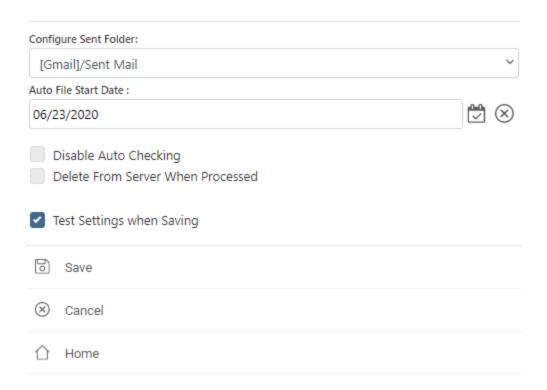
Auto File Start Date: Set the start date for auto-filing email messages based on your auto-file settings.

☑ **Test settings when s**aving: When checked, an email message will be sent to your email address as a test.

Save: This will save any changes made to the email account that is currently being accessed.

Cancel: This will return you to the **Email Accounts Page** without saving any changes.

Home: Returns you to the [Home Menu](#).

Configure Sent Folder:

[Gmail]/Sent Mail ⌄

Auto File Start Date :

06/23/2020   📅 ⊗

☐ Disable Auto Checking
☐ Delete From Server When Processed

☑ Test Settings when Saving

💾 Save

⊗ Cancel

⌂ Home
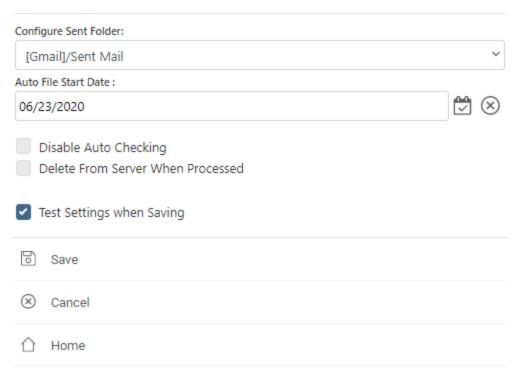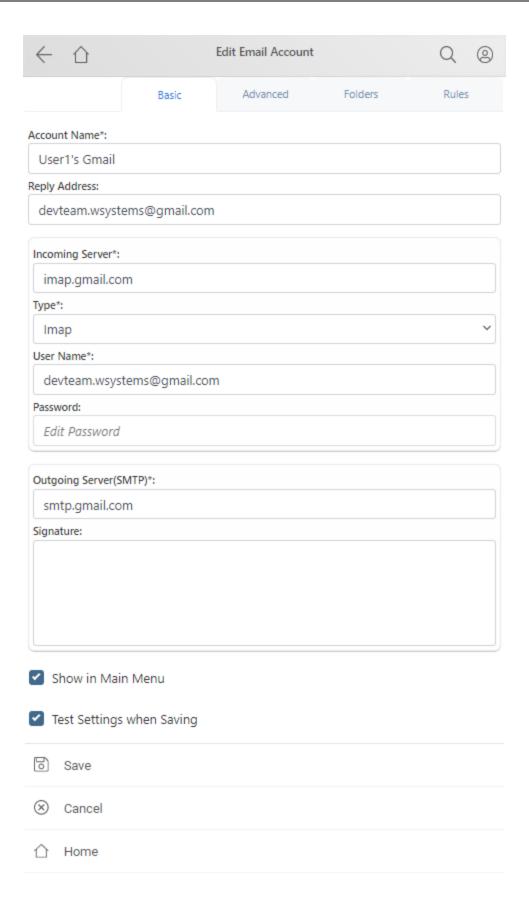
If you had **Test settings when saving** ticked when saving the email account, and the account creation was successful, you will get a message stating wMobile sent you a message and to check your Inbox for it.

Configure Sent Folder:

[Gmail]/Sent Mail

Auto File Start Date :

06/23/2020

☐ Disable Auto Checking
☐ Delete From Server When Processed

☑ Test Settings when Saving

💾 Save

⊗ Cancel

⌂ Home
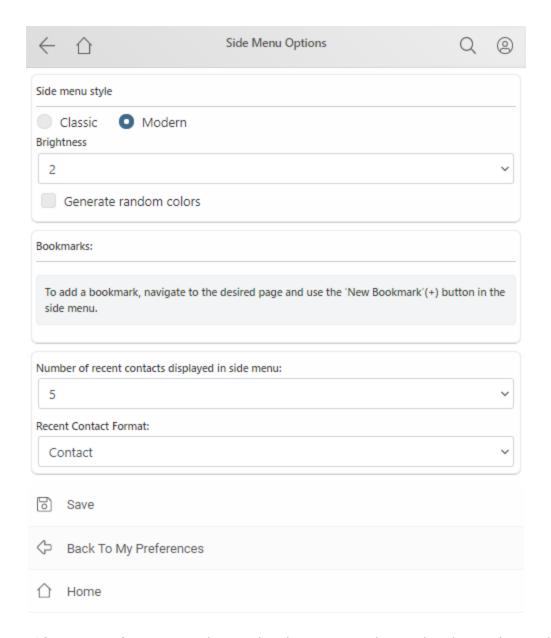
5.4.27.5.2 Edit Email Account

When an existing email account needs to be edited or deleted, select My Preferences from the user menu (side menu) on the Home page and then select **E-mail Setup**. Tap the appropriate link for the **E-mail Account** to be edited and a screen similar to the following example will display containing a view of the current settings for that email account. For details on each field, see Add Email Account. There are three tabs of information for email settings. Be sure to fill in all necessary configuration details.
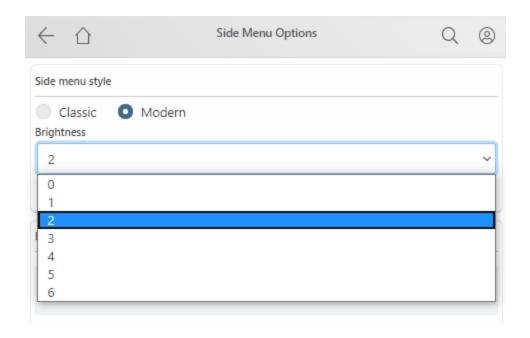
5.4.27.6 Side Menu Options
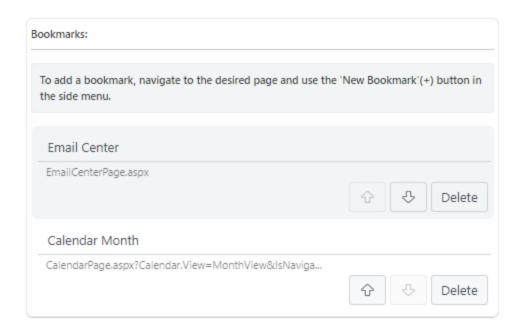
Side Menu Options includes the menu style, Bookmarks and the contacts list displayed in user side menu.

Side menu style: You can choose the classic or modern style. The modern style includes predefined colors to each category. You can change the brightness and generate random colors.
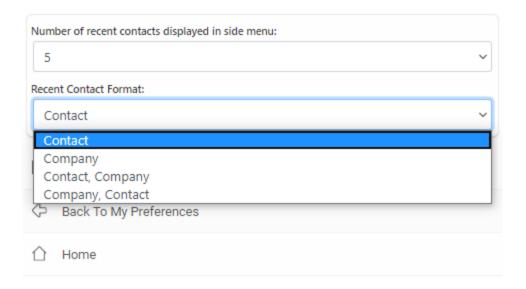
Bookmarks: You can change the order of bookmarks or you can delete them.

Recent Contacts (**Number of recent contacts displayed in side menu**):
The list of recent contacts displayed in user side menu can be configured to show from 0 to 10 contacts. The contacts format can also be edited.
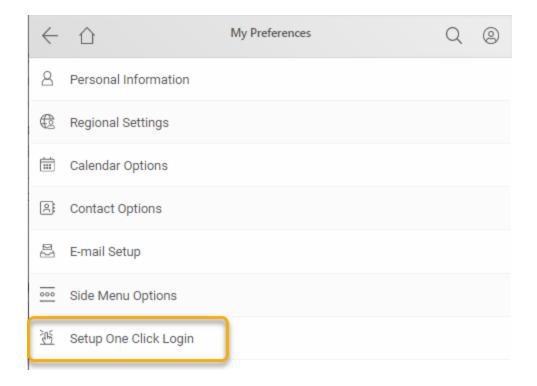
Use the following links to access information on each of the other My Preferences topics:

📄 Personal Information

📄 Regional Settings

📄 Calendar Options

📄 Contact Options

📄 E-mail Setup

📄 Setup One Click Login

📄 Contact Set

5.4.27.7 Setup One Click Login

The One Click Login is an encrypted web address (URL) that contains your organization's wMobile server address combined with the user's username and password in encrypted form. If your administrator has enabled this feature, wMobile will allow you to copy this URL and save it as your wMobile "Favorite" or "Bookmark" shortcut for easy access logging into wMobile without having to type your user name and password each time you log in.

To generate the web address tap on **Setup One Click Login**.

You will see the address in the web address line of the browser you are using. Save this as a Favorite/Bookmark shortcut using the appropriate method for your device and browser.
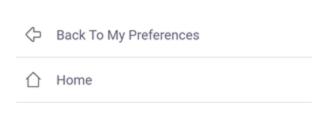
> 📄 **NOTE**: If your GoldMine username or password are changed, the One Click Login will no longer work. The One Click Login address would need to be generated and saved again so that the new username/password combination would be encrypted into the web address.

Saving the One Click Login on an iPhone
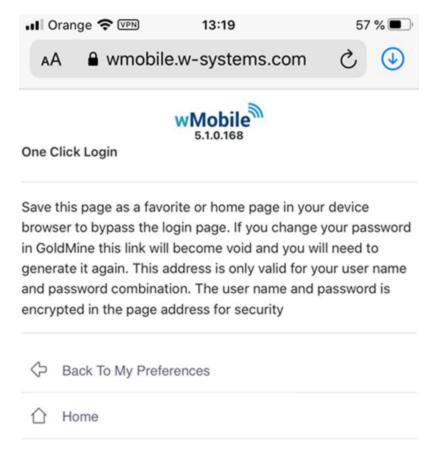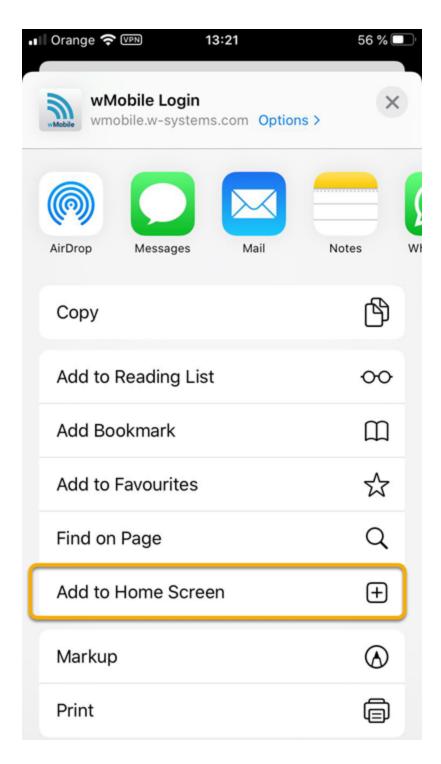
See below for info on Android.

Tap the Share button as highlighted below.

Select **Add to Home Screen** to add the shortcut to the iPhone home screen (or **Add Bookmark** to add as a Safari browser bookmark.
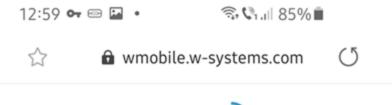
The resulting icon will be placed on the Home Screen.

Saving a One Click Login on an Android
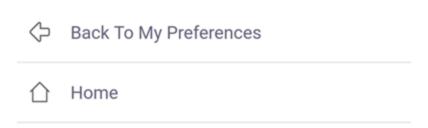
On an **Android** (using Samsung default browser) using the default browser, tap on the browser menu icon as highlighted in orange below.
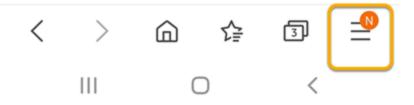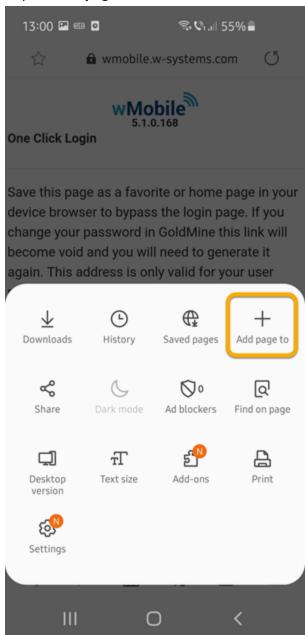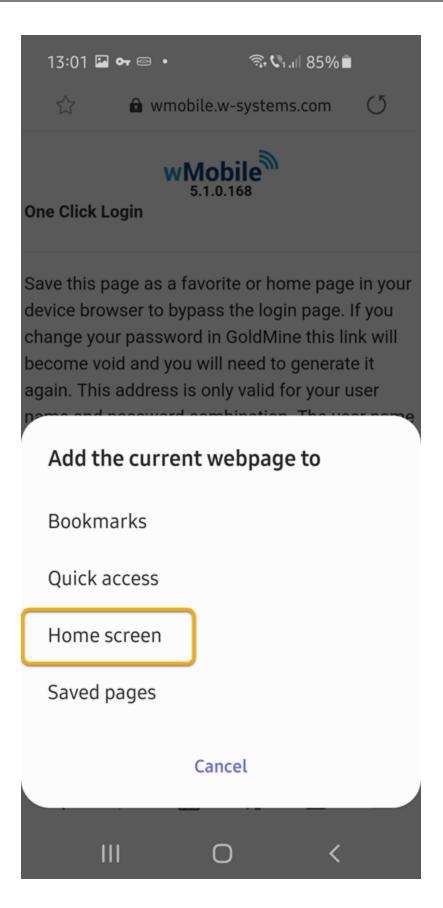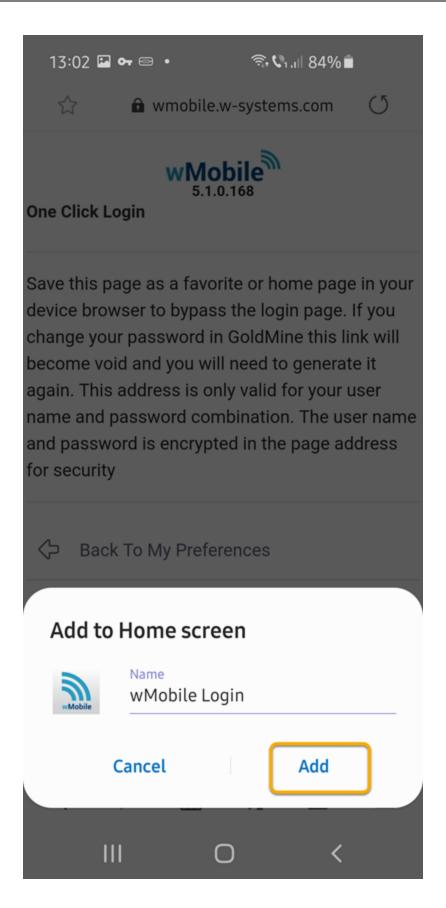
Tap on **Add page to.**

Then select **Add to Home screen**.

Select a name for the shortcut and then tap **ADD**.

In the end you should be able to see the icon on your cell phone's home screen.

Use the following links to access information on each of the other My Preferences topics:

📄 Personal Information
📄 Regional Settings
📄 Calendar Options
📄 Contact Options
📄 E-mail Setup
📄 Side Menu Options
📄 Contact Set
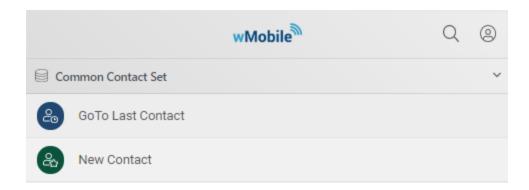
5.4.27.8 Contact Set

Setting the Current Contact Set

wMobile supports multiple Contact Sets.
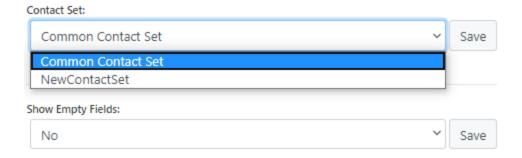
The Contact Set can be displayed in <u>Home page</u> if you tap on **'Show Contact Set in Home Page'.**

To use a different Contact Set, choose from the drop-down list which contains the list of available Contact Sets.
Select the appropriate Contact Set from the drop-down list and tap the Save button. The selected Contact Set will become the current Contact Set and will be saved as the default for future wMobile sessions until it is changed again.

Use the following links to access information on each of the other <u>My Preferences</u> topics:
- <u>Personal Information</u>
- <u>Regional Settings</u>
- <u>Calendar Options</u>
- <u>Contact Options</u>
- <u>E-mail Setup</u>
- <u>Side Menu Options</u>
- <u>Setup One Click Login</u>

5.4.28 Logout

To manually log out of a wMobile session, tap the **Logout** link available from the user menu (side menu) on the <u>Home Menu</u>. If you forget to log out of wMobile, the wMobile
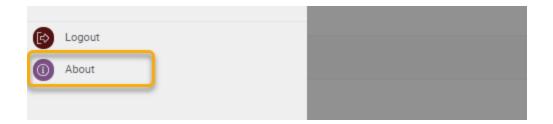
system (on the server) itself will automatically log you out of your session after a set number of minutes. When and if this occurs and you attempt to work in wMobile, you will be returned to the login page and must re-enter your login information.

5.4.29 About

The **About** page displays information for the wMobile system including but not limited to the version and build of wMobile currently running, license information and copyright information.
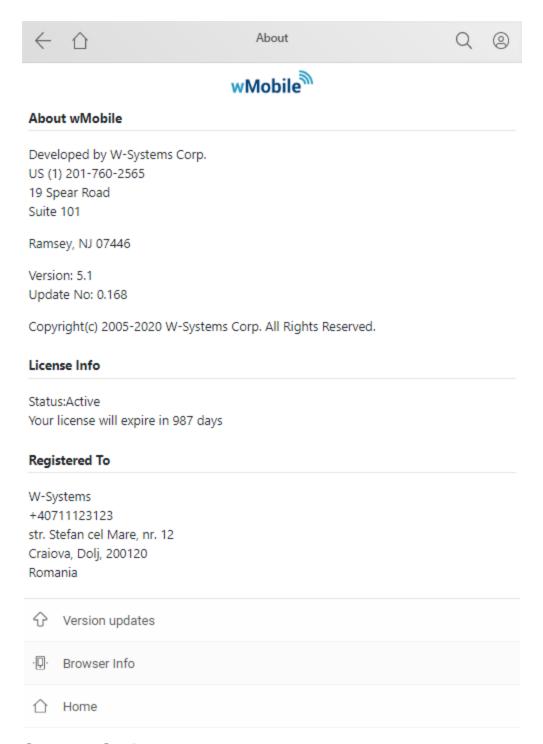
To access this information, tap the **About** link available from the user menu (side menu) on the Home Menu.

On the **About** page is a **Client Info** link used to display information about the client (mobile device) wMobile is running on.

Here you can also find the **Version updates** info for the update/upgrade information.
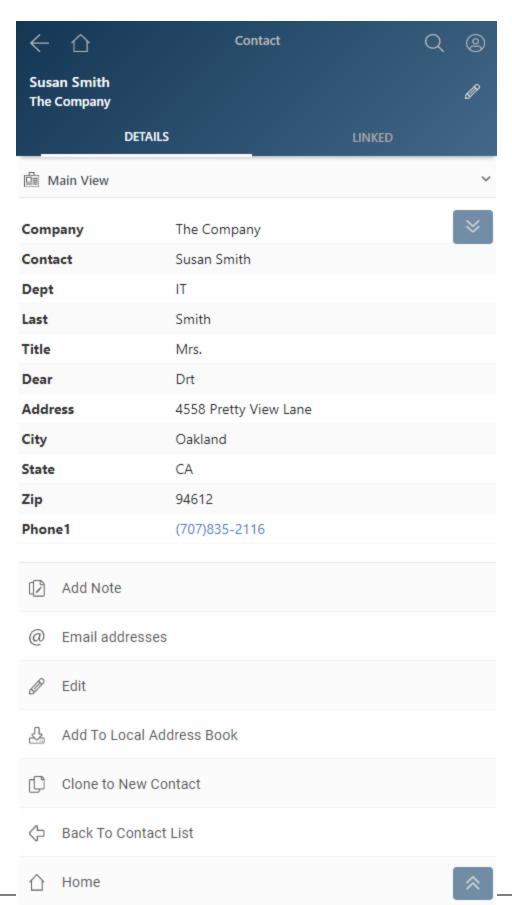
The information available on these screens will be primarily used for administrative and troubleshooting purposes.

5.5   Contact Options

After locating a specific contact there are a number of options available for you to perform. You may need to schedule an activity, send an email message, review history data, create a history record for an unscheduled call you received, etc. wMobile has many

options for working with the selected contact. Please refer to the <u>View contact information</u> topic for more details.

← ⌂	Contact 🔍 ⊚

Susan Smith
The Company   ✏️

        DETAILS   LINKED

🗂 Main View   ⌄

Company	The Company
Contact	Susan Smith
Dept	IT
Last	Smith
Title	Mrs.
Dear	Drt
Address	4558 Pretty View Lane
City	Oakland
State	CA
Zip	94612
Phone1	(707)835-2116

📝 Add Note

@ Email addresses

✏️ Edit

⤓ Add To Local Address Book

🗐 Clone to New Contact

⇦ Back To Contact List

⌂ Home
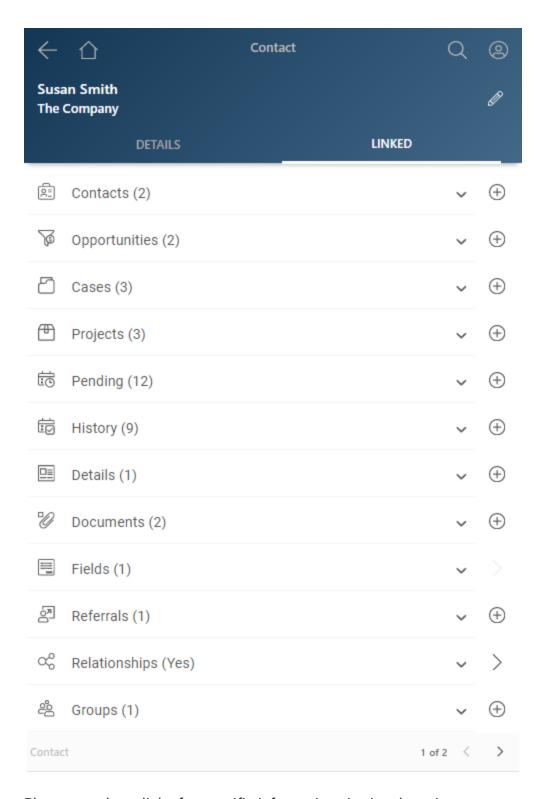
Please use these links for specific information to the hyperlinks available:

📄 [Add Note](#) [This hyperlink may appear as "Add Note" or "View Note (n)" where "n" is the number of existing notes.]

📄 [Email addresses](#)

📄 [Edit (Contact)](#) [The contact also can be edited from the header details, tap on the pencil button]

📄 [Add To Local Address Book](#)

📄 [Clone to New Contact](#)

Back to Contact List: This link will return you to the list of contacts found after a search.

Home: This link returns you to the [Home Menu](#).

You will find information on Contacts, Pending, History and Opportunities, etc. for the selected contact on the **LINKED** tab shown below. Tapping on the down arrow of a specific field will provide a list with the relevant records. For each record which has sub-items, the (x) represents the number of items.

Please use these links for specific information viewing these items:
📄 Contacts [View Additional Contacts]
📄 Opportunities
📄 Cases

📄 [Pending Activities](#)

📄 [History Activities](#)

📄 [Details](#)

📄 [Documents](#)

📄 [Custom Fields Screens](#)

📄 [View Groups](#)

Please use the links for specific information detailing adding these new items:

📄 [Add New Additional Contacts](#)

📄 [Schedule New Pending Activity](#)

📄 [Complete Unscheduled Activity](#)

📄 [Add a New Detail](#)

📄 [Add New Group Membership](#)

📄 [Add a New Opportunity](#)

📄 [Add a New Case](#)
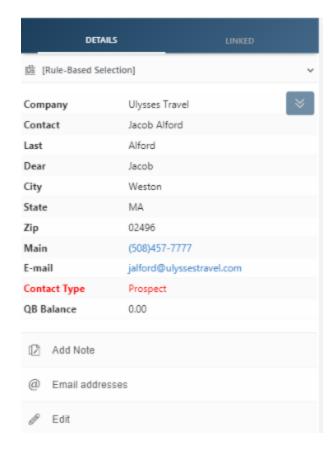
5.5.1   View Contact Information

Once a contact has been selected, you will see a variety of information. wMobile Phone Edition has been designed specifically for use on mobile devices and built so that only fields that contain data will be displayed. This minimizes the need for users to scroll to see specific data. If you prefer to see fields that do not contain data, this can be configured using the wMobile Manager Console by editing the setting: [ShowEmptyFields](#).
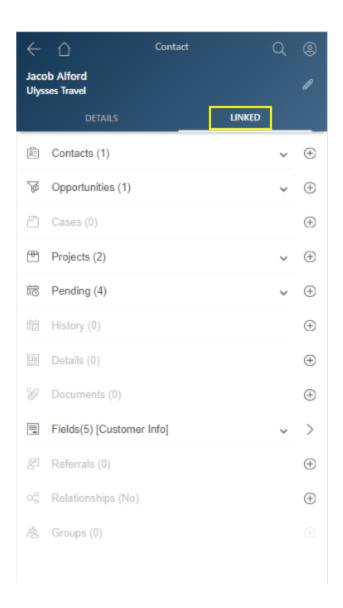
Any piece of information that is underlined and highlighted in blue is a hyperlink. These hyperlinks can be used to instantly make a call to your customer on your mobile phone, bring up an email message, or view the website.

See the topic below to [Edit Contact](#) information.

NOTE: This example shows typical fields but does support displaying non-standard fields. This information can be customized to show information appropriate to your business needs.

Additional information will be displayed on the LINKED Tab. See topics below in the guide for viewing and adding related information.

5.5.2   Edit Contact
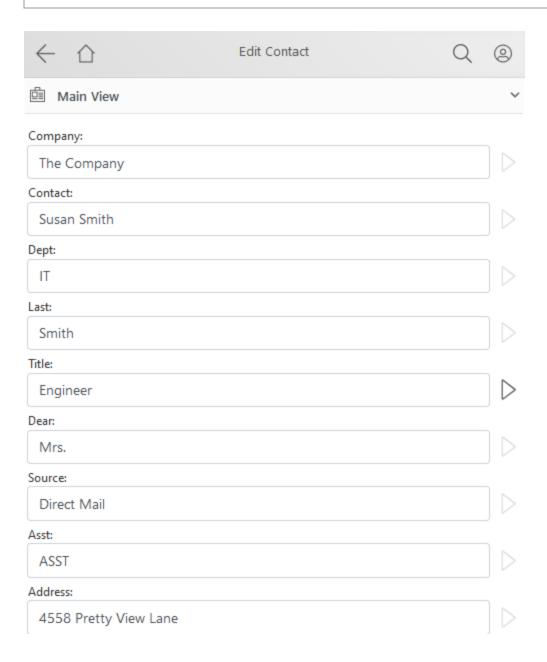
Users have the ability to edit the displayed contact's information using their mobile device.

After opening a contact that needs to be edited, in the View Contact Page are two ways to edit it. First tap on the **Edit** link (shown here) to open the **Edit Contact** page.

From within this **Edit Contact** page you will be able to edit the contact's data. Field names that have an asterisk (*) next to them are "required" fields that you must enter data into while all other field entries are optional. Certain fields have a drop-down list or a text box and will allow you to choose a selection from the drop-down list or type in your own entry within the text box.

> 🗐 **NOTE**: Please refer to the section, General Editing, for details on using drop-down lists and text boxes.

← ⌂   Edit Contact   🔍   ⊚

📇 **Main View**   ⌄

Company:

| The Company | ▷ |

Contact:

| Susan Smith | ▷ |

Dept:

| IT | ▷ |

Last:

| Smith | ▷ |

Title:

| Engineer | ▷ |

Dear:

| Mrs. | ▷ |

Source:

| Direct Mail | ▷ |

Asst:

| ASST | ▷ |

Address:

| 4558 Pretty View Lane | ▷ |

At the bottom of the **Edit Contact** page is a the **Save** link that you will use to save the updates you made while editing the record.

* = Required

🖫	Save
❏	Copy Last Contact (Smith)
⊗	Cancel
⌂	Home
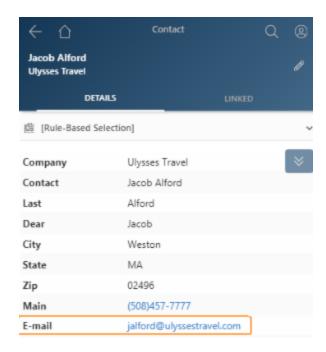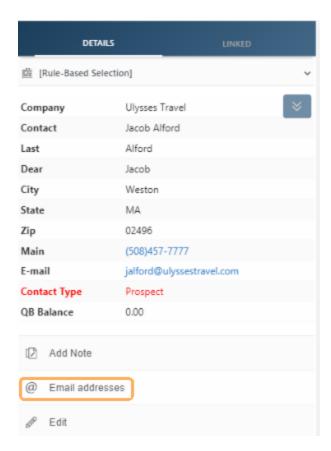
Copy Last Contact (_contact_name_): Using this link will open an **Add Contact** page and pre-populate fields with data from the current contact.
Cancel: Returns you to the Contact Detail page without saving any changes made.
Home: Returns you to the Home Menu.

5.5.3   Email addresses
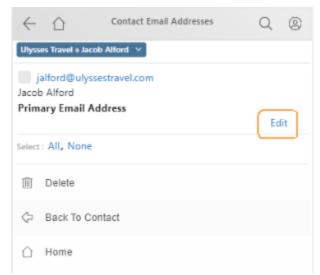
Email addresses can be viewed and updated in wMobile. The primary email will be displayed on the DETAILS tab.
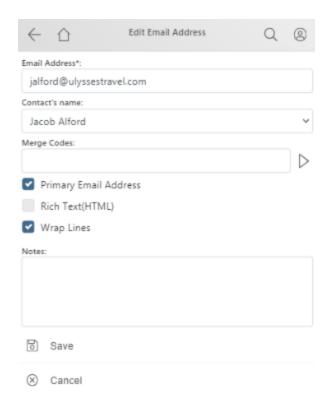
From **DETAIL** tab select **Email addresses** to edit or add new email addresses**.**
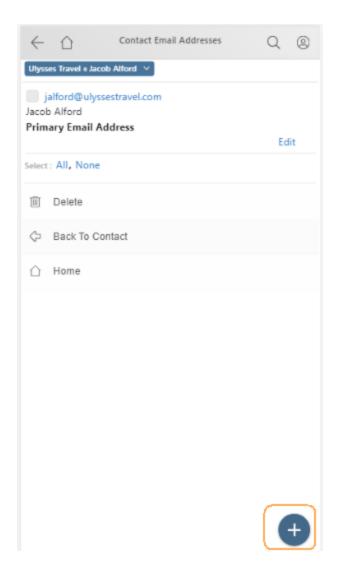
The contact email addresses will be listed. To edit an email address, use the **Edit** option.

Update the address as needed and tap **Save** to preserve changes.
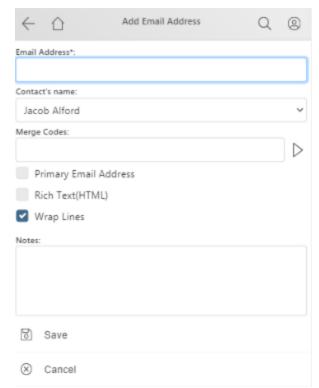
To add another one tap on the " **+** " button.
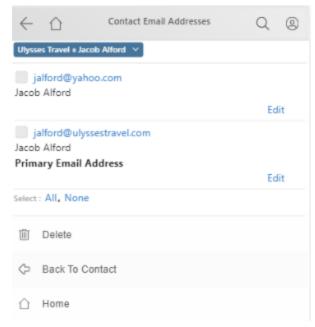
Fill in the new email address for the selected contact. Add Merge Codes if needed. Select whether the new email address should be the primary email address.

It is also possible to change the Contact if there are primary and secondary contacts on the record.

On the bottom of the page are commands to **Save** or **Cancel.**

After saving the new email address, it will be displayed in email address list.
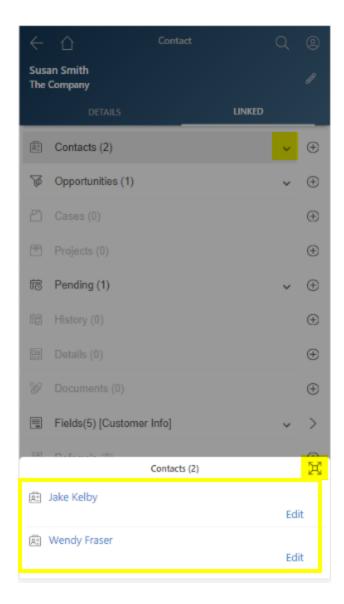
Note: Multiple email addresses can be stored for contacts, but only the one marked as the Primary Email Address will be displayed on the Details tab.

5.5.4   Additional Contacts
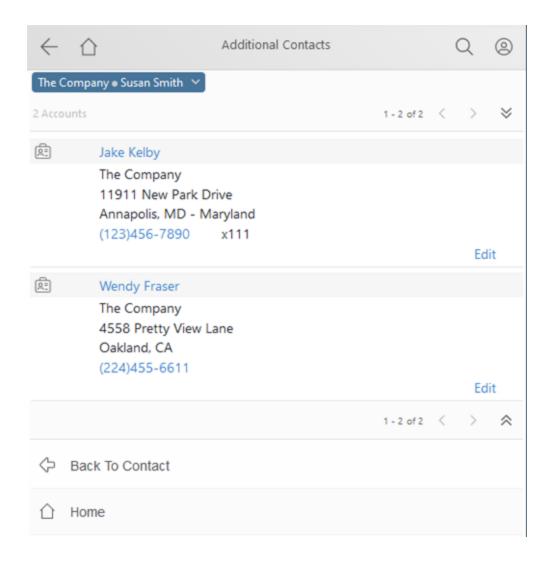
Additional contacts can exist as secondary contacts and are associated with a primary
contact. An example of this would be having a primary contact record for a company and
the main contact is the owner or president of that company. The additional contacts might
be the individual sales team members (one or many), the receptionist, and the IT
department personnel related to the "primary" contact. You might even use an additional
contact record to store a second physical address for the primary contact (e.g., their home
address or a separate ship to address).

To view an additional contact associated with the main contact, select the **LINKED** tab and
then tap on **Contacts (x)** list. This will display a list of the additional contacts. The number
in parentheses indicates the number of additional Contacts.

From this pop-up you can select a name from the list or tap on the expand button (   ).
This will display the **Additional Contacts** page.

In this example, there are two (2) additional contacts for the primary contact. Select one of the contacts and Additional Contacts (Details) page will be opened.

The **Additional Contact** page will show the selected contact's details. As with the primary contact, the phone number and email address will be hyperlinks so they can be selected to have your mobile device dial your phone or create an email message.

← ⌂   Additional Contacts   🔍   👤

Jake Kelby   1 of 2   ‹   ›   ⌄

The Company
Susan Smith

Contact	Jake Kelby
Title	Engineer
Reference	SouthEast
Dear	Jake
Phone1	(123)456-7890 x111
Address	11911 New Park Drive
	Annapolis
	MD - Maryland
	21401
E-mail	JakeKelby@TheCompany.com

📅   Pending (2)   ⌄   ⊕

📅   History (3)   ⌄   ⊕

✏️   Edit

👥   Swap With Primary Contact

👥   Go to Contact

⬇️   Add To Local Address Book

⬅️   Back To Contact List

Below the contact information, there are several command hyperlinks:

Edit: This link will take you to a page for editing the additional contact data.

Swap With Primary Contact: This will swap the selected additional contact with the primary contact record making the primary contact become an additional contact and vice versa.
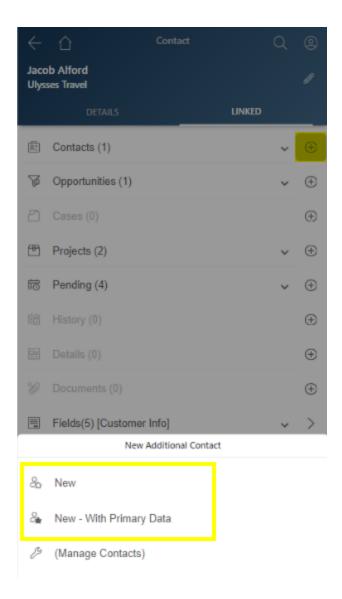
Go To Contact: Opens the detail page to display the primary contact.

Back to Contact: This link will return you to the Contact Detail page (and allow user to move between records found in contact search).
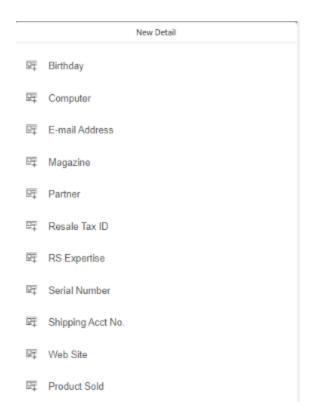
Add To Local Address Book: Adds this contact's data to your device's local address book. Depending on your device you may be asked to confirm the addition. The **Add To Local Address Book** can be restricted by the wMobile administrator.

To add an additional Contact, use the **+** button. Then select **New** to add a new (blank) contact, or select **New - With Primary Data** to add a new contact with the same primary address data.
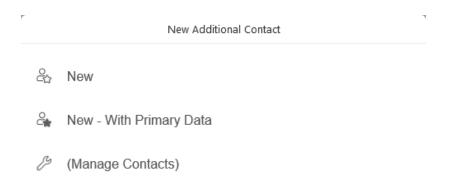
5.5.4.1   Add New Contact (Additional)

To add a new additional contact, or view existing additional contacts, select the **LINKED** tab and then tap on **Contacts (x)** list or on "**+**" button to add a new contact.

New Detail

Birthday

Computer

E-mail Address

Magazine

Partner

Resale Tax ID

RS Expertise

Serial Number

Shipping Acct No.

Web Site

Product Sold
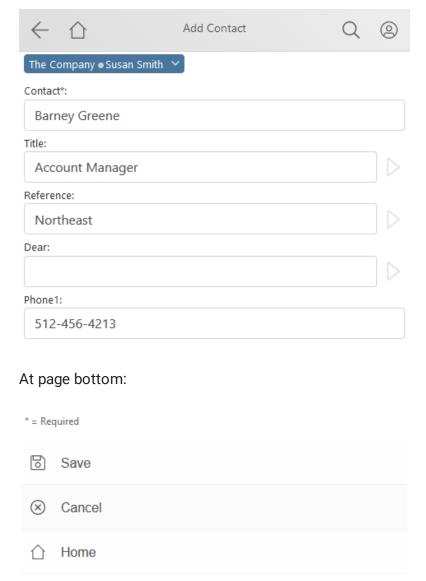
The selections available for adding a new additional contact are :

- **(New)**: Use to create a new additional contact starting with all fields blank.
- **(New - With Primary Data)**: Using this will cause wMobile to pull in address data from the primary contact to be used for the additional contact being created.
- **(Manage Contacts)**: Selecting this option will open a page listing all of the additional contacts associated with the primary contact.

New Additional Contact

New

New - With Primary Data

(Manage Contacts)

Enter the additional contact information. Any field that has a lookup list in GoldMine will have the same lookup list in wMobile.

> 📓 **NOTE**: When entering data, please note the field(s) with an asterisk (*) as they are required and must be filled in.

At page bottom:
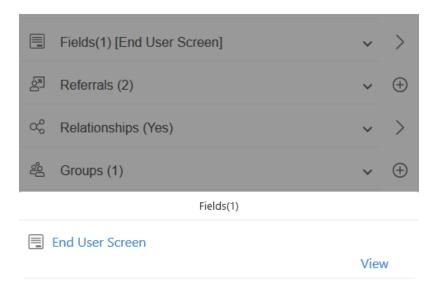
After all the data has been entered, tap **Save** to preserver the information entered.

Tap **Cancel** if you don't want to save this information. Tap **Home** to return to the [Home Menu](#).
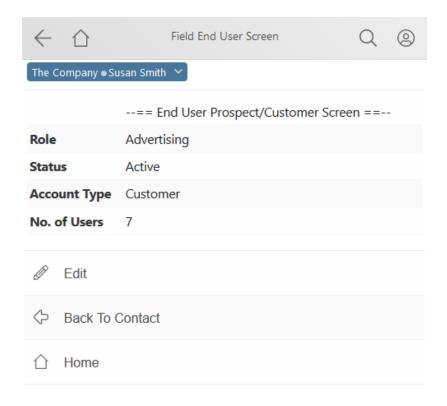
5.5.5   Custom Field Pages

wMobile supports custom field views used to display user-defined fields. This gives you the potential for greater flexibility and the ability to meet more demanding needs of what information is available while using your mobile device.

The **Fields** list displays all of the custom field screens for wMobile. Select the Fields section and then tap on the name of the screen or tap on the "View" button to view any screen. In this example, there is one (1) field screen available.
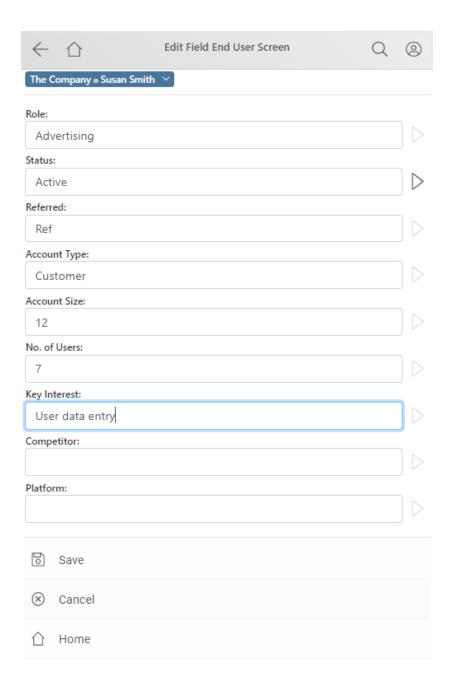
This is a view of the custom detail page displaying the detailed information. Tap the **Edit** link if you wish to modify the data. If the **Edit** link does not appear, this means the custom field page was configured for read-only access to the data.

In edit mode, all available fields will be be displayed for update, including empty fields. Selecting the arrow button [>] button changes the screen by adding changing the field type to a text box (allowing free typing) or a drop-down (for selection from a lookup list). Some fields allow both, based on the field configuration in GoldMine.
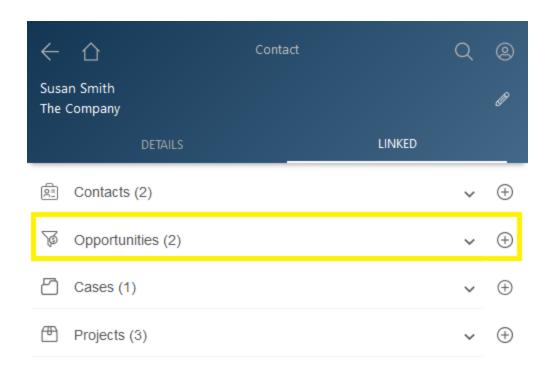
The text box will allow you to type in your entry which will override the drop-down value after tapping the **Save** link or vice versa.
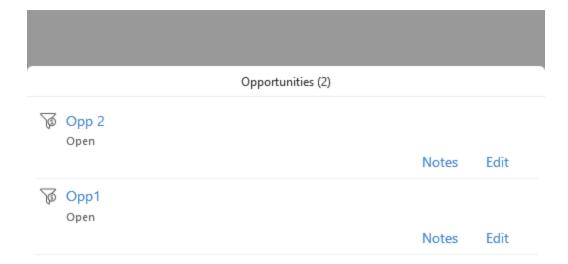
5.5.6   View Opportunities

If the contact has associated Opportunities, then the **Opportunities** list will be populated with the contact's opportunities. The number in parentheses indicates the number of opportunities for the contact.
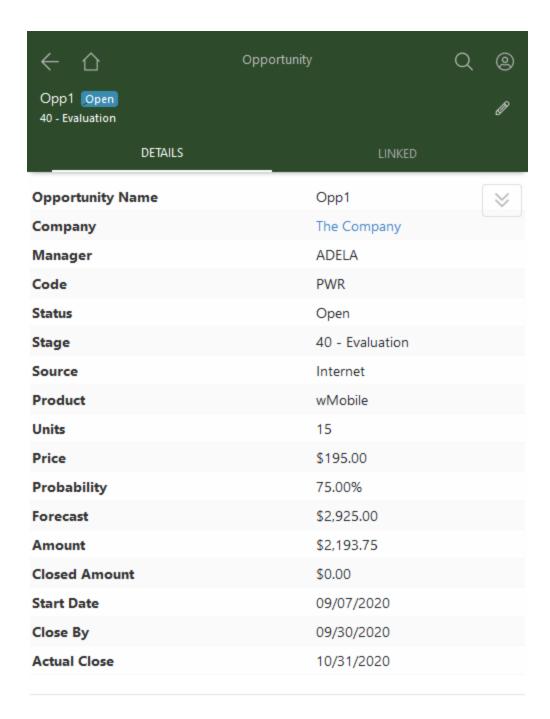
To view the contact's **Opportunities** select the **LINKED** tab and then tap on the **Opportunities (x)** section. The number in parentheses indicates the number of Opportunities for the contact.

From the prompt displayed select a specific opportunity to view its details.
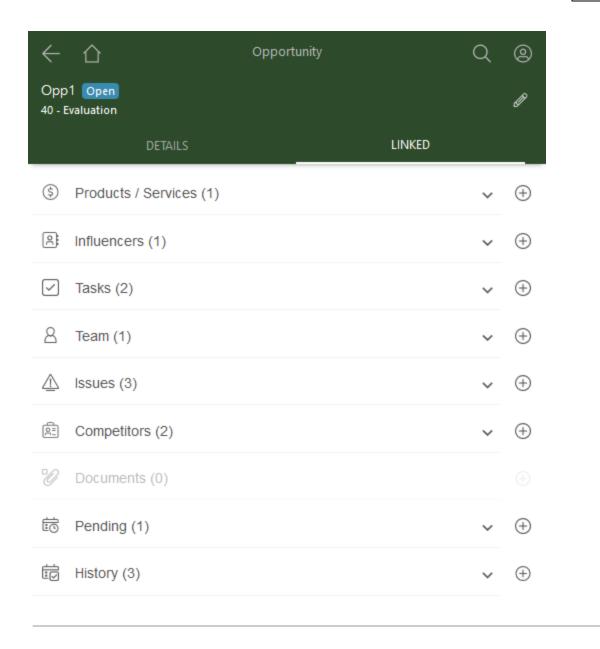
All the details of the opportunity will be displayed. As on the contact screen, if a field does not contain data, it will not be displayed on the opportunity page to minimize scrolling on the mobile device. If you prefer to see fields that do not contain data, this can be configured using the wMobile Manager Console by editing the setting: ShowEmptyFields.

← ⌂	Opportunity 🔍 ⊚

Opp1 `Open`   ✎
40 - Evaluation

DETAILS	LINKED

Opportunity Name	Opp1	⌄
Company	The Company	
Manager	ADELA	
Code	PWR	
Status	Open	
Stage	40 - Evaluation	
Source	Internet	
Product	wMobile	
Units	15	
Price	$195.00	
Probability	75.00%	
Forecast	$2,925.00	
Amount	$2,193.75	
Closed Amount	$0.00	
Start Date	09/07/2020	
Close By	09/30/2020	
Actual Close	10/31/2020	
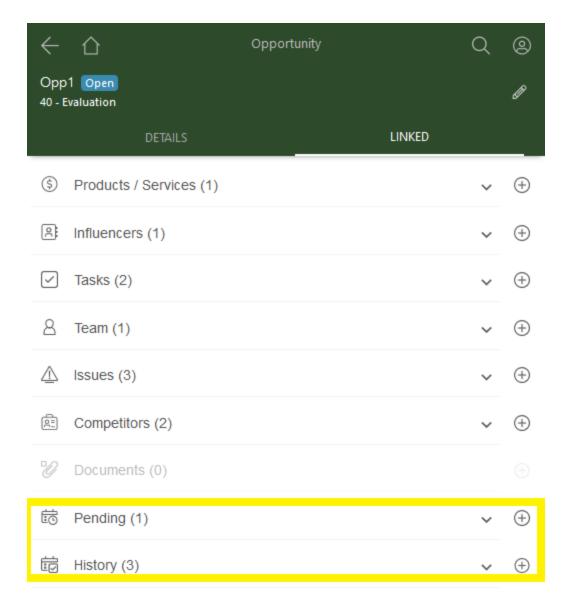
You may view any Products/Services, Influencers, Tasks, Team members, Issues, Competitors, Issues, Documents, Pending or History activities. Select the specific information from **LINKED** tab.
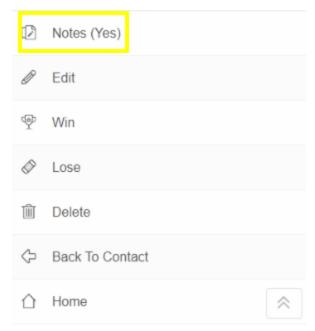
You may also add new opportunity items such as an **Influencer**, **Product/Service**, **Task**, **Team Member**, **Issue**, or Competitor. Tap on the **"+"** button on the item line.
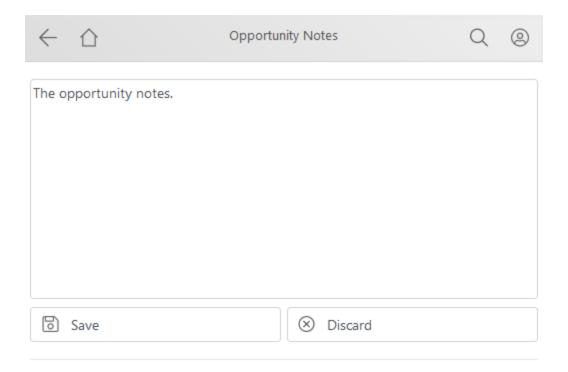
New Pending and **New History** activities can be created here and will be linked to the opportunity.

Notes may be viewed or added by tapping on **Notes** on the DETAILS tab of the Opportunity. If Notes is followed by (No), then there are no existing notes linked to the opportunity. If Notes is followed by (Yes), then there are notes linked to the opportunity.

📄	Notes (Yes)
✏️	Edit
🏆	Win
✒️	Lose
🗑️	Delete
↩	Back To Contact
⌂	Home
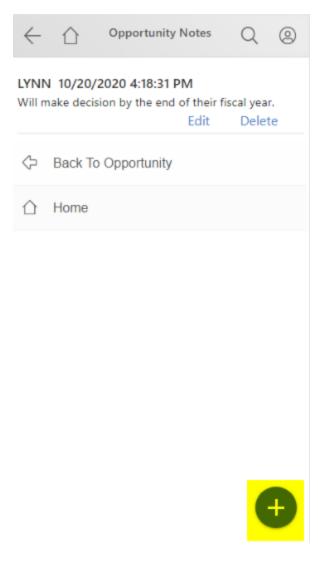
Editing a **Notes ()** link will open the **Opportunity Notes** page:

← ⌂	Opportunity Notes	🔍 👤

The opportunity notes.

💾 Save	⊗ Discard

Tap on **Save** to preserve the note.

To Add a new Note, use the + button.

The user may navigate back to Opportunity or back to the Home Menu by tapping on headers buttons.

In **DETAILS** tab, on the bottom menu you can find additional option for working with the opportunity.

Tap on **Edit** to change opportunity details.
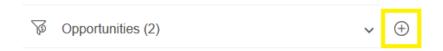
Tap on **Win** or **Lose** to the close the Opportunity.

Tap on **Delete** to remove the Opportunity. This option will depend upon GoldMine permissions.
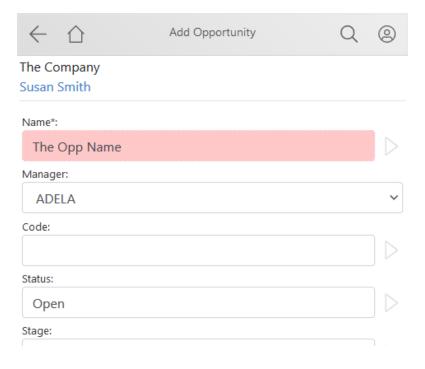
Tap on **Back to Contact** to return to the Contact screen or **Home** to return to the <u>Home</u> menu.

5.5.6.1 New Opportunity Linked To Contact
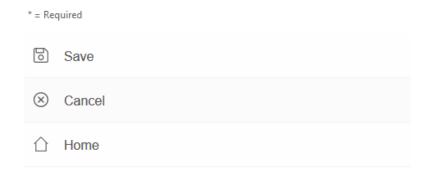
Use the ＂**+**＂ button on the Opportunities section of the **LINKED** tab of the contact to create a new opportunity linked to this contact.

The company and contact will be filled in automatically. Otherwise, the process is the same as adding a new Opportunity from the <u>Home Menu</u>. See the section on <u>New Opportunities</u> for further detail.
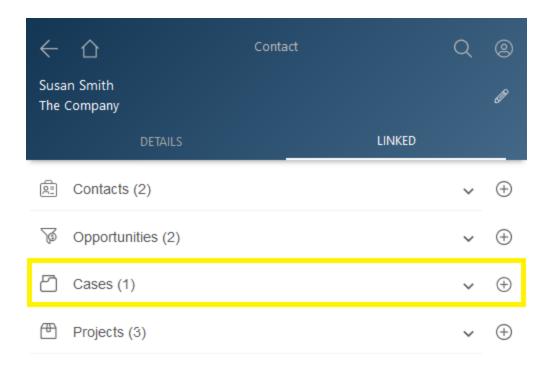
Add opportunity data as needed and tap on **Save**.
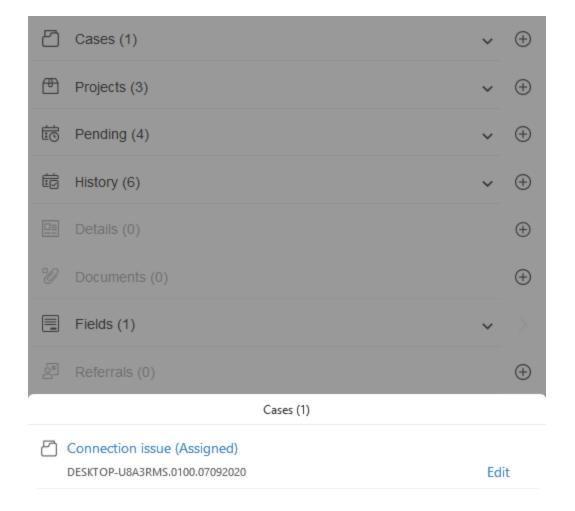
Tap **Cancel** if you do not wish to save the information or tap **Home** to return to the Home Menu.

5.5.7   View Cases
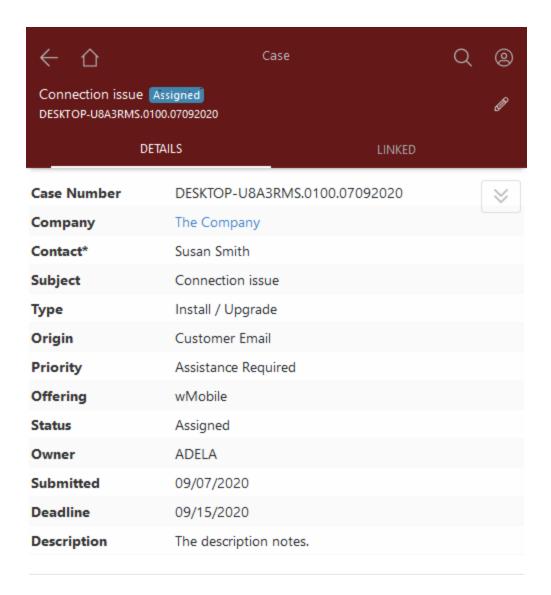
If the contact has associated cases, then the **Cases** list will be populated with the contact's cases. To view the contact's Cases select the **LINKED** tab and then tap on the **Cases** (x) section. The number in parentheses indicates the number of cases linked to the contact.

From the list displayed, select a specific case to view its details.
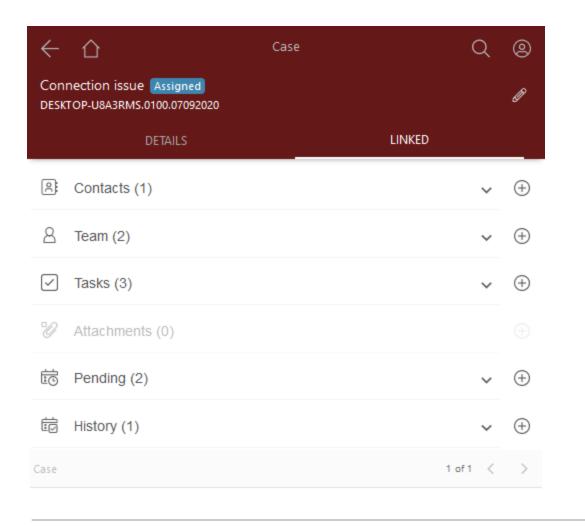
All the details of the case will be displayed. As on the contact screen, if a field does not contain data, it will not be displayed on the case page to minimize scrolling on the mobile device. If you prefer to see fields that do not contain data, this can be configured using the wMobile Manager Console by editing the setting: ShowEmptyFields.
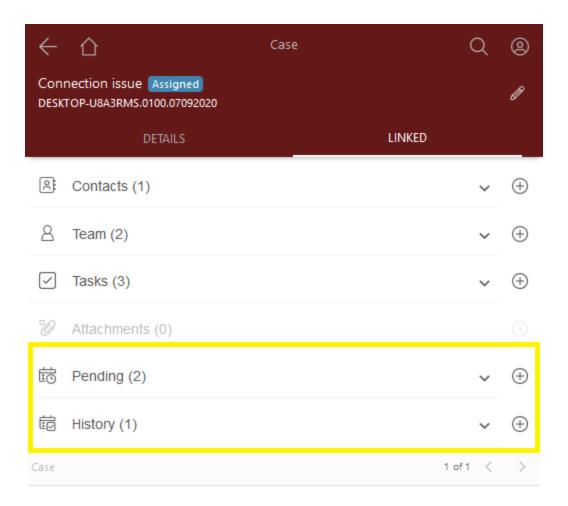
In **LINKED** tab you can view any contacts, team (members), tasks, attachments and pending or history activities.
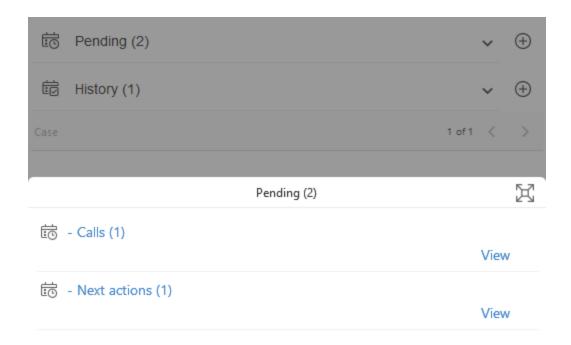
You may also add new case items. Tap on the **"+"** button on the related line.

New Pending and **New History** activities can be created here and will be linked to the case.
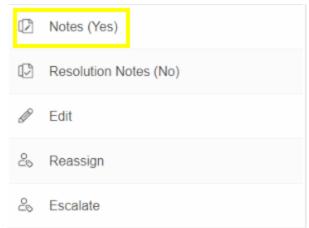
You may view pending or history activities. Select the specific list using the down arrow and the pending or history pop-up list will be displayed.
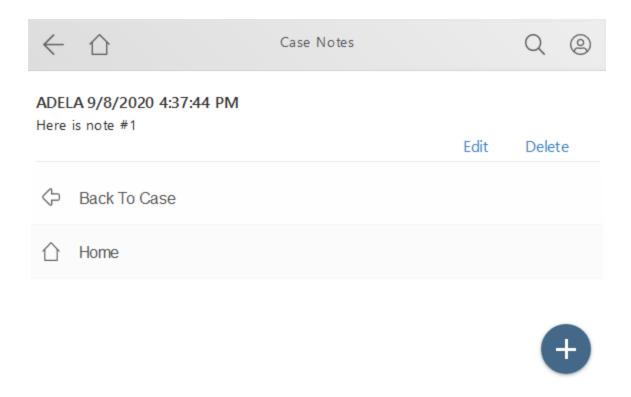
In **DETAILS** tab, the Notes may be viewed or added by tapping on **Notes**.

If Notes is followed by "(No)", this means there are no existing notes linked to the case. If Notes is followed by (Yes), then there are notes linked to the case.

Tapping on the **Notes (Yes)** link will open the **Case Notes** page (shown here with one note).
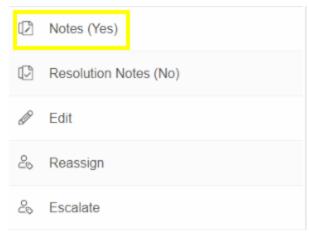
"+" button (Add Note): Add a new note to the case. This page provides a text area to type notes into. On the "Case Notes" page there will be **Save** and **Discard** commands. The note can be edited using the **Edit** link or deleted using the **Delete** link.
Back To Case: Takes user back to the Case details page.
Home: Returns you to the [Home Menu](#).

Back on the DETAILS tab, there are additional options.

Resolution Notes - Select to add case resolution notes.
Edit - use to edit any of the fields on the DETAIL tab of the Case.

Reassign - use to Reassign the case to another user.
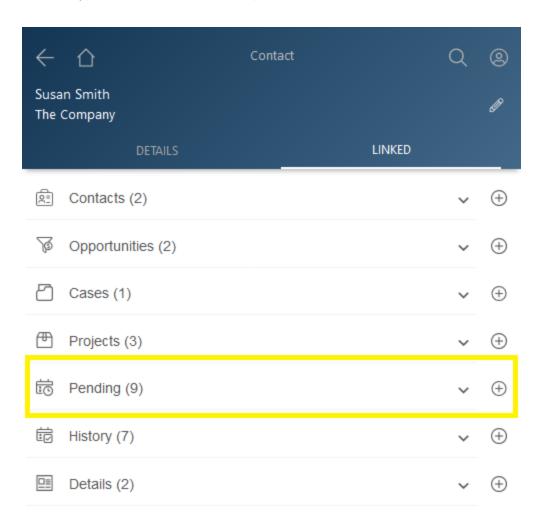
Escalate - use to Escalate to another users.

5.5.8   View Pending
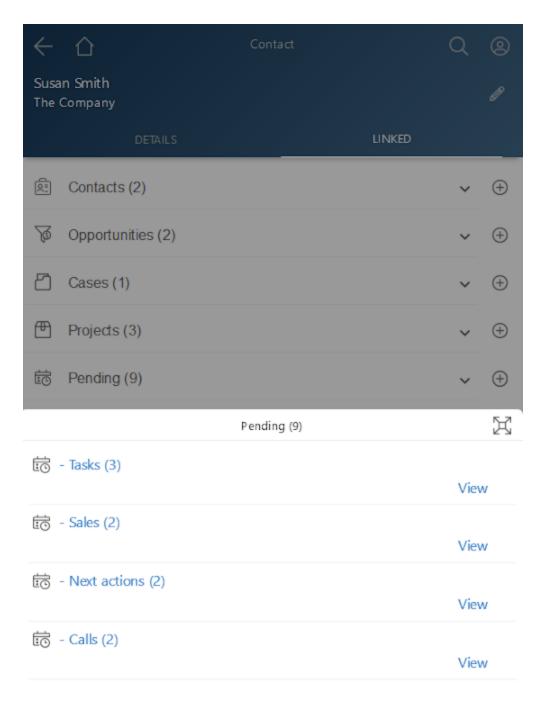
Pending activities are tasks that are scheduled to be done at some time in the future. Once you have selected a contact in wMobile, there is an option to view any or all pending activities for yourself (the default) or another user you will need to select.

Select the **LINKED** tab to see **Pending** activities related to the contact. Tap on the down arrow in the Pending section to expand the list. New activities can also be added by tapping on the " **+** " button on the Pending line.
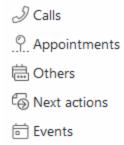
In this example, a list of nine (9) pending activities will be displayed for "All" of the available activity types. To view pending activities tap on the Pending section and a pop-up with all types of activities will be opened.
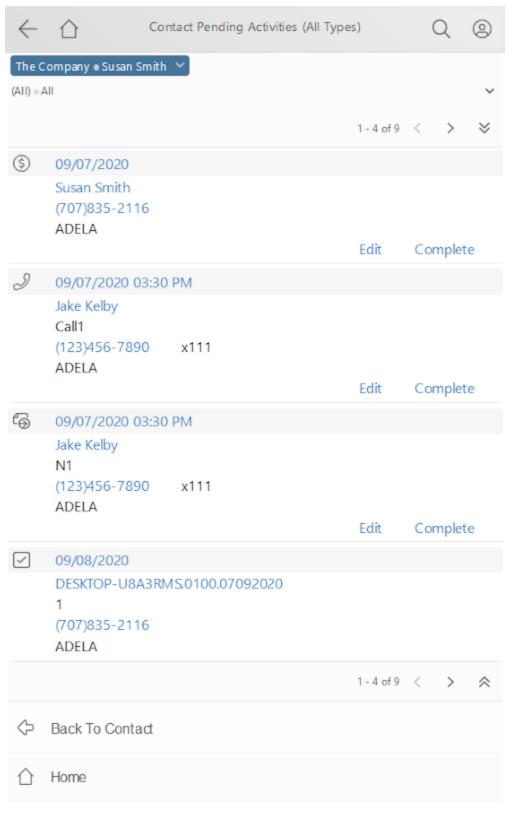
 The number next to each activity type indicates the number of that type for the current contact. For example, of the nine (9) Pending Activities show here, two (2) are Sales.

Activity Icon Key:
Icon Type

Calls

Appointments

Others

Next actions

Events

The top of the list displays the filtering you chose (if any) and the record count. Below that is the list of pending activities. From this list, you may view an activity by selecting its **date/time** link (which is displaying the actual date and time the activity is scheduled for). Select the Edit link to open the activity to be edited or select the Complete link to complete the activity.

← ⌂   Contact Pending Activities (All Types)   🔍 👤

The Company ● Susan Smith ⌄

(All) ● All   ⌄

1 - 4 of 9 ‹ › ⌄⌄

💲 09/07/2020

Susan Smith
(707)835-2116
ADELA

                                             Edit   Complete

📞 09/07/2020 03:30 PM

Jake Kelby
Call1
(123)456-7890   x111
ADELA

                                             Edit   Complete

📞 09/07/2020 03:30 PM

Jake Kelby
N1
(123)456-7890   x111
ADELA

                                             Edit   Complete

☑ 09/08/2020

DESKTOP-U8A3RMS.0100.07092020
1
(707)835-2116
ADELA

1 - 4 of 9 ‹ › ⌃⌃

⇦ Back To Contact

⌂ Home

＋
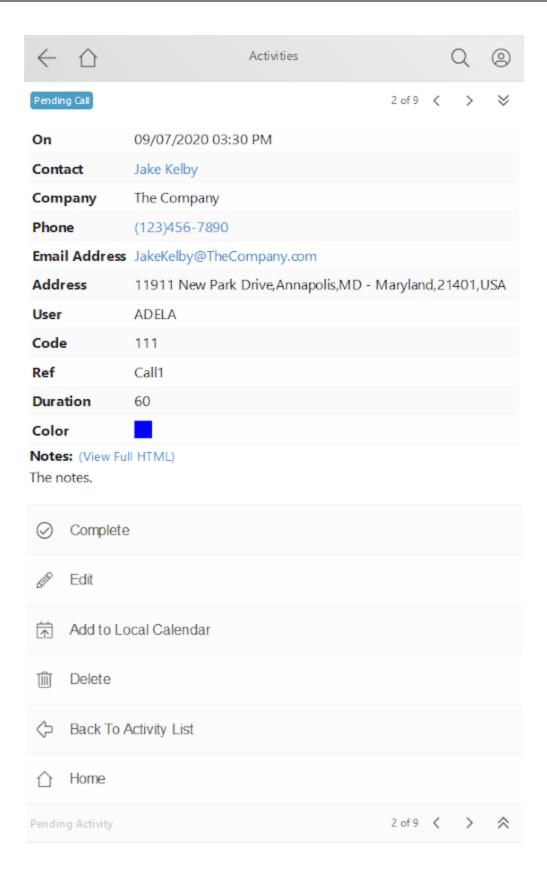
"**+**" button **(New Pending Activity)**: This link will allow you to schedule an activity.

Back to Contact: This link will return you to the [Contact Detail](#) page.

Home: Returns you to the [Home Menu](#).

After tapping on a link for a pending activity, the details page will appear. This is an example of the details page for a pending call.

	Activities		

On	09/07/2020 03:30 PM
Contact	Jake Kelby
Company	The Company
Phone	(123)456-7890
Email Address	JakeKelby@TheCompany.com
Address	11911 New Park Drive,Annapolis,MD - Maryland,21401,USA
User	ADELA
Code	111
Ref	Call1
Duration	60
Color	■

Notes: (View Full HTML)
The notes.

⊘ Complete

✎ Edit

🗓 Add to Local Calendar

🗑 Delete

⬅ Back To Activity List

⌂ Home

Pending Activity   2 of 9 ‹ › ⌃

Complete: This link will take you to a page for completing the activity.
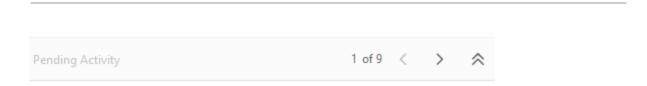
Edit: This link will take you to a page for editing the activity.

Add To Local Calendar: Adds the pending activity to the local calendar on your handheld device. The Add To Local Calendar functionality can be restricted by the wMobile administrator.

Delete: Tap this link to delete the pending activity.

Back to Activity List: This link will return you back to the list of Pending Activities.

Home: Returns you to the Home Menu.

Pending Activity   1 of 9   <   >   ∧

Navigation buttons are available for moving through the list of pending activities if all cannot fit onto a single screen.
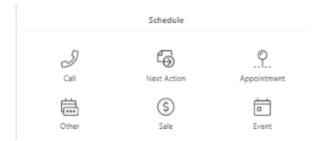
5.5.8.1 Schedule Activity

wMobile allows you to create scheduled activities for tasks you need to do in the future. This might be a call you need to make, an appointment for a sales meeting, or even a forecasted sale you would like to track.
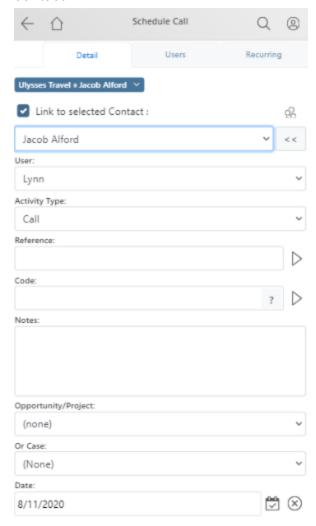
Use the " **+** " button on the Pending section of the **LINKED** tab of the contact to add a new Pending activity.

Pending (3)   ∨ ⊕

History (0)   ⊕

Choose the specific type of activity to be scheduled (i.e., **Call**, **Next Action**, **Appointment**, **Other or Event**).
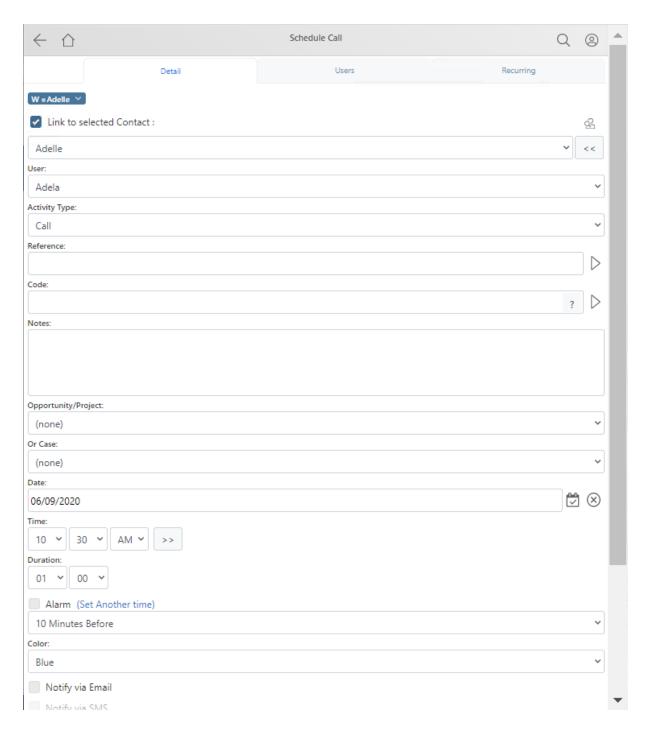
Enter the activity information. If there are primary and additional contacts on the record, use the down arrow at the end of the Contact field to toggle to a different associated contact.

After selecting a contact, enter the data for the activity you are scheduling. The **Detail** and **Users** tabs at the top of the page switch between the scheduled activity and a list of users. You can switch between the activity detail and the user list at any time.

If you wish to schedule the activity for additional users, tap the **Users** tab at the top-right corner of the window. Select any additional users from the list.

When scheduling activities, certain fields, like **Reference** and **Code** will allow you to choose from a drop-down list or type in your own entry within the text box.
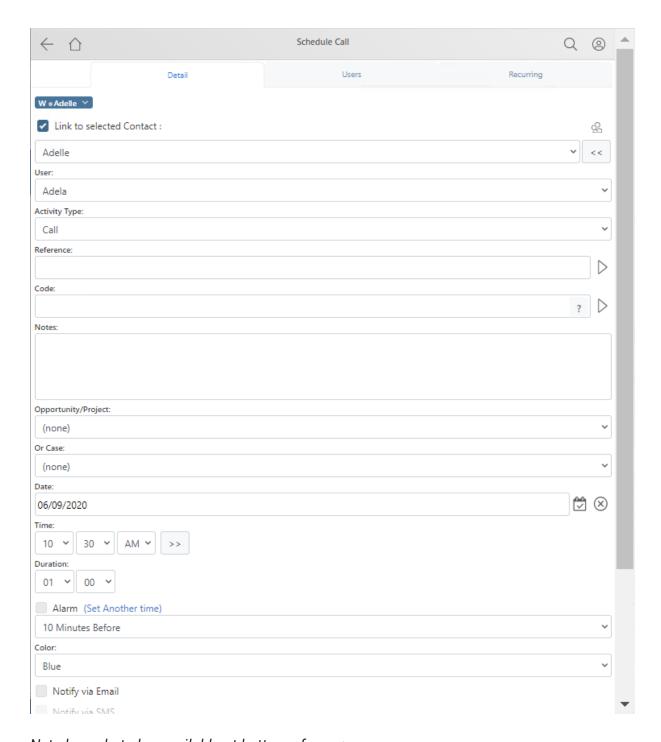
> ⚠ **NOTE**: Please refer to the General Editing topic for general editing instruction details for using drop-down lists and text boxes.

If you need to schedule this activity for a different user or a different linked contact, select them from the drop-down lists. Other available fields are **Reference**, **Code**, **Notes**, and **Opportunity/Project** or **Case**.

Set the **Date**, **Time**, and **Duration** entry drop-downs. You may also optionally select a color for the activity.

You may optionally set an alarm for this activity by placing a tick in the checkbox and setting a date and time for the alarm to occur. These alarms will occur in GoldMine only and not on your mobile device, unless Notification Services have been configured to deliver alarms via email or SMS text.

Tap the **Save** button on either the **Detail** or **Users** tabs to save the activity. This new activity will appear immediately in wMobile and GoldMine.

Not shown but also available at bottom of page:
Cancel: Close this page without saving the activity.
Home: Returns you to the Home Menu.
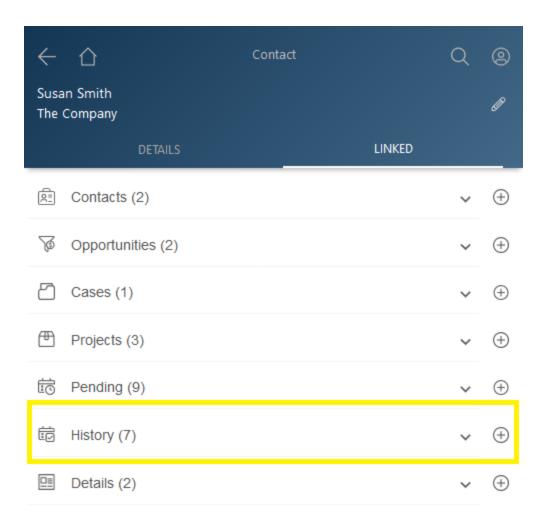
Activities can also be scheduled directly from the calendar.
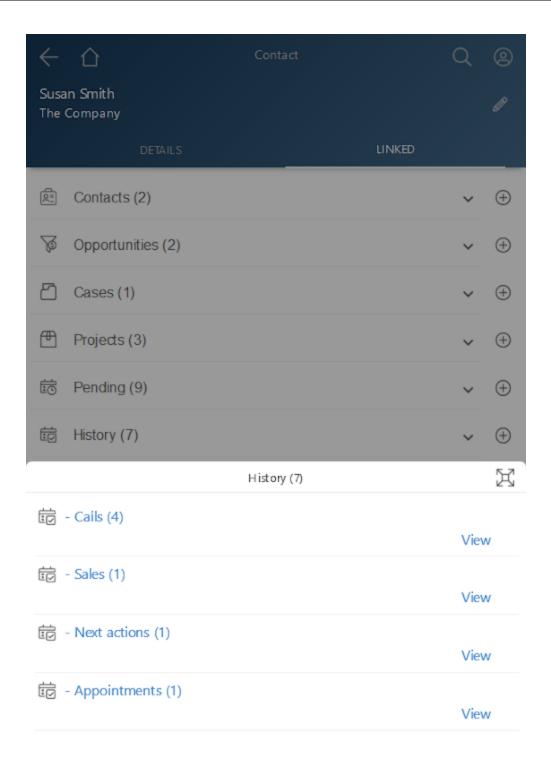
5.5.9   View History

Another option after selecting a contact is to view any or all of the contact's historical data. This will give you a means for easily reviewing recent history before calling or visiting a contact.

Select the **LINKED** tab to see **History** activities related to the contact. Tap on the down arrow in the History section to expand the list. New activities can also be added by tapping on the " **+** " button on the History line.
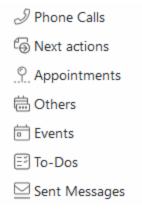
In this example a list of seven (7) history activities will be displayed for "All" of the available activity types. To view history records for one specific activity type, tap on History list and then tap on the specific record type of activity.
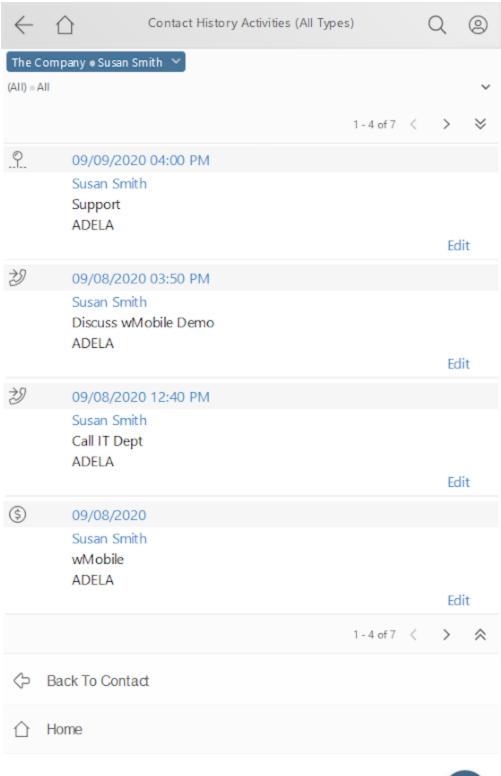
Activity Icon Key:
Icon Type

Phone Calls
Next actions
Appointments
Others
Events
To-Dos
Sent Messages

The top of the list displays the filtering you chose (if any) and the record count. Below that is the list of history records. From this list, you may view the history data by selecting its **date/time** link (which is displaying the date and time the activity had taken place) or select the Edit link to open the activity to be edited. Tap the link for the activity to view to the activity details page (see below).
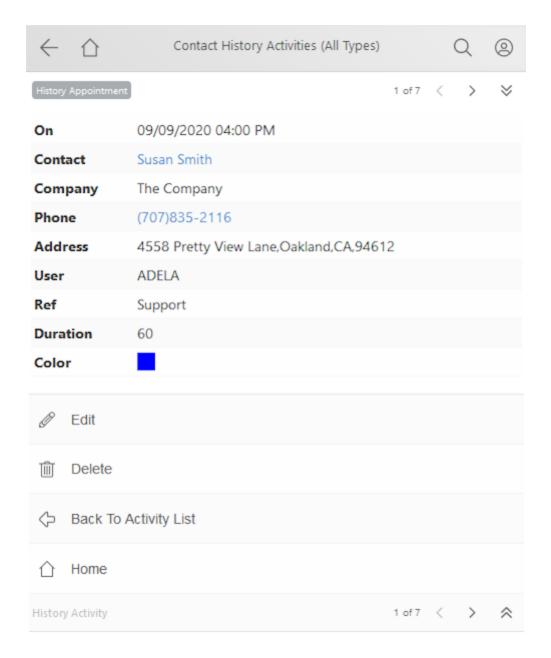
"**+**" button (**New History Activity**: This link will allow you to schedule an activity.

Back to Contact: This link will return you to the [Contact Detail](#) page.

Home: Returns you to the [Home Menu](#).

After tapping on a link for a history activity, the details page will appear. This is an example of the details page for a completed appointment.

Edit: This link will take you to a page for editing the activity.

Back to Activity List: This link will return you back to the list of Completed Activities.

Delete: Tap this link to delete the Completed Activity.

Home: Returns you to the Home Menu.

History Activity   1 of 4 ‹   ›   ⌃
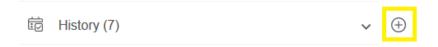
Navigation buttons are available for moving through the list of history items if all cannot fit onto a single screen.

5.5.9.1   Complete Unscheduled Activity

There are many instances when you may need to log a historical record of an activity you have completed that was not previously scheduled. An incoming call from a customer would be an example. The **Complete Unscheduled Activity** feature allows you to create a history record for tasks you have completed without the need for a pre-existing scheduled activity.

From the **History** section of the Contact **LINKED** tab, tap on the " **+** " button to **Complete Unscheduled Activity.** You may choose the specific type of activity to be completed (i.e., **Call Out**, **Call In**, **Next Action**, **Appointment**, **Other**, **Sale**, **To-Do**, or **Event**).

History (7)   ⌄   ⊕

> ⚠ **NOTE**: Please refer to the General Editing topic for general editing instruction details for using drop-down lists and text boxes.

The page that appears will allow you to enter the data for the activity type you wish to create a history record for. When completing unscheduled activities, certain fields, like **Reference** and **Code** will allow you to choose from a drop-down list or type in your own entry within the text box.
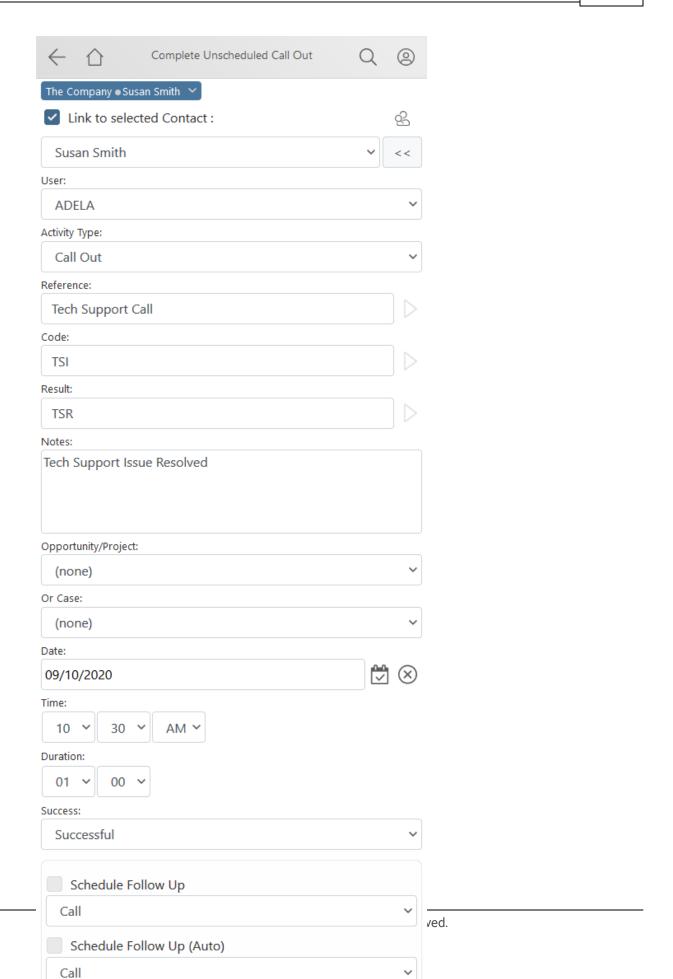
If you need to assign this activity to a different user or a different linked contact, select them from the drop-down lists. Other available fields are **Reference**, **Code**, **Result**, **Notes**, **Opportunity/Project**, or **Case**.

Set the **Date, Time, Duration**, and **Success** entry drop-downs.

You may optionally schedule a follow up activity by placing a tick in the checkbox and selecting an activity type from the drop-down list. If **Schedule Follow Up** is ticked, then immediately after **Save** is selected, you will be in edit mode to create the follow up activity

record. Ticking the **Schedule Follow Up (Auto)** will create a pending activity for you, scheduled based on the number of days selected without the new record needing to be edited.

Tap the **Save** button to save the completed unscheduled activity. This activity will appear immediately in GoldMine.

Cancel: Close this page without saving the activity.
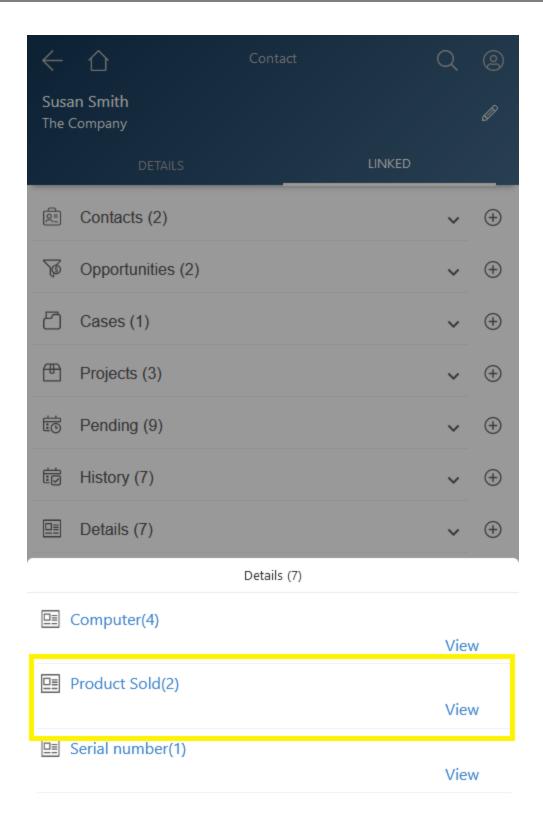
Home: Returns you to the Home Menu.

5.5.10 View Details
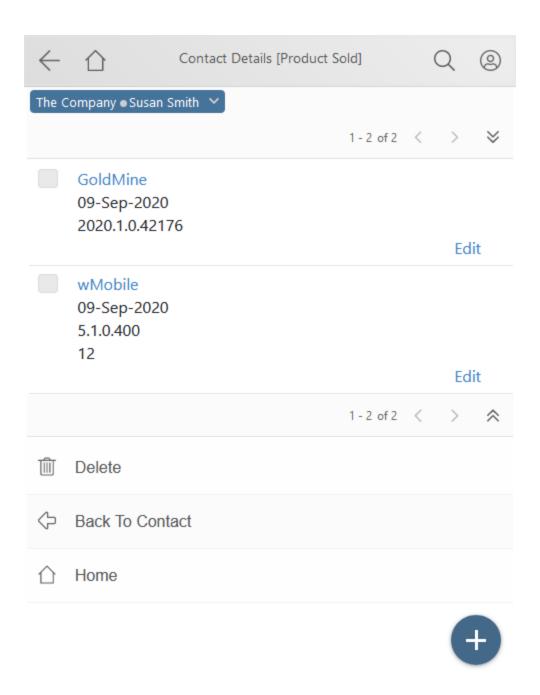
Details are used in GoldMine to store custom information. They keep track of multiple pieces of information such as products sold, serial numbers, account numbers, etc. Details can have up to twelve (12) associated fields in GoldMine Premium Edition. As an example, a Product Sold custom detail might include the product name, version, model number of the product, date sold, license number etc.

If the account being viewed has details already associated with it, this section will be seen on the contact view LINKED tab in wMobile. As previously noted, wMobile was designed for view on mobile devices, so if no details exist that are linked to the account, this section will not be displayed.

If the contact has multiple details, they'll be listed with the number of details in parentheses. In this example, a list of seven (7) Details will be displayed for "All" of the available Details. To view specific types of Details, tap on the down arrow in the Details line and a pop-up with all types of Details will be opened. Tap on "**View**" or tap on detail type (i.e., the hyperlink) to see the detail records.

The detail info will be displayed. To see all the associated detail data, tap on the detail name (i.e., the hyperlink).
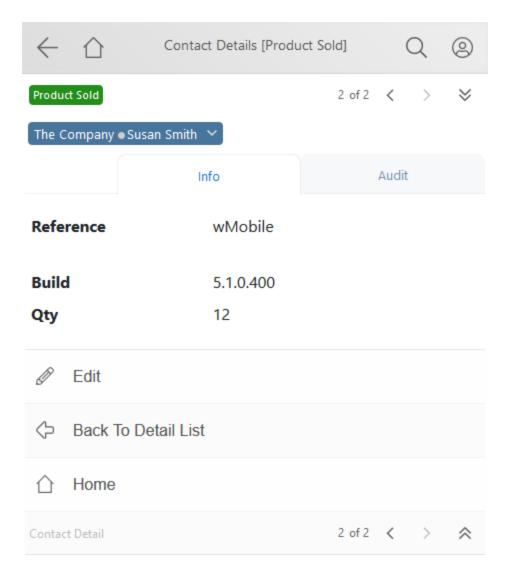
"**+**" button: Tap to open a page to add a new detail.

Delete: Place a tick in the checkbox of one or more details and tap on **Delete** to delete them (based on GoldMine permissions).

Back to Contact: This link will return you to the Contact Detail page.

Home: Returns you to the Home Menu.

After selecting a specific detail's hyperlink, the detail's page will open and display the data associated with that detail.
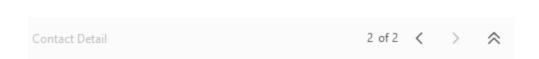
Use the [<] and [>] buttons to scroll through details if there are multiple details.

Edit: This link will take you to a page for editing the detail's data.

Back to Detail List: This link will return you back to the list of Details.
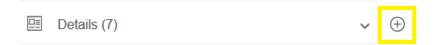
Home: Returns you to the Home Menu.

Contact Detail   2 of 2   <   >   ⌃
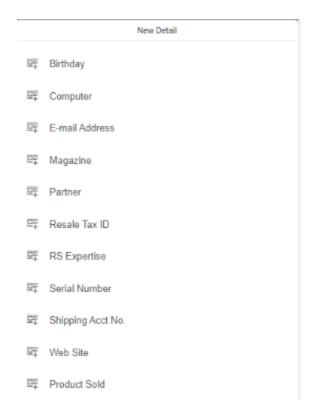
Navigation buttons are available for moving through the list of details if all cannot fit onto a single screen.

5.5.10.1 Add New Detail

To add a new **Detail**, tap on the "**+**" button on the Details section of the Contact **LINKED** tab.

Details (7)   ∨   ⊕
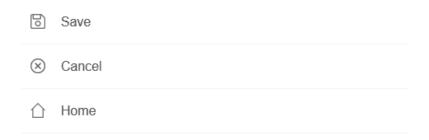
Select a detail type from the list. This list will reflect any custom Details created in your GoldMine software. Example detail types are shown below.

New Detail

- Birthday
- Computer
- E-mail Address
- Magazine
- Partner
- Resale Tax ID
- RS Expertise
- Serial Number
- Shipping Acct No.
- Web Site
- Product Sold

Enter the detail information as you would in GoldMine. Any field that has a lookup list in GoldMine will have the same lookup list in wMobile.

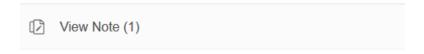When all the data has been entered tap **Save** to preserve the information.
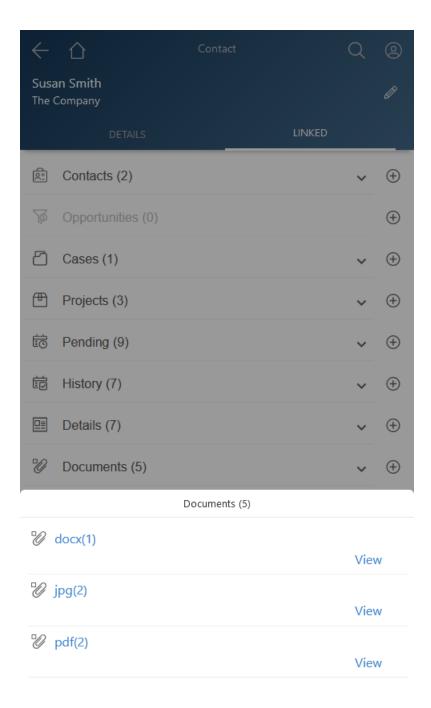
Tap **Cancel** if you do not wish to save the information or tap **Home** to return to the Home Menu.

5.5.11 View Documents

When a contact has linked documents associated with it, the **Documents** list will be present on the Contact Detail page, on the **LINKED** tab. The number in parentheses indicates the number of Documents linked to the contact. There are 5 in this example. Many types of documents can be linked to an account. These linked documents can include: email attachments, quotes, invoices, images, etc.

The user can select the Documents section to view the types of documents that are linked. A prompt will be displayed with all document types linked to the contact. After selecting the document "type" (e.g., pdf, docx, jpg etc.), tap the **View** button or tap on the document type (i.e., the hyperlink) to open the **Linked Documents** page.
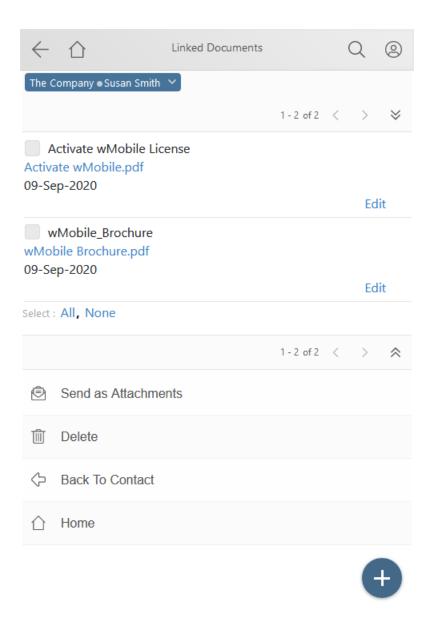
Depending on the user's selection, a list will appear like the one below. The user can open a document by tapping on the document name hyperlink in blue. The user must have an appropriate application on the device running wMobile in order to open a PDF file, a Word document, image files, etc.

CONFIGURATION NOTE: For linked document access to be successful,

configuration is needed in the wMobile Manager Console for Virtual File Settings.

If there are more than ten (10) use the **<** and **>** buttons to scroll through the documents.

Send as Attachments: Tick the checkbox for one of the documents to send as attachment.
Delete: Tick the checkbox for one of the documents to delete it.
Back to Contact:This link will return you to the Contact Detail page.
Home: Returns you to the Home Menu.
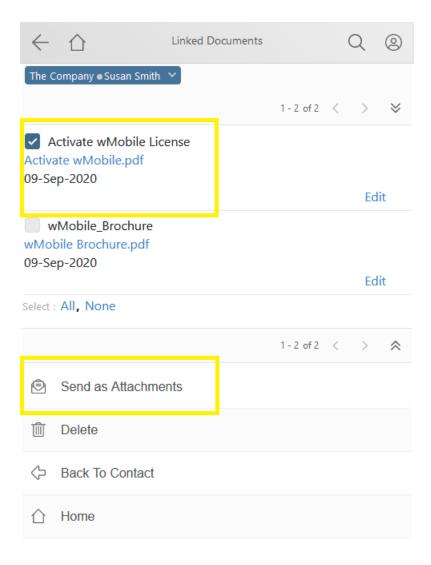
Related topics:

[Send as Attachments](#)
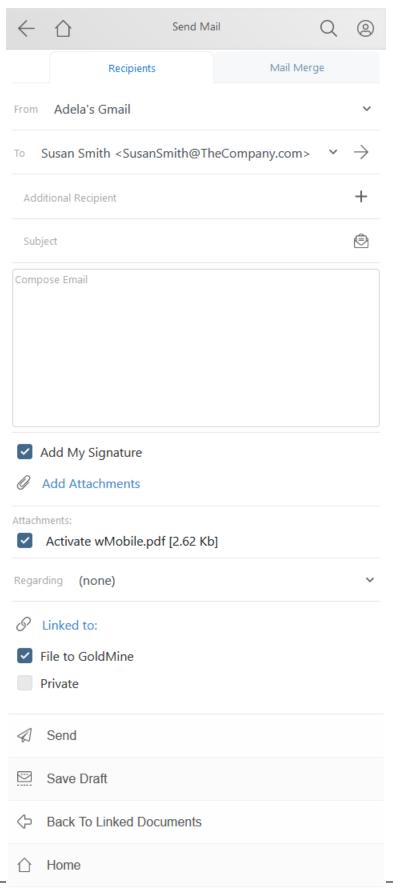
[Link New Document](#)

5.5.11.1 Send as Attachment

To forward a document via email, tick the checkbox for one of the documents in the list and then tap on the **Send as Attachments** hyperlink:
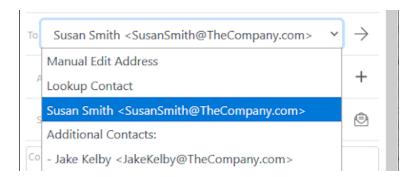
The draft email defaults to the current contact.
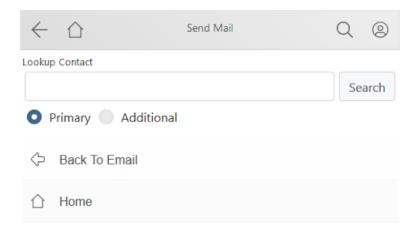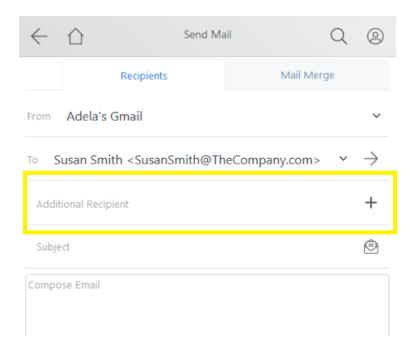
To send the document(s) to a different contact, either select that contact from those listed in the drop-down or select the **Lookup Contact** entry in the list and tap **Select** to open the **Lookup Contact** page:
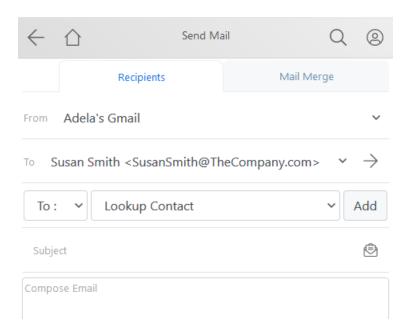
Search for the contact to send the email to:
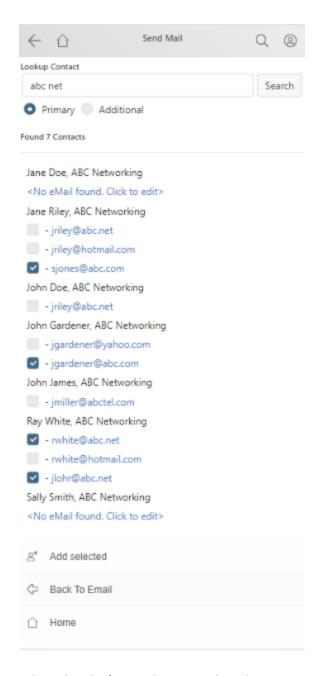
Tap on **Add Additional Recipients** to add CC'd contacts:
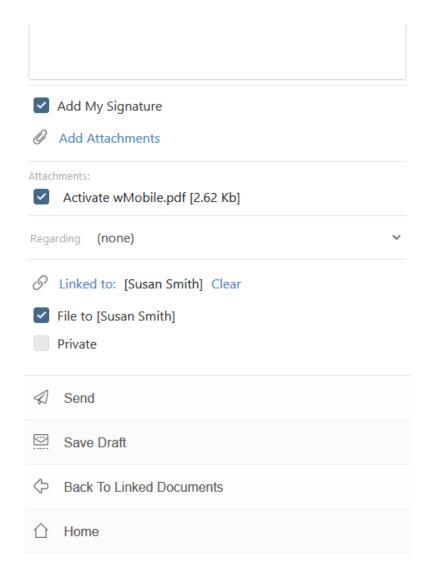
Either select an additional contact from the list or use **Lookup Contact** and **Add Recipient** to search for a different contact.

Multiple Additional Recipients can be added from the list at the same time as shown in the example below. Use **Add selected** to add all selected recipients to the email.

When the draft email is completed, tap on **Send**.

Send: Sends the email.
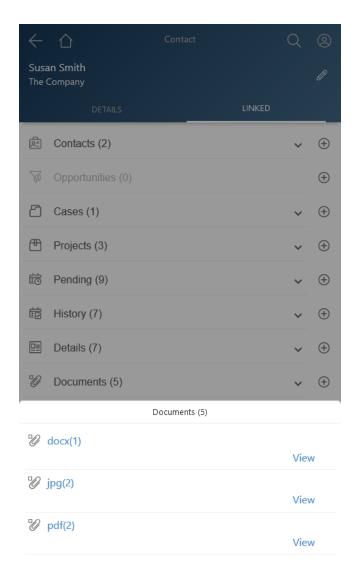
Save Draft: Saves the email as a draft to be sent at a later time.

Back To Linked Documents: This link will return you back to the list of linked documents.
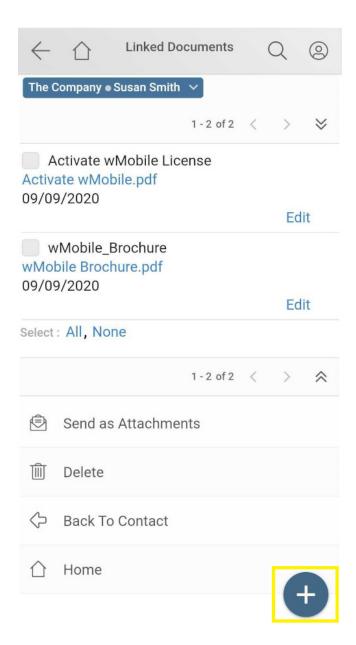
Home: Returns you to the Home Menu.

5.5.11.2 **Link New Document**

It's possible to link new documents from the mobile device such as photos or other files. On the Contact Detail page, **LINKED** tab select **Documents** list. After selecting the document "type" (e.g., pdf, docx, jpg etc.), tap the **View** button or tap on the document type (i.e., the hyperlink) to open the **Linked Documents** page.
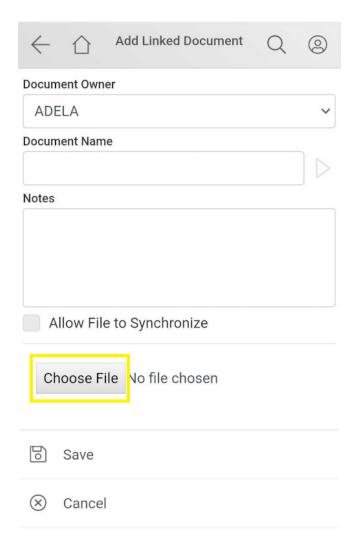
Select "**+**" button to link a new Document from the bottom of the records.
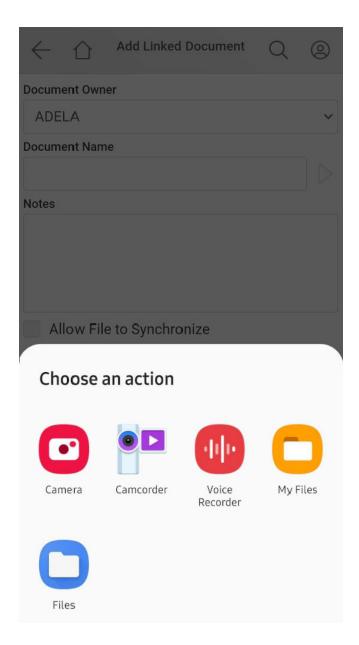
A new screen will be displayed to enter details on the new document and select the file.

Add a Document Name. Add any desired notes. Checkmark **Allow File to Synchronize** if there are remote GoldMine users that use GoldMine's synchronization functionality to sync data updates to a local GoldMine installation. Select **Choose File** to browse for the file on the mobile device.
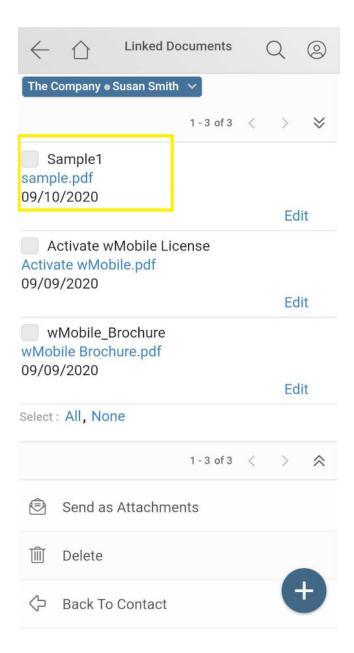
Select the appropriate option:

- To take photo, video or recorder select **Camera, Camcorder or Voice Recorder**
- Select a file from **My Files** or **Files**

Once the file is selected, tap on **Save**. The document will then be linked to the contact record and available for any other GoldMine/wMobile users to view (if their record access permits them to view the record). Documents are listed with the most recent at the top of the list.
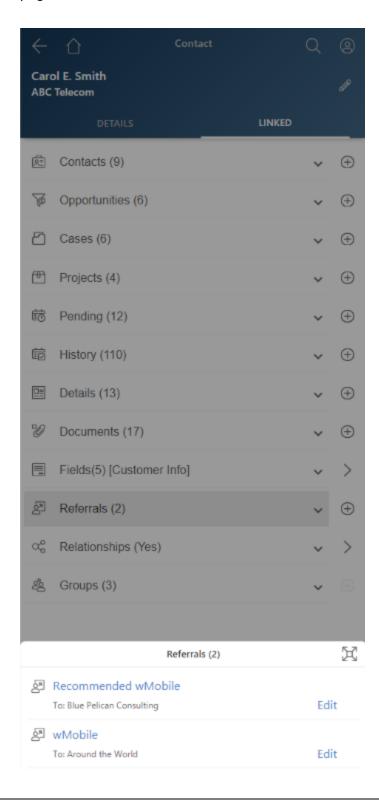
Configuration settings for where uploaded documents will be stored on the server can be found in System Settings.

5.5.12   Referrals
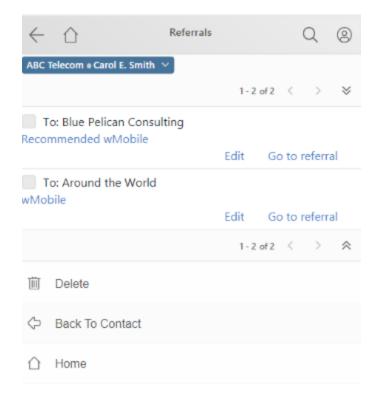
Referrals are used in GoldMine to create a link between two contact records.

If a contact has linked referrals associated with it, you will find them on the Contact Detail page. Select the **LINKED** tab. The number in parentheses indicates the number of **Referrals**

for the contact. Select the **Referrals** section. It will open a pop-up with all referrals linked on this contact. Tap on the on the expand button (⤢   ). This will display the **Referrals** page.

From the **Referrals** list page you can navigate to the referral contact by tapping on the referral hyperlink in blue or selecting **Go To Referral**. Use the Edit option to edit the referral information.

"**+**" button: Use this button to add a new Referral.
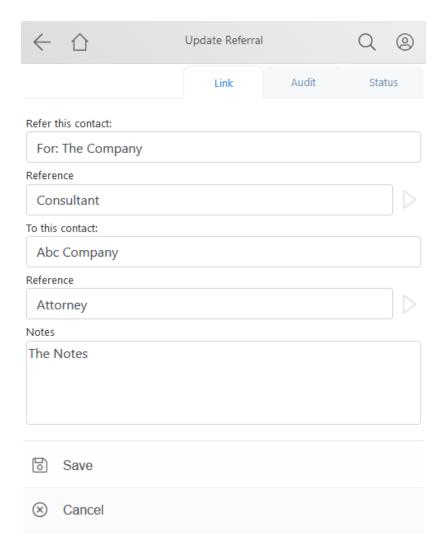
Delete: Place a tick in the checkbox of one or more details and tap on **Delete** to delete them.

Back to Contact: This link will return you to the Contact Detail page.

Home: Returns you to the Home Menu.

After tapping on the Referral Name or the Go to Referral hyperlink, the Contact Detail page of the referred contact will be opened.

Tap on **Edit** to update the Referral details.

Tap **Save** to preserve the information or tap **Cancel** if you do not wish to save the information.
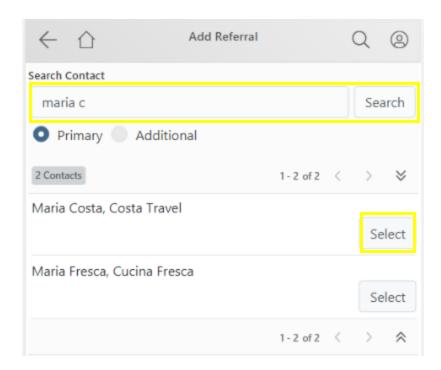
Navigation buttons are available for moving through the list of contact if all cannot fit onto a single screen.

5.5.12.1 New Referral
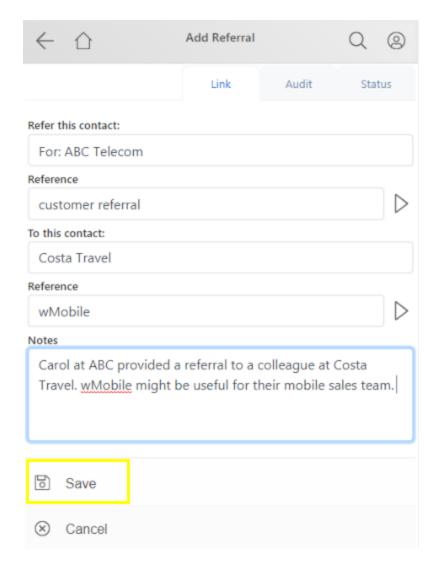
To add a new Referral, tap on "**+**" button on the Referrals section of the Contact **LINKED** tab.

Search for the contact for which you're adding a referral and use the Select button when the contact is found.

Enter referral information as appropriate.

Tap **Save** to preserve the information or tap **Cancel** if you do not wish to save the information.
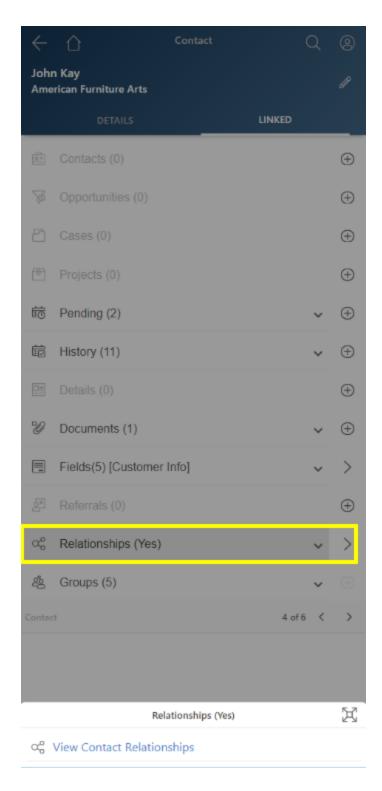
5.5.13 Relationships

Relationships are used in GoldMine to show relationships between records. In earlier versions of GoldMine, these were also referred to as Org Charts.

If a contact has linked Relationships associated with it, you will find them on the Contact Detail page. Select the **LINKED** tab. If the contact is part of a Relationship/Org Tree, the section will be present showing Yes in parentheses.

Select the **Relationships** section. It will open a pop-up with the option to **View Contact Relationships**. Select **View Contact Relationships** or tap on the on the expand button (
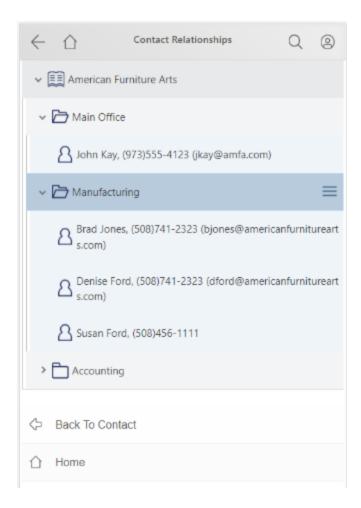
) to display the **Relationships** page.

The Relationship Tree will be displayed from the top level.
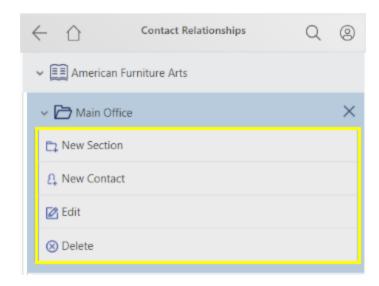
Use the arrow(s) to expand the tree and folders, if present.
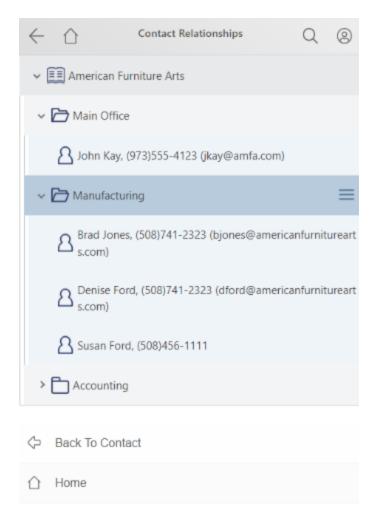
Tap on any section of the Relationship tree and use the hamburger menu (the three horizontal lines) to access Relationship options.

A menu options will be displayed to add a **New Section**, **New Contact**, or to **Edit** or **Delete** the Relationship (based on GoldMine permissions).

Use the "**+**" button at the bottom of a Relationship tree to add a new Relationship. Once a Relationship is created, additional sections can be added.
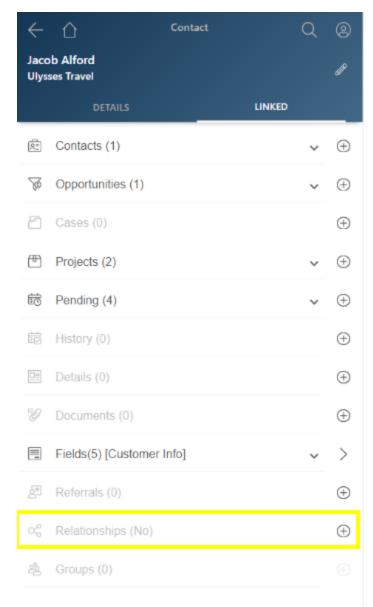
Back to Contact: This link will return you to the [Contact Detail](#) page.
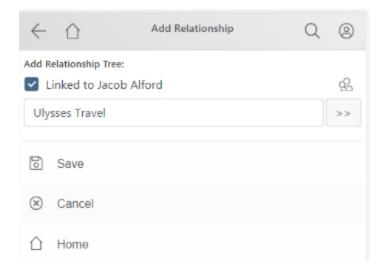
Home: Returns you to the [Home Menu](#).

5.5.13.1 New Relationship
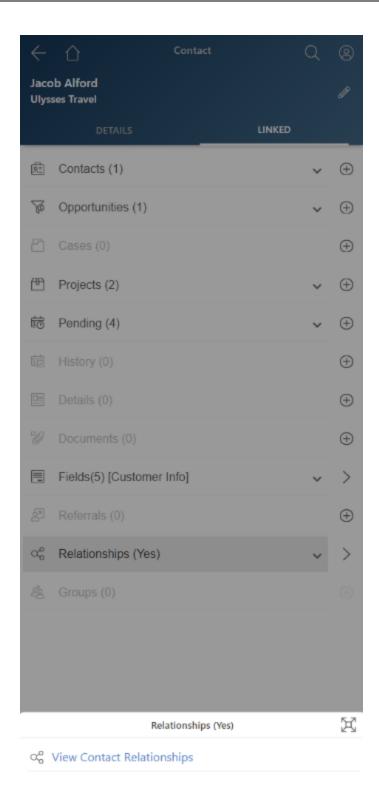
If no Relationship is present on the contact, the Relationships section on the Contact **LINKED** tab will be grayed out and (No) will appear to indicate this contact is not currently a member of a Relationship. Use the **+** button to add a new Relationship.
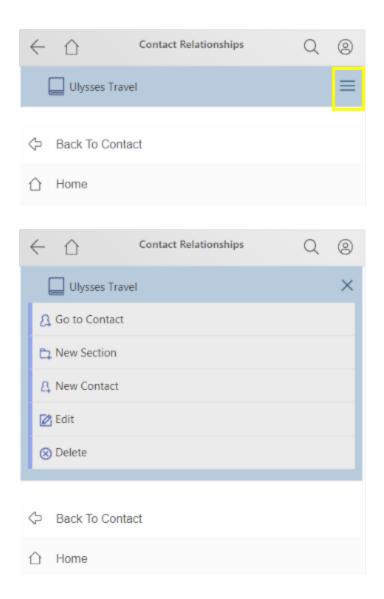
Select **Save** to create a Relationship.

Select **View Contact Relationships** or tap on the on the expand button ( ) to display the **Relationships** page.

Use the hamburger menu (the three horizontal lines) to **Go to Contact**, add a **New Section**, **New Contact**, or to **Edit** or **Delete** the Relationship (based on GoldMine permissions).

Back to Contact: This link will return you to the Contact Detail page.
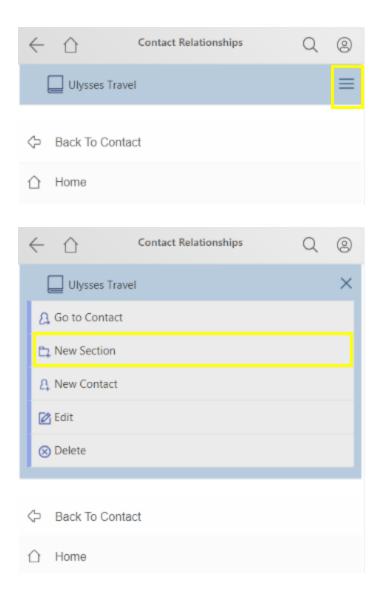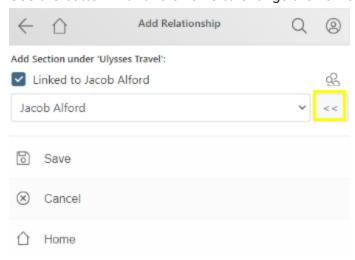
Home: Returns you to the Home Menu.

5.5.13.1.1 New Section
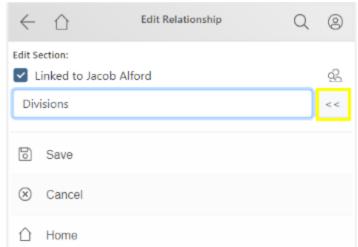
Use the hamburger menu (the three horizontal lines) to **Go to Contact**, add a **New Section**, **New Contact**, or to **Edit** or **Delete** the Relationship (based on GoldMine permissions).

Use the button with two arrows to change the name of the section.
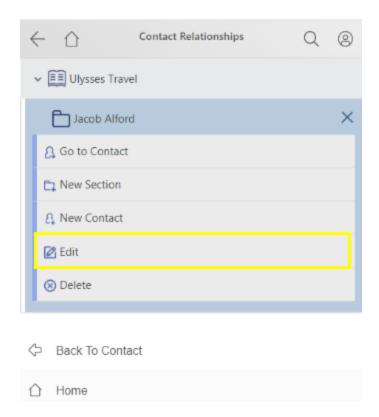
Update the section name as desired.

Select **Save** to link the new section to the Contact.

If you forget to update the section name during creation, expand the relationship tree and use the hamburger menu to select **Edit** to rename the section.
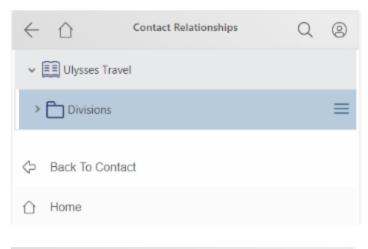
Use the same hamburger menu at the level of the new section to add a New Contact.
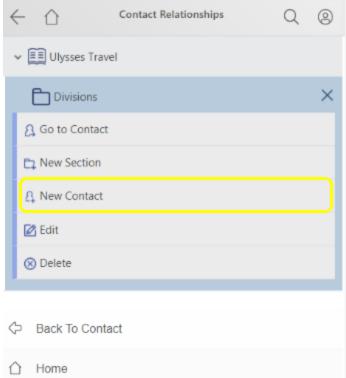
Back to Contact: This link will return you to the Contact Detail page.

Home: Returns you to the Home Menu.
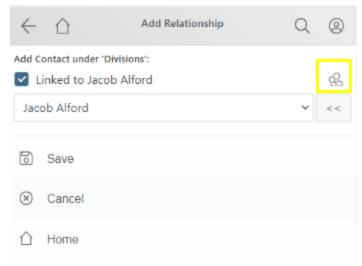
5.5.13.1.2 New Relationship Contact

Use the hamburger menu (the three horizontal lines) at the desired level of any relationship tree to add a **New Section**, **New Contact,** or to **Edit** or **Delete** the Relationship (based on GoldMine permissions). In this example, a new contact will be linked to the Divisions section of this Relationship tree.
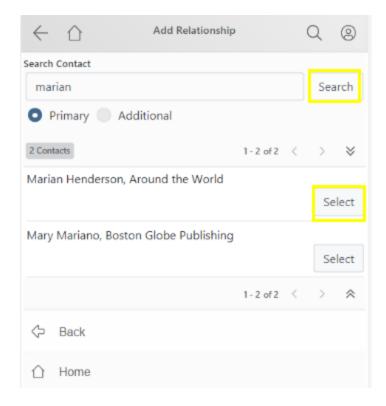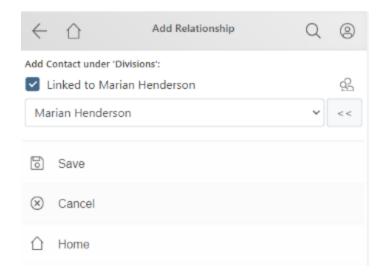
Use the person icon to search for the contact to link to this Relationship tree.
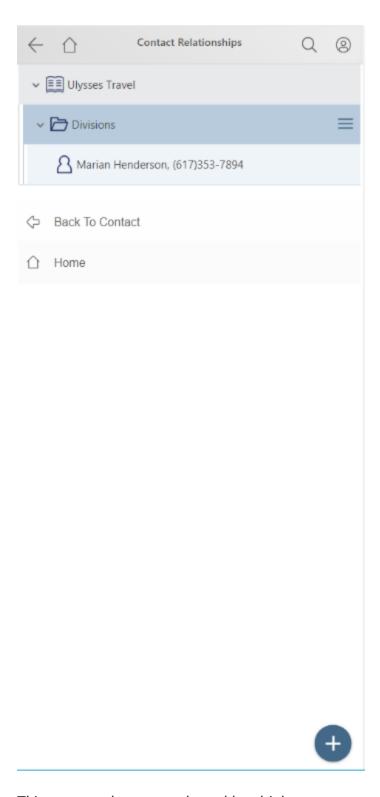
Enter the contact name or company name and select **Search**. Use **Select** button to select the appropriate Contact.

Select **Save** to add the new contact to the Relationship tree.

Expand the tree to see the new Contact added to the section.

This step can be repeated to add multiple contacts.
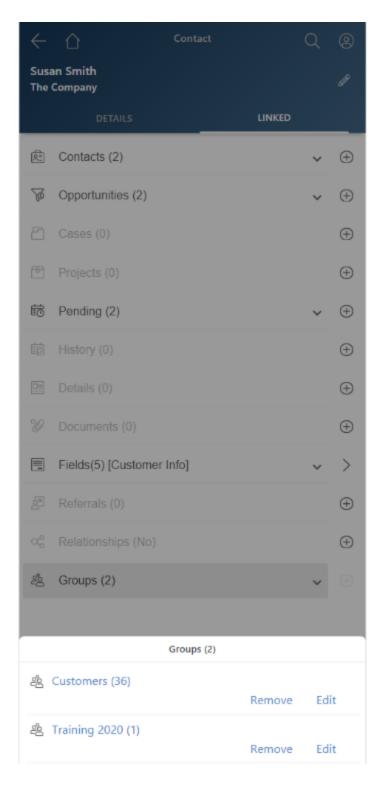
Back to Contact: This link will return you to the Contact Detail page.

Home: Returns you to the Home Menu.

5.5.14 View Groups

Groups are used in GoldMine to identify a static group of records. The group might be used for viewing in a list, for an email or letter merge, scheduling calls, etc.

If a contact is a member of a GoldMine Group, then this section will appear on the **LINKED** tab of the Contact screen. The number in parentheses indicates the number of Groups the contact is a member of. Select the **Groups** section. It will open a pop-up with all Groups this contact is a member of.
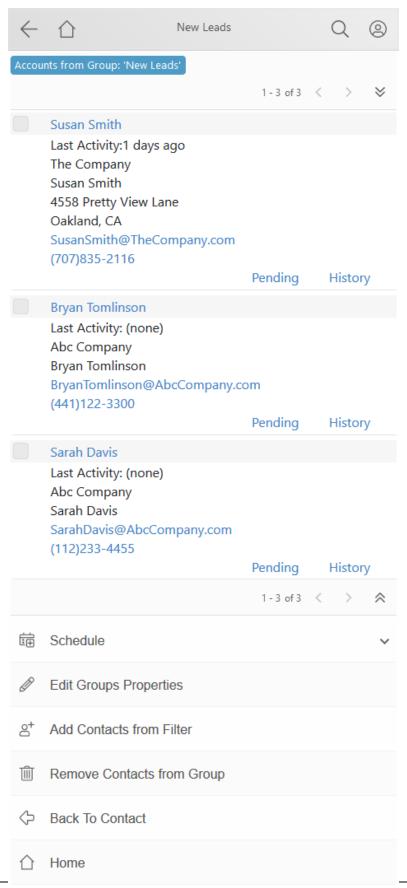
If a contact is a member of more than one GoldMine Group, each group will be listed in the Groups list prompt. The number in parenthesis is the number of members of the group. To view the other members of within a group, tap on the Group name.
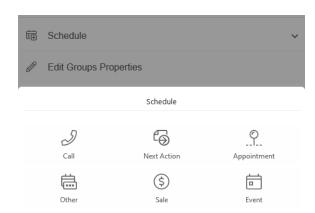
Select **Remove** to remove the contact from the Group.
Select **Edit** to update the Membership Reference.

As with any contact list in wMobile, any item underlined and in blue is a hyperlink and can be selected on to view that contact's detailed information, draft an email message, call a contact, or view Pending or History activities.
The other members of the group will be listed up to a maximum of ten (10) at a time. Use the [**<**] and [**>**] buttons to scroll to the next set of records.

New Leads

Accounts from Group: 'New Leads'

1 - 3 of 3 〈 〉 ⌄

Susan Smith
Last Activity:1 days ago
The Company
Susan Smith
4558 Pretty View Lane
Oakland, CA
SusanSmith@TheCompany.com
(707)835-2116

Pending   History

Bryan Tomlinson
Last Activity: (none)
Abc Company
Bryan Tomlinson
BryanTomlinson@AbcCompany.com
(441)122-3300

Pending   History

Sarah Davis
Last Activity: (none)
Abc Company
Sarah Davis
SarahDavis@AbcCompany.com
(112)233-4455

Pending   History

1 - 3 of 3 〈 〉 ⌃

🗓 Schedule   ⌄

✏ Edit Groups Properties

👤⁺ Add Contacts from Filter

🗑 Remove Contacts from Group

↩ Back To Contact

⌂ Home

Select **Schedule** to create an activity for all members of the group.

Select **Edit Group Properties** to edit the name or activity code of the Group.
Select **Add Contacts from Filter** to add members to the group.
Place a tick in the checkbox of one or more contacts in the list and then tap the **Remove contact(s) from Group** link to remove the selected contacts from the group (NOTE: The contact itself will not be deleted).

Tap **Back to Contact** to return to the Contact screen or **Home** to return to the Home Menu.
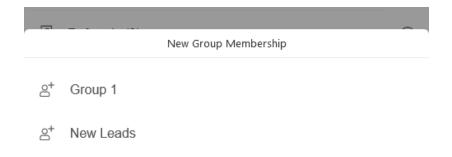
5.5.14.1 New Group Membership

A contact can be added to a GoldMine Group using the **New Group Membership** selection.
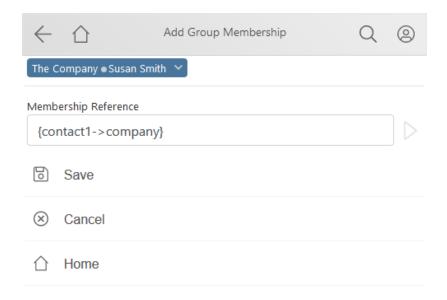
Regardless of whether a contact is already a member of a group or not, the + sign can be used to add the contact to an existing group.

Select the appropriate Group from the drop-down list and tap on its name.

New Group Membership

👤⁺ Group 1

👤⁺ New Leads

Add any **Membership Reference** and then tap on **Save**.

← ⌂   Add Group Membership   🔍 ⊚

The Company ● Susan Smith ⌄

Membership Reference

{contact1->company} ▷

💾 Save

⊗ Cancel

⌂ Home

Tap **Cancel** if you do not wish to save the information or tap **Home** to return to the Home Menu.

5.5.15   Notes (Contact)
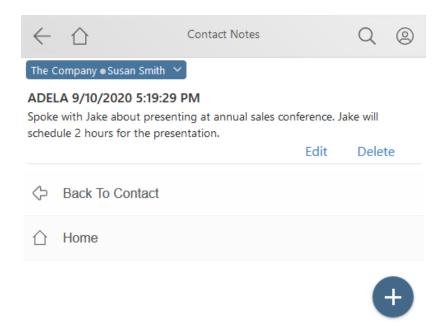
Contact notes play an important part of your contact management relationship solution. With the **View Notes (n)** link you can open the **Contact Notes** page to review the notes for the current contact.

- If there are no notes linked to the contact, the link will read **Add Note**.
- If there are notes, tapping the **View Notes (n)** link will open the **Contact Notes** page and display the notes. In the parenthesis after **View Notes** will be a number in parentheses indicating the number of existing notes for the contact.

This example shows that there is one (1) note linked to the contact:

View Note (1)

Sample of the **Contact Notes** page. The notes can be edited in wMobile using the **Edit** link or may be deleted using the **Delete** link (based on GoldMine permissions):

Contact Notes

The Company ● Susan Smith ⌄

ADELA 9/10/2020 5:19:29 PM
Spoke with Jake about presenting at annual sales conference. Jake will schedule 2 hours for the presentation.

Edit   Delete

Back To Contact

Home
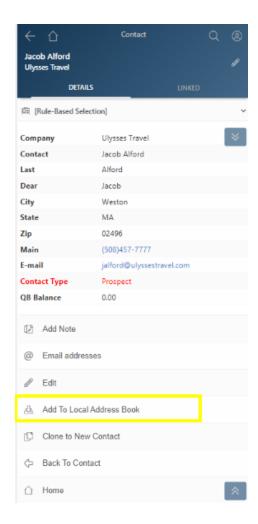
"**+**" button: Use this link to ad a new note to the contact.
Back to Contact: Returns you to the Contact Detail page.
Home: Returns you to the Home Menu.

5.5.16   Add to Local Address Book

The **Add To Local Address Book** option appears on the Contact **DETAILS** tab. Select **Add To Local Address Book** to send this contact to your phone's address book. Refer to the Contact Options in My Preferences to set the method to send contacts to the local address book.
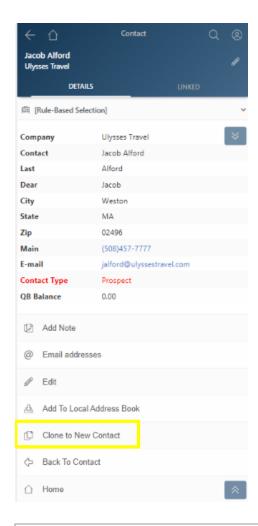
When you select to add a contact to your address book from the iPhone, you'll be prompted for an email address to send to.

📑 **NOTE**: In order for this function to work, there is some configuration required. This option may also be restricted in the wMobile Manager Console by the wMobile administrator.
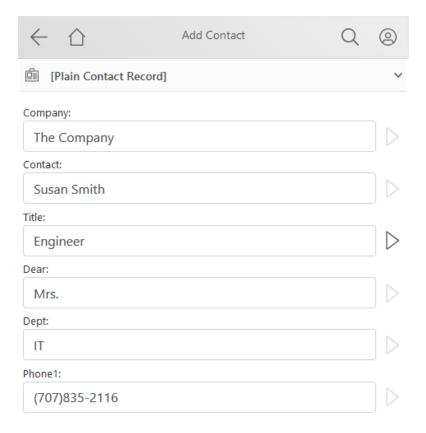
5.5.17 Clone To New Contact

Select **Clone to New Contact** to create a new new contact using the information from the current contact.
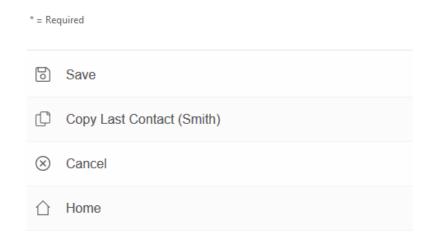
> 📑 **NOTE**: This option may be restricted in the wMobile Manager Console by the wMobile administrator.

Update the contact name and any other information as required. Field names that have an asterisk (*) next to them are "required" fields that you must enter data into while all other field entries are optional.

All field information will be copied over from the original contact.

Command links:

When all data has been entered tap the **Save** link.

Copy Last Contact (*contact_name*): Using this link will open an **Add Contact** page and pre-populate fields with data from the current contact.

Cancel: Returns you to the [Contact Detail](#) page without saving any changes made.

Home: Returns you to the [Home Menu](#).

5.6   Working with Contacts
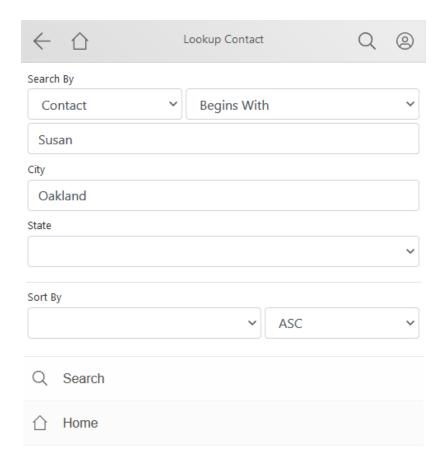
From your mobile device, you have many tools available to you for maintaining your contact data.

📄 [Contact Lists](#)
📄 [Contact Detail](#)
📄 [Contact Options](#)
📄 [Editing Pending Activities](#)
📄 [Completing Pending Activities](#)
📄 [General Editing (Drop-down Lists and Text Boxes)](#)
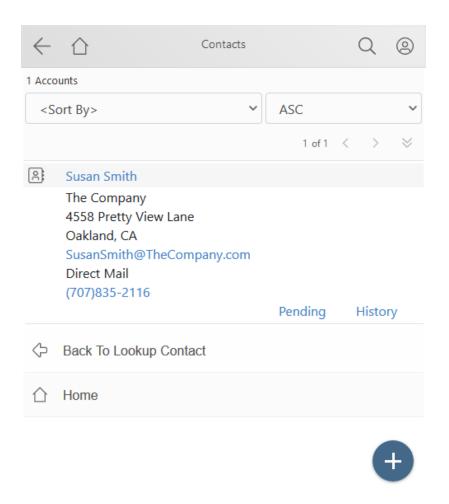
5.6.1   Contact Lists

After using the [Lookup Contact](#) search page, a list will display containing any contacts found that meet the search criteria you have entered. Each contact's name within this list is displayed as a link that when selected, will display that contact's data in the [Contact Detail](#) page. Another feature of this list is the Pending / History links that will allow you to view a contact's pending activities or view recent history.

The following example shows the [Lookup Contact](#) page ready to run a search for contact's that have the **Contact** field beginning with the text "**Susan**" (please note that searches are not case-sensitive). After entering your criteria, select **Search** to get a list of results.

The results are shown here in a list. As you can see, only one record was found meeting the criteria. Note also, the links: Pending / History for quick access to those activities and history.

"+" button: Use this button to create a new contact. This opens the Add Contact page.
Back to Lookup Contact: This link will return you to the Lookup Contact page.
Home: Returns you to the Home Menu.
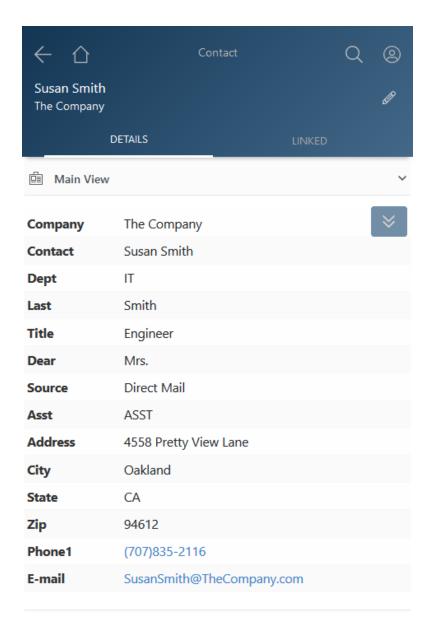
Navigation buttons are available for moving through the list of contact if all cannot fit onto a single screen.

5.6.2   Contact Detail

The **Contact Detail** page displays the majority of an individual contact's data.
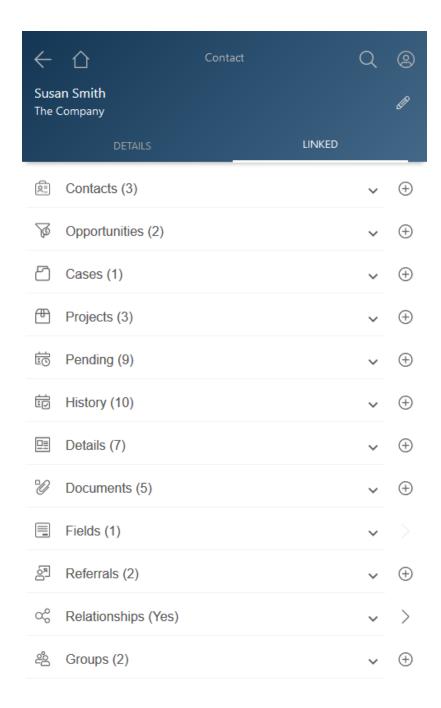
On the **DETAILS** tab, all of the basic contact information is displayed. This information includes the company and contact name, phone numbers, the contact's address, the

contacts email address, website and the KEY fields from GoldMine. The phone numbers, email address and website are presented as links. They can be selected to have your mobile device dial your phone, start an email message or browse to the contact's website. The positioning of these fields can be modified (up and down) by Customizing the contact screen in the wMobile Manager Console.

The **LINKED** tab displays additional information about the contact, such as Pending activities, History, Contacts (i.e. additional contacts) and more. The number in parentheses represents the total number of items in the list.
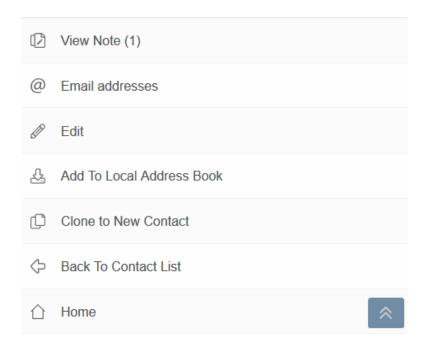
For example, in the screenshot, we see that there are 3 additional Contacts, 9 Pending activities, 10 History activities, 5 linked Documents, etc.

The following table describes which drop-down lists provide what types of information:

Drop-down	Description
Contacts	Additional contacts linked to the contact record.
Opportunities	Opportunities linked to the contact record.
Cases	Cases linked to the contact record.
Projects	Projects linked to the contact record.
Pending	Pending Activities and a breakdown of Pending Activities by type.
History	Completed Activities and a breakdown of Completed Activities by type.
Details	Details and a breakdown of Details by type, excluding E-mail Addresses and Web Sites.
Documents	Linked Documents and a breakdown of each by file type.
Fields	Custom fields screens.
Referrals	The contact Referrals.
Relationships	The contact Relationship
Groups	Groups of contact records this contact is a member of.

The "**+**" buttons allow the user to Create new contacts (New Contact), Schedule activities (New Pending), Complete unscheduled activities (New Completed), Create new detail records (New Detail), and Create new groups of contacts (New Group Membership).

View Note (1)

@ Email addresses

Edit

Add To Local Address Book

Clone to New Contact

Back To Contact List

Home

View Note (n): View and add contact notes. Please see details in the [Notes (Contact)](#) topic.

Edit: This link will take you to a page for [editing](#) the contact data.

Add To Local Address Book: Adds this contact's data to your device's local address book. Depending on your device you may be asked to confirm the addition. The **Add To Local Address Book** can be [restricted](#) by the wMobile administrator.

Clone to New Contact: Create a new new contact using the information from the current contact.

Home: Returns you to the [Home Menu](#).
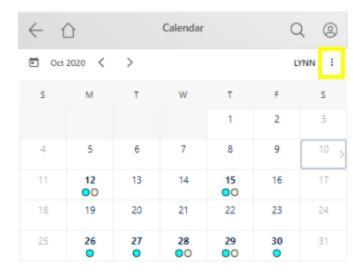
5.7   Working with the Calendar

wMobile's calendar will aid in graphically working with your activities. See activities and schedule them from the calendar views available.

📄 [Calendar Month](#)
📄 [Calendar Week](#)
📄 [Calendar Day](#)
📄 [Create New Activity](#)

5.7.1   Calendar Month

Below is an example of the calendar displayed in the **Month** format. To switch from one view to another view, tap on the Calendar options icon ⋮

Calendar options: The user menu calendar options will be opened.

The calendar views: Month Week or Day.

User: Change the calendar user.
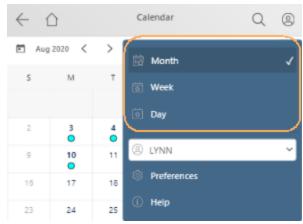
Preferences: This link will take you directly to the Calendar Preferences.

Help

Select Month to view activities by Month.
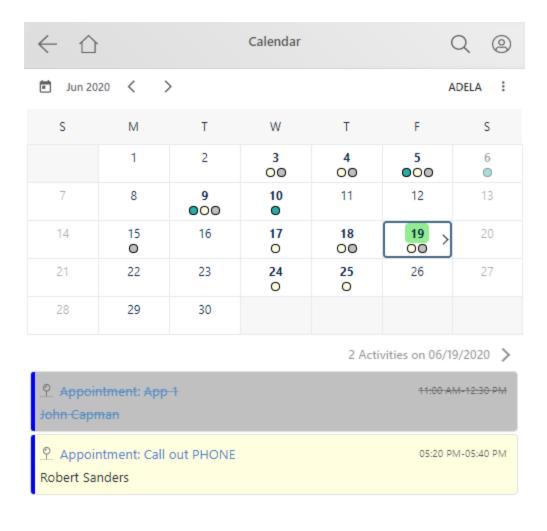
Use the [<] and [>] links on the calendar to display the previous month and next month respectively.

Any date on the calendar that has one or more activities scheduled will be displayed in **bold** typeface.

The current day is shown here with a green background (the 19th). This color is controlled using the **Today BackColor** setting in the Calendar Preferences and is a user specific setting.
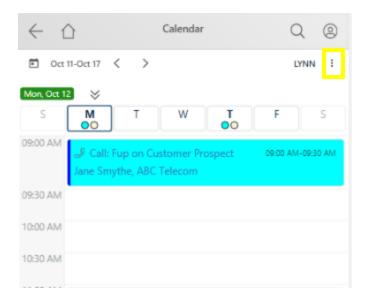
To create a **New Activity**, use the " **+** " button at the bottom of the calendar. For detailed steps, see: Create New Activity.

5.7.2   Calendar Week

Below is an example of the calendar displayed in the **Week** format. To switch from one

view to another view, tap on the Calendar options icon

Calendar options: The user menu calendar options will be opened.

The calendar views: Month Week or Day.

User: Change the calendar user.
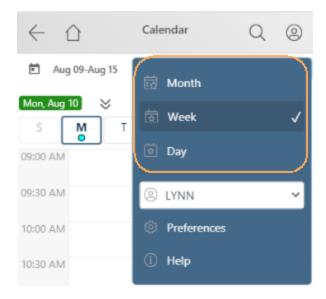
Preferences: This link will take you directly to the Calendar Preferences.

Help

Select Week to view activities by Week.

Use the [<] and [>] links to display the previous week and next week respectively.

For each day, there are navigation links to quickly take you to a specific day within the current week being viewed. The days that are not links are not enabled as "Work Days" in Calendar Preferences. See Saturday and Sunday in the following example:
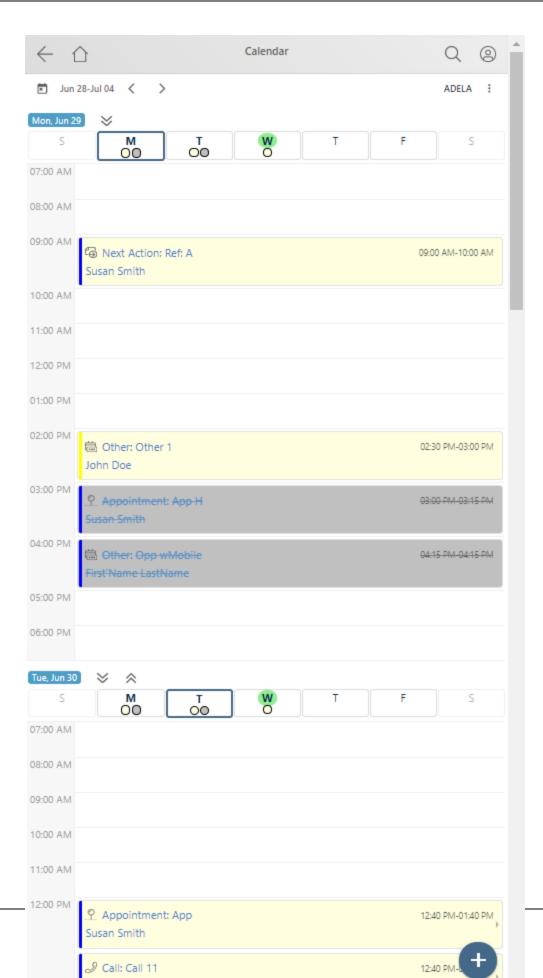
Activities that are scheduled for the week currently displayed will appear on the calendar. Tapping on an activity link will display the activity details.

Time of Day links:
Tapping a "time" link (e.g., 3:30 PM) on the Week or Day calendar view will start the process for scheduling an activity. See: Create New Activity for details.
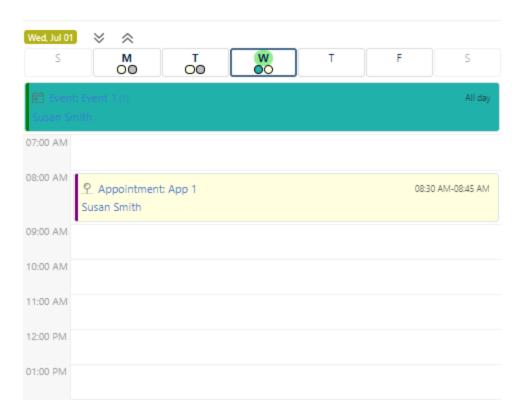
The colors for calendar items are controlled using settings in the Calendar Preferences.
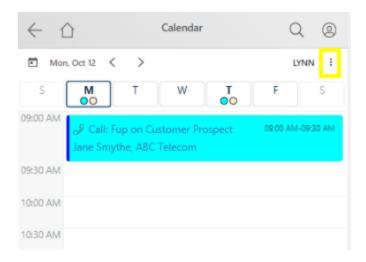
Events Display

When Events are set to be displayed, they are shown below the date they are scheduled for and above the time links. On the Day view of the calendar, Events are displayed the same way.

5.7.3   Calendar Day

Below is an example of the calendar displayed in the **Day** format. To switch from one view to another view, tap on the Calendar options icon ⋮

Calendar options: The user menu calendar options will be opened.

The calendar views: Month Week or Day.

User: Change the calendar user.
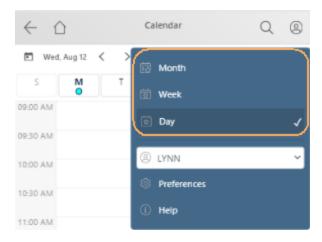
Preferences: This link will take you directly to the Calendar Preferences.
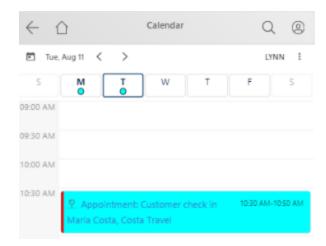
Help

Select Day to view activities by Day.

Use the [<] and [>] links to display the previous day and next day respectively.

For each day, there are navigation links to quickly take you to a specific day within the current week being viewed. The days that are not links are not enabled as "Work Days" in Calendar Preferences.
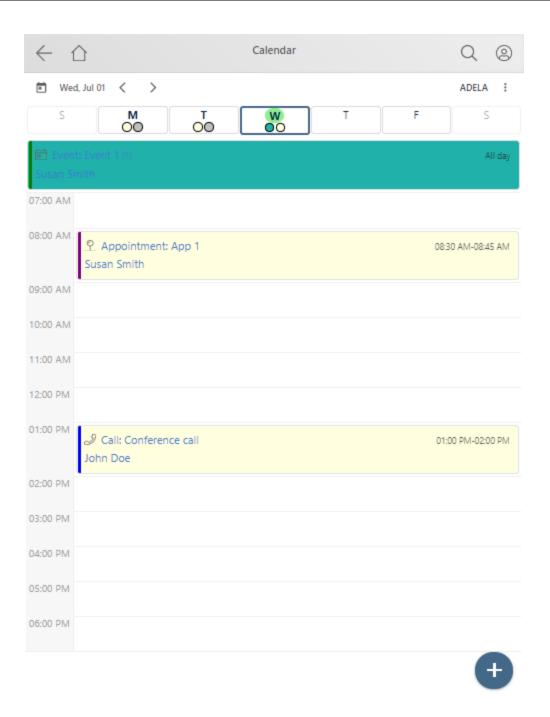
Activities that are scheduled for the day currently displayed will appear on the calendar. Tapping on an activity link will display the activity details.

Time of Day links:
Tapping a "time" link (e.g., 3:30 PM) on the Week or Day calendar view will start the process for scheduling an activity. See: Create New Activity for details.

The colors for calendar items are controlled using settings in the Calendar Preferences.
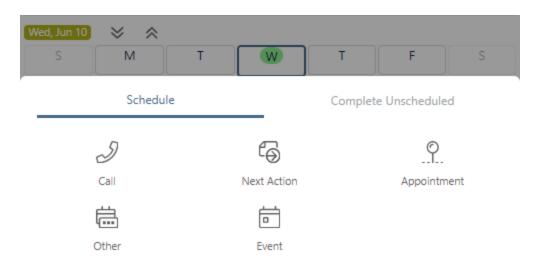
5.7.4 Create New Activity

Steps to create a new activity:
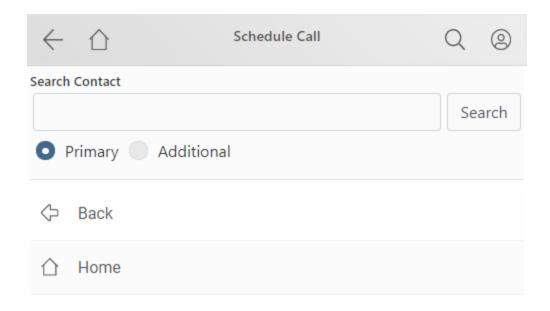
Tap on the " **+** " button from any of the calendar views (Month, Week, or Day), or tapping a "time" link on the Week or Day view.
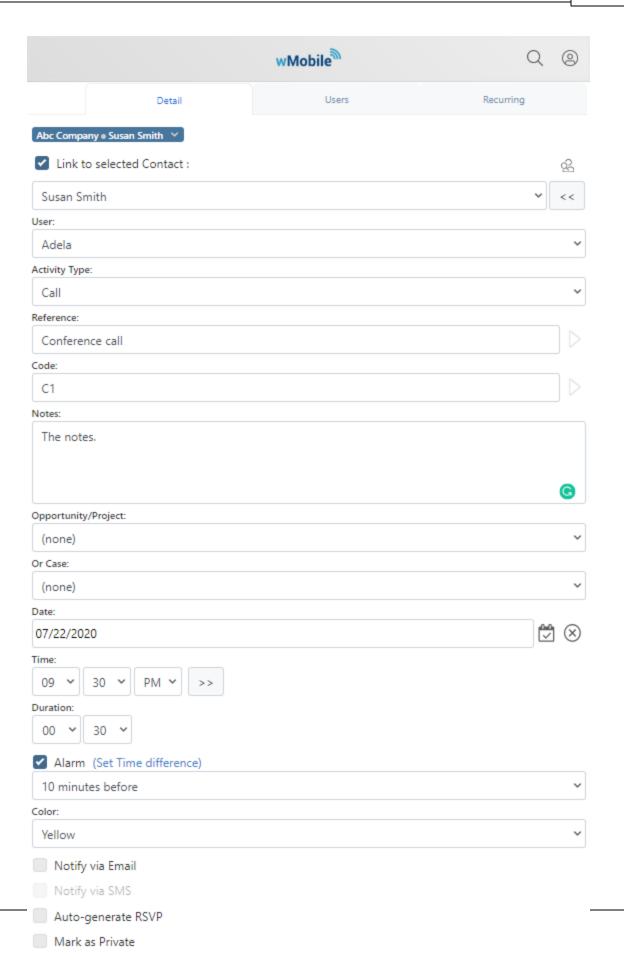
You may choose the specific type of activity to be scheduled (i.e., **Call**, **Next Action**, **Appointment**, **Other or Event**).

Next you will be prompted to search for a contact to schedule an activity for. (By default, in Calendar Preferences the 'Open 'Lookup Contact' on new activities' is set to prompt the user to search for a contact. Before the pending page is open, a contact must be selected.)

After entering search criteria, any contacts found will be listed. Select one of them and then the Schedule Activity page will be opened. After entering and saving the activity it will be displayed in the calendar.

5.8   Working with Activities
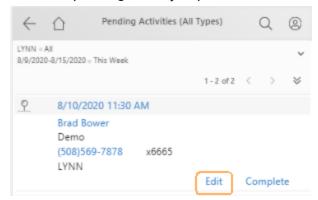
The activities in your database can be edited and/or completed using wMobile. You may need to reschedule an appointment or update the notes for an upcoming meeting or call to be made. After the meeting or call has been completed, you will want to track what occurred and store that information in history for future reference. These topics will detail how to accomplish these tasks.

📄 [Editing Pending Activities](#)
📄 [Completing Pending Activities](#)
📄 [Editing History Activities](#)
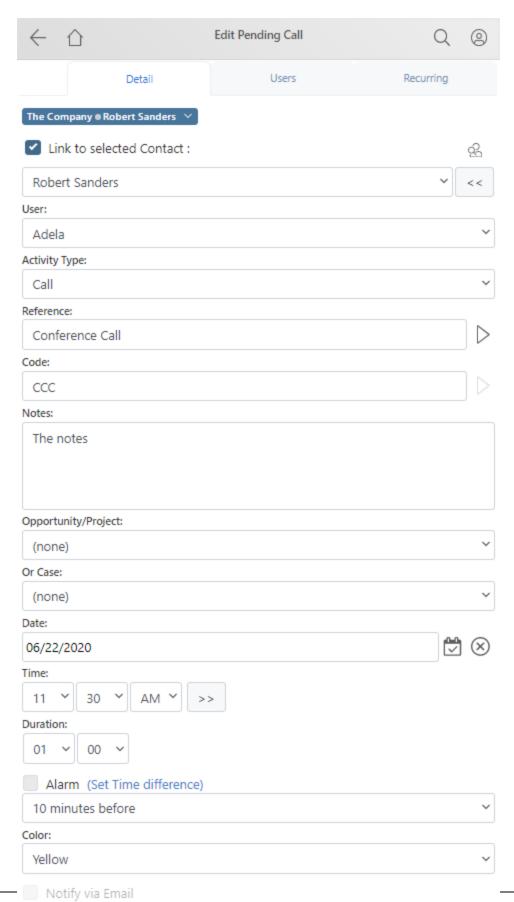
5.8.1   Editing Pending Activities

Pending activities can be edited within wMobile. Activities might be accessed from the Contact record LINKED tab, from the Calendar, from [Lookup Pending Activity](#) on the wMobile home menu, or the Dashboard.

To edit a pending activity, tap the **Edit** link when viewing activities displayed on a list page.

This is an example of a pending "call" on the editing page. The drop-down lists and text boxes are clearly labeled and self-explanatory. After making the necessary modifications to the activity being edited, tap the **Save** link to save the changes to the database.

← ⌂   Edit Pending Call   🔍 ⊚

Detail	Users	Recurring

The Company ● Robert Sanders ∨

☑ Link to selected Contact :   ⧉

Robert Sanders ∨	<<

User:

Adela   ∨

Activity Type:

Call   ∨

Reference:

Conference Call	▷

Code:

CCC	▷

Notes:

The notes

Opportunity/Project:

(none)   ∨

Or Case:

(none)   ∨

Date:

06/22/2020	📅	⊗

Time:

11 ∨	30 ∨	AM ∨	>>

Duration:

01 ∨	00 ∨

☐ Alarm (Set Time difference)

10 minutes before   ∨

Color:

Yellow   ∨

☐ Notify via Email

☐ Notify via SMS

☐ Auto-generate RSVP

Save: Save the edits made to the database.

Cancel: Returns you to the prior page without saving any changes made.
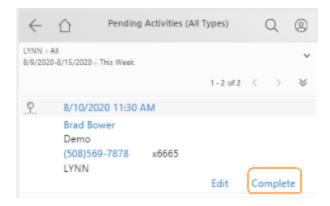
Home: Returns you to the Home Menu.

📑 **NOTE**: Other activities are edited in the same manner although the screen contents may appear slightly different depending on the type of activity being edited.
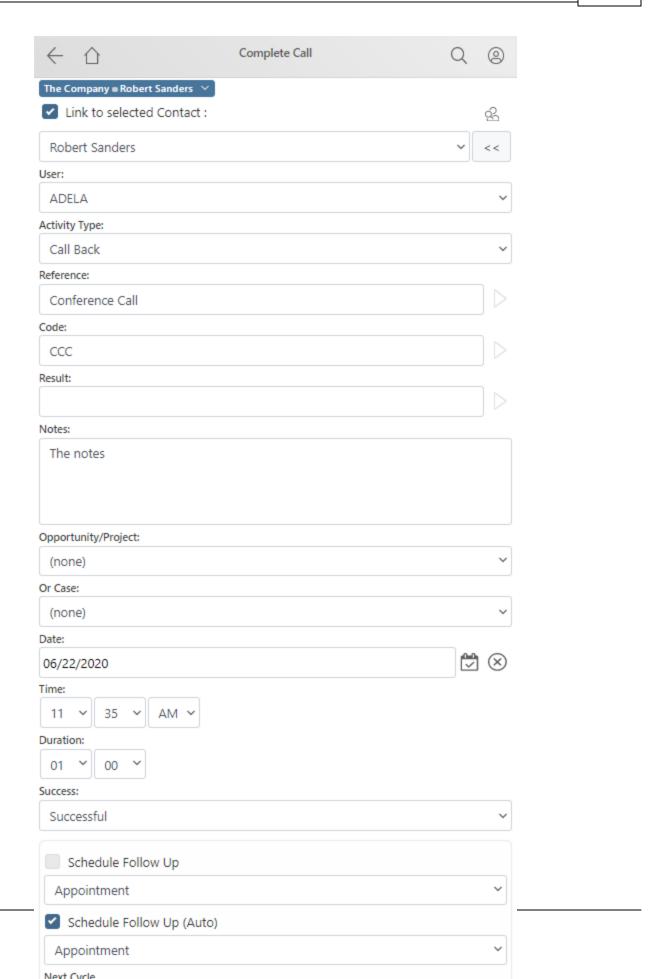
5.8.2   Completing Pending Activities

Pending activities can be completed within wMobile. Activities might be accessed from the Contact record LINKED tab, from the Calendar, from Lookup Pending Activity on the wMobile home menu, or the Dashboard.

To complete an activity, tap the **Complete** link when viewing activities displayed on a list page.

This is an example of a page that would be displayed to complete a pending call. The drop-down lists and text boxes are clearly labeled and self-explanatory. After making the necessary modifications to the activity being completed, tap the **Save** link to create the history record in the database.

Save: Save the completed activity to the database.

Cancel: Returns you to the prior page without saving any changes made.

Home: Returns you to the Home Menu.
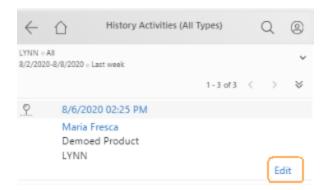
When an activity is completed, the pending activity record is removed and a history record is created in its place to serve as an audit trail of your past activities. This is a great place to store all of your history notes for future reference. Record all the results of the activity that you are completing.

 NOTE: Other activities are completed in the same manner although the screen contents may appear slightly different depending on the type of activity being edited.
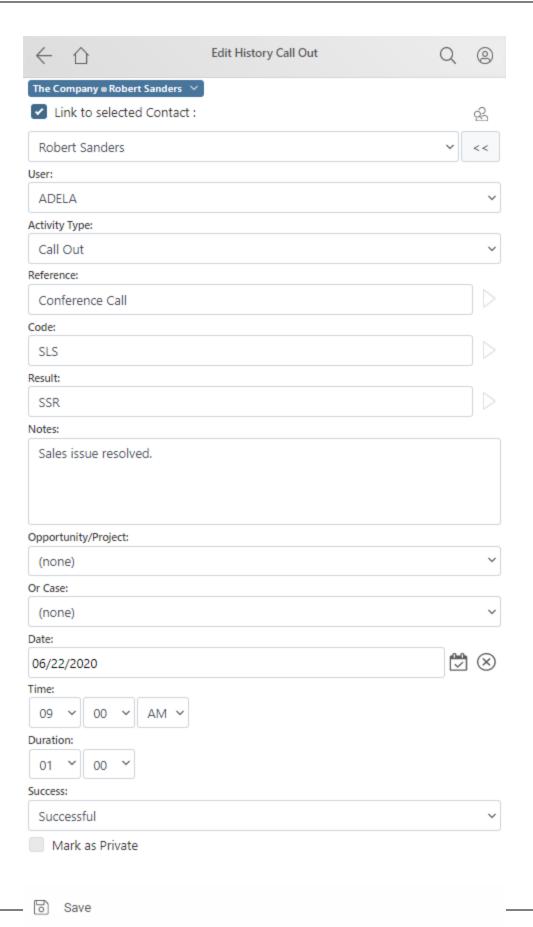
5.8.3   Editing History Activities

History activities can be edited within wMobile. This is helpful when more detail needs to be added to an existing history record for future reference. Activities might be accessed from the Contact record LINKED tab, from the Calendar, from Lookup History Activity on the wMobile home menu, or the Dashboard.

Access to edit a history activity is made by tapping the **Edit** link when viewing history activities displayed on a list screen.

This is an example of a history Call on the editing page. The drop-down lists and text boxes are clearly labeled and self-explanatory. After making the necessary modifications to the activity being edited, select the **Save** link to save the changes to the database.

← ⌂   Edit History Call Out   🔍 ⊚

The Company ● Robert Sanders ⌄

☑ Link to selected Contact :   👥

| Robert Sanders ⌄ | << |

User:

| ADELA ⌄ |

Activity Type:

| Call Out ⌄ |

Reference:

| Conference Call | ▷ |

Code:

| SLS | ▷ |

Result:

| SSR | ▷ |

Notes:

| Sales issue resolved. |

Opportunity/Project:

| (none) ⌄ |

Or Case:

| (none) ⌄ |

Date:

| 06/22/2020 | 📅 ⊗ |

Time:

| 09 ⌄ | 00 ⌄ | AM ⌄ |

Duration:

| 01 ⌄ | 00 ⌄ |

Success:

| Successful ⌄ |

☐ Mark as Private

💾 Save

⊗ Cancel

Save: Save the completed activity changes to the database.

Cancel: Returns you to the prior page without saving any changes made.
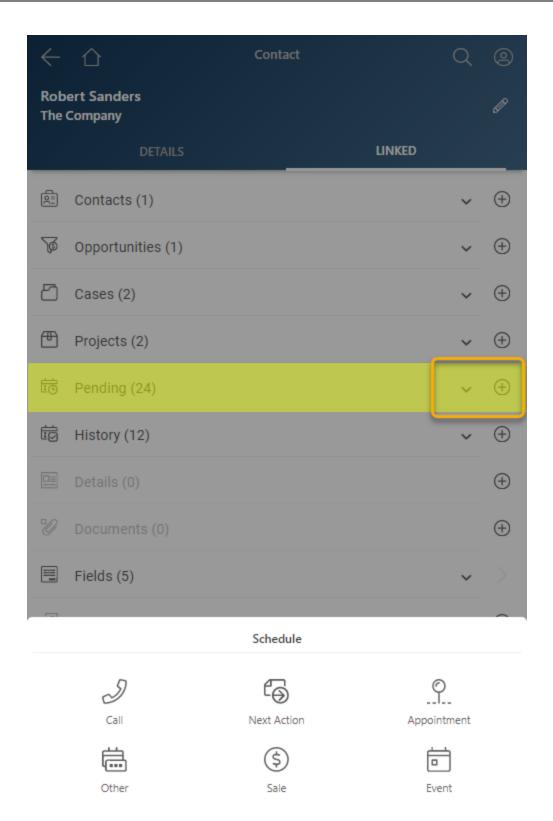
Home: Returns you to the [Home Menu](#).

📄 **NOTE**: Other history activities are edited in the same manner although the screen contents may appear slightly different depending on the type of activity being edited.

5.8.4   Recurring Activities (Phone)

Creating a Recurring Activity in wMobile Phone
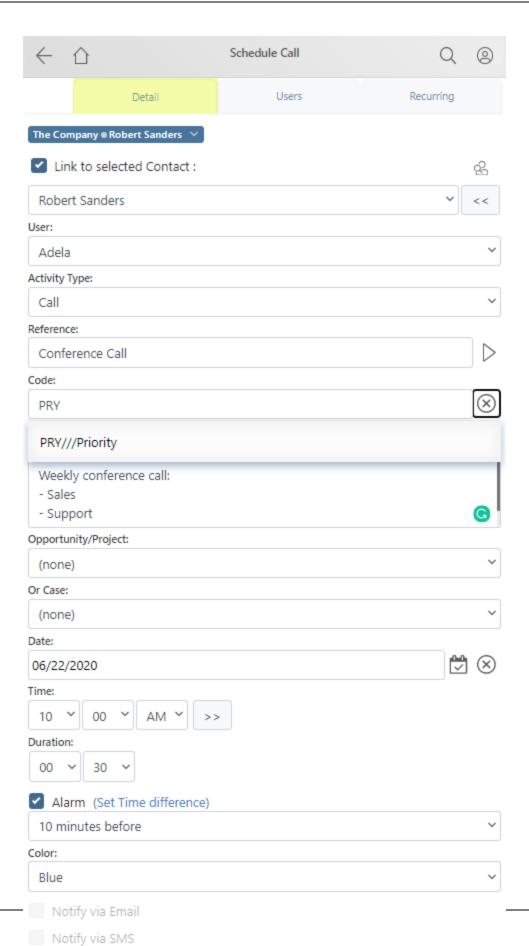
To start, find/select a contact to create a recurring activity for and make that contact visible on the **Contact Detail** page, **LINKED** tab.

From **LINKED** tab, **Pending**, tap on the "**+**" button and then select **Call** from the opened **'Schedule'** menu.

The **Schedule Call** page will open. Note there are 3 tabs that can be configured: Detail, Users, and Recurring.

Here is a screenshot of the **Detail** tab already populated for this example:

The call's **Reference** value is "Conference Call" and the calls are scheduled to start on at 10:00 AM with a duration of 30 minutes. Notes were added to remind us of the meeting's topics and a Code (PRY) was set. (NOTE: PRY = Priority; you may use any code you wish from your system.)
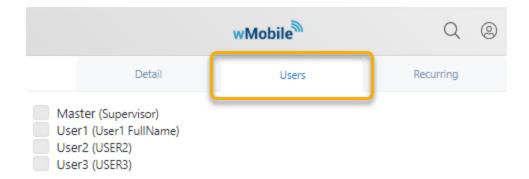
Other Options to Set:
You may optionally (as shown on the page above) link the activity to an Opportunity or a Case, set an Alarm, Notify via Email, Auto-generate RSVP, Mark as Private, and set a Color value. The Primary User (ADELA in this example) may be changed if you are scheduling this for a user other than yourself. The Users tab allows you to set the activity for multiple users. In this example, we left this set only for ADELA as the Primary User.

The Users Tab

When creating recurring activities, more than one user can be added to the activity. This is accomplished using the **Users** tab.
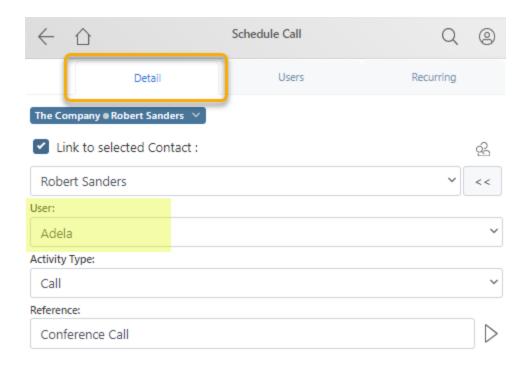
Here is a screenshot of the **Users** tab in wMobile Phone:
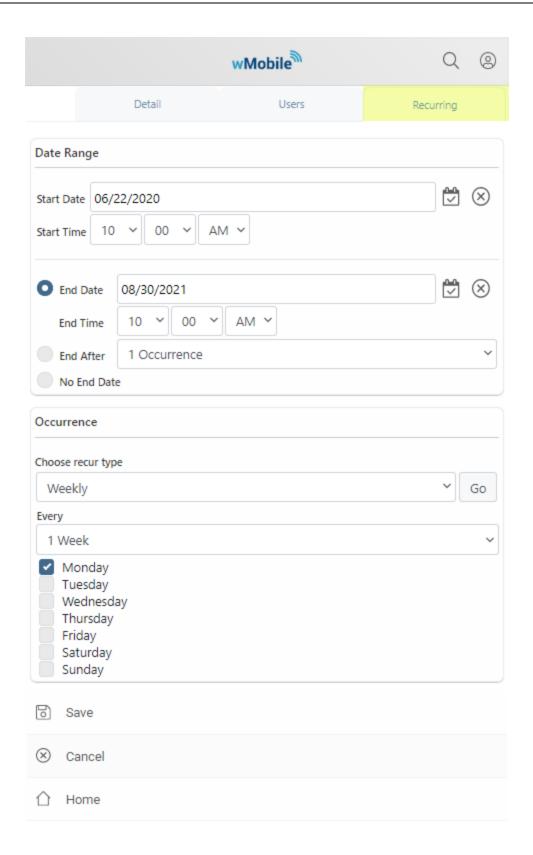
NOTE: The (primary) **User** linked to the activity is set on the **Detail** tab.

Other users can be added to the activity by placing a tick in the checkbox next to their username in the list presented on the Users tab.

Here is a screenshot of the **Recurring** tab already populated for this example. We want to meet "Mondays" of every week starting on 6/22/2020, through the end of August 2021.
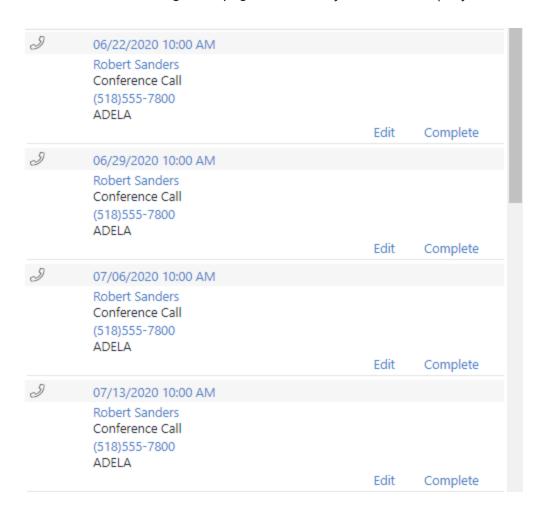
Above, the page shows how to setup the calls to be scheduled:
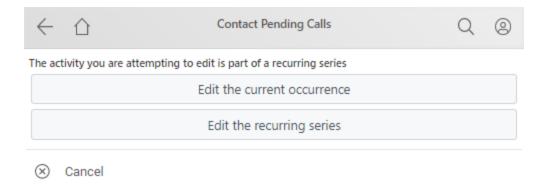
- Start Date = 6/22/2020; End Date = 8/30/2021 (totaling a year's worth)

- Start time = 10:00 AM (the time to meet; the Duration was set previously)

- Occurs = Weekly

- Every = 1 Week (user for every week; no skipping in this example)

- Monday (we select the day of the week)

Finally, to create the series of recurring calls, tap the **Save** link.

On the **Contact Pending Calls** page, we see they were created (only three shown here):

When the **Edit** link for one of these recurring activities is selected, wMobile Phone will display this page:

The user has the option to edit either the "Edit the current occurrence" or the "Edit the recurring series" of activities by selecting one of the buttons on the page presented (see above). Note: The "Edit the current occurrence" is activity that was selected from the **Contact Pending Calls** page. After tapping a button, the **Edit Pending Call** page opens where edits to the activity can be made and saved (or activities of the entire series).

⚠ **IMPORTANT: Editing Recurring Activities (Special Notes for Behavior Based on GoldMine Versions)**

The user has the option to edit either the "Edit the current occurrence" or the "Edit the recurring series" of activities. However, please note that users running different versions of GoldMine will have different capabilities:

GoldMine 9.x and higher:
Users running GoldMine 9.x and higher will be able to edit the recurring details (i.e., the start/end dates/times) as well as the activity details such as reference, activity code and notes.

GoldMine 8.x, 7.x, and 6.x:
Users running GoldMine 8.x, 7.x, and 6.x will only be able to edit the activity details such as reference, activity code and notes. The recurring tab will not be displayed for editing the recurring details (i.e., the start/end dates/times).

5.9   Working with Email

Use wMobile's email capabilities to send and receive email from one or more email accounts. Configure these accounts to link and file email messages into GoldMine. Use email templates and more.
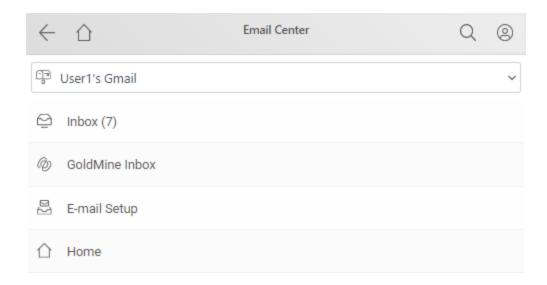
5.9.1   Email Center

From the [Home Menu](#), select the **Email Center** link to take you to the **Email Center** page.

> 🗋 **NOTE**: The Email Center link on the Home Menu does not display by default. This needs to be configured in <u>Email Setup</u> preferences (see: **Show E-mail Center in Home Page**).
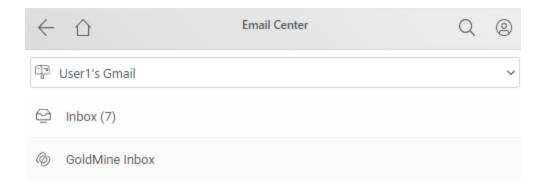
With one or more email accounts configured, the drop-down will contain the names of those accounts that have already been configured. Use the **E-mail Setup** selection to access the <u>Email Accounts Page</u> for adding new accounts or editing existing accounts.

If you have not configured at least one email account, tap on **E-mail Setup** link to display the <u>Email Accounts Page</u> where the <u>New Account</u> link can be used to setup an email account.

Here is the **Email Center** page showing an account that has been configured and selected. Below the drop-down are links to open this account's Email Account Inbox or the logged in GoldMine user's GoldMine Inbox. If you have more than one email account configured and you want to view email for a different account, select the email account name from the drop-down to view it.
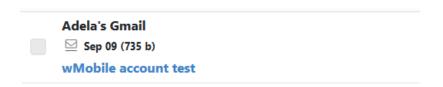
The **Inbox (n)** link opens the selected email account to view and work with email. In the parenthesis, the "n" value represents the number of unread email messages in the account's Inbox.

5.9.2   Email Inbox
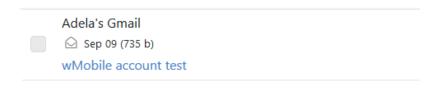
The **Email Inbox** displays email that is on your IMAP or POP3 mail server. This is like the Online Inbox in GoldMine where we see emails that have not yet been retrieved into GoldMine.

Below, you will find a screenshot of an **Email Inbox** page and the descriptions for each item found within it. For the Email Inbox(es) and for the GoldMine Email Inbox, there are some specific similarities in the way email is displayed. Those similarities are explained here:

Unread Email: Unread email is displayed with the sender's name in **bold** type font. If the sender's name is not available, the sender's email address will be displayed.

Read Email: Read email is displayed in light blue and the sender's name in normal font. If the sender's name is not available, the sender's email address will be displayed.

Adela's Gmail
☐ ✉ Sep 09 (735 b)
wMobile account test

Envelope Icon: ✉ = Unread email; ✉ = Read email
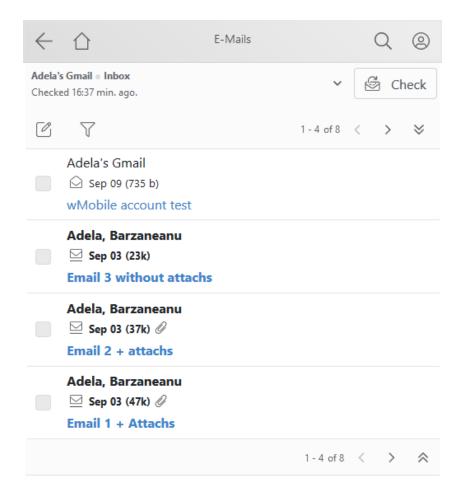
Date / Time: The Date/Time value displayed in the list is extracted from email message's date header. The value represents the date/time when the email was sent. If a date is not displayed, the email was sent on the current day.

Size / Attachment Status (displayed within parentheses): This displays the size of the email message including any attachment(s). If the paper clip icon is present (📎) the email has file(s) attached.

Linked Status: If the word "**Linked**" appears after the **Size / Attachment Status** values then the email message was linked to a contact in GoldMine.

Filed Status: If the word "**Filed**" appears after the **Size / Attachment or Filed Status** values then the email has been filed. wMobile has an option to **Auto File received E-mails** based on matching email address.

Email Subject Line: This is the email's subject line and is also a link to open the email to be read. Tap this link to open the email for reading and further processing. The checkbox to the left of the subject line is used to select the email message for further actions like filing, marking as read or unread, deleting, etc.
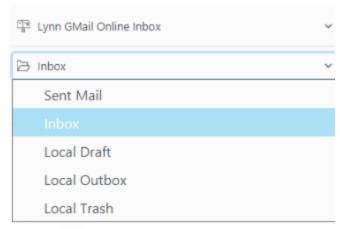
Account: At any time, you may change the email account you want to view by tapping on the account at the top of the page and selecting a different account from the drop down list.

Checked hh:mm:ss Hours Ago: The value displayed (hh:mm:ss) is the elapsed time since the email server was last checked for new email. The time is displayed in hours (hh), minutes (mm), and seconds (ss). NOTE: The duration of time in between wMobile checking the email server for new email is set in the email account configuration. Example: Checked 01:15:17 Hours Ago.

Check: Tapping the **Check** link immediately forces the email server to be checked for new incoming email messages.

Folder: Choices include the Inbox, Sent Mail, Local Draft, Local Outbox and Local Trash folders.

Select: ✎ Use this icon to display email by status. The select options are: **All, None, Read** and **Unread**.

View: ▽ Use the filter icon to filter emails by status. Tap one of the following choices available:

- **All**: Display all email messages (read and unread).
- **Read**: Display only email messages marked as read.
- **Unread**: Display only email messages marked as unread.
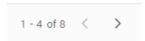
Emails : (**X-Y of Z**): Based on the choice of filtration selected in the **View** option, the email message count is displayed on this line as follows:

- **X**: Beginning number on the current page.
- **Y**: Ending number on the current page.
- **Z**: Total email messages.

Example: Emails : (1 - 4 of 8)
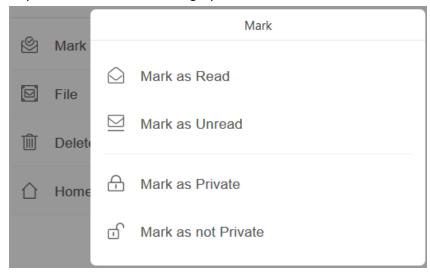
📄 **NOTE**: If there are more email messages than can be displayed on a single page, navigation links and buttons will be available to give you access to the next (or previous) page of messages. Here are the two types:

Example of the "next" and "prior" page links.

Single or multiple emails can be selected or checkmarked for processing using the options at the bottom of the page: Mark, File, and Delete.

Tap on **Mark** to see marking options.
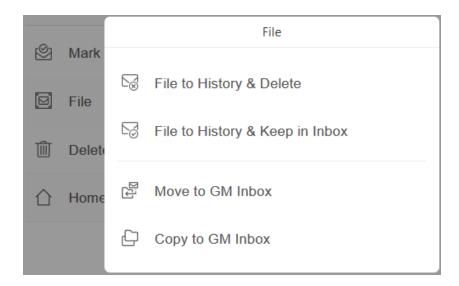
Mark as Read: This link will cause the selected email message(s) to be marked as if they have been read.

Mark as Unread: This link will cause the selected email message(s) to be marked as if they have not been read.

Mark Emails Private: This option will mark the selected email message(s) private so other GoldMine and wMobile users would not be able to read the email text. (**NOTE**: A master-level user in GoldMine can still see emails marked as private.)

Mark Emails Not Private: This option will make the selected email message(s) public. Other GoldMine and wMobile users would be able to see and read the emails based on their record access.

Tap on **File** to see filing options.
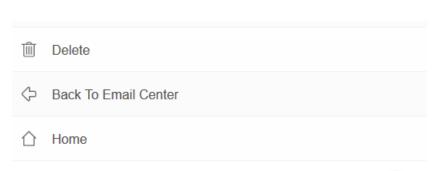
File to History & Delete: This option will store the email message(s) in GoldMine and create a GoldMine history record. The email will be deleted from the wMobile Inbox.

File to History & Keep in Inbox: This option will store the email message(s) in GoldMine and create a GoldMine history record. The email will remain in the wMobile Inbox.

Move to GM Inbox: Tapping Move to GM Inbox will store the email message(s) in GoldMine and create a GoldMine pending activity record. The email will be moved to the GoldMine Inbox, and it will be removed from the wMobile online Inbox.

Copy to GM Inbox: Tapping Copy to GM Inbox will store the email message(s) in GoldMine and create a GoldMine pending activity record. A copy of the email will be placed in the GoldMine Inbox. The email will remain in the wMobile online Inbox.

Delete: Use this link to delete the selected email message(s).

Back To Email Center: Takes user back to Email Center page.
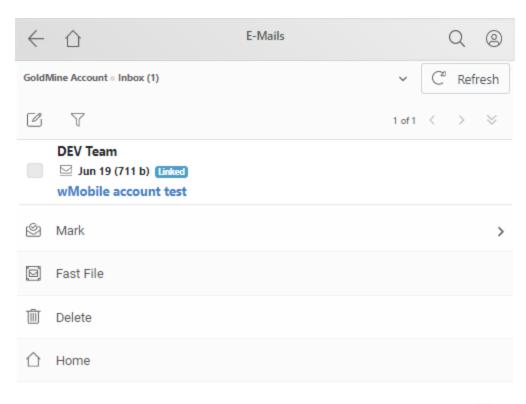
Home: Returns you to the Home Menu.

"+" button: This button is used to begin a new outgoing email message.

5.9.3   GoldMine Inbox
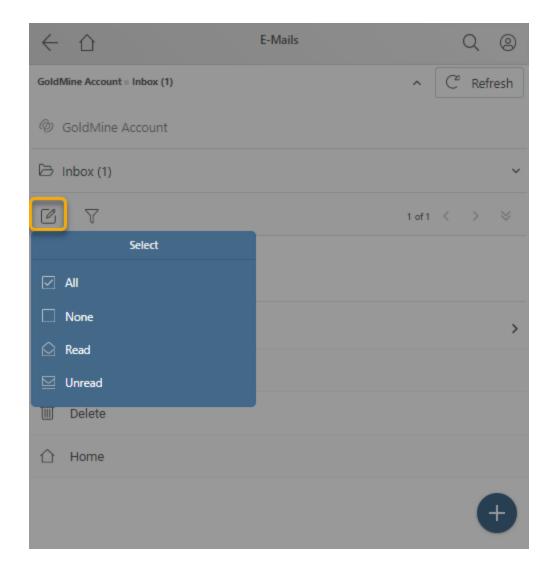
The **GoldMine Inbox** contains emails that have been previously downloaded and retrieved into GoldMine. The list of email messages displayed are from "all" of the folders created in GoldMine as child-folders in the main Inbox folder.

The **GoldMine Inbox** shares many of the same attributes as the Email Inbox with regard to the user interface and operation. Please refer to the Email Inbox topic for details.
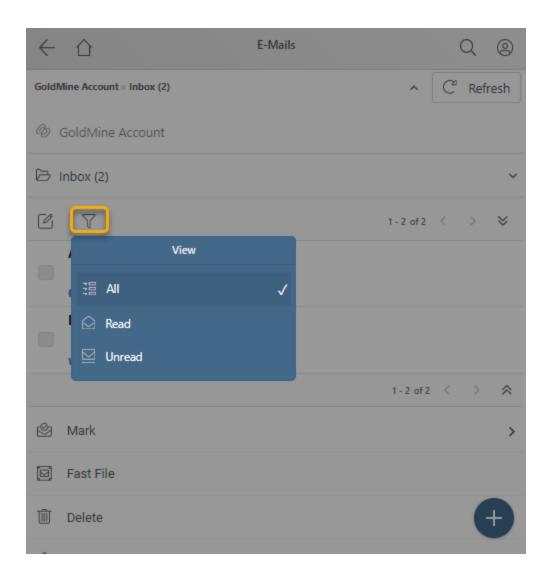
Select: The **Select** options allow selecting email messages based on read status. Options include All, None, Read, and Unread.

View: The **View** options allow filtering of the displayed email messages. Tap one of the following choices available to filter the display:

- **All**: Display all email messages (read and unread). (This is the default.)
- **Read**: Display only email messages marked as read.
- **Unread**: Display only email messages marked as unread.
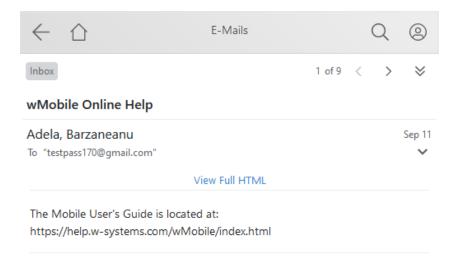
5.9.4   Opening Email

To open an email message, tap on the subject line of the message you want to read from the Email Inbox or from the GoldMine Inbox (the email subject lines are displayed as links).

This example shows the email body displayed using Simple HTML (i.e., plain text):

Parts of the email message record shown above:

Email Count: The email count is displayed on the top and the bottom of the email message. This displays the number of the email message out of the total number of email messages. In this example, this is the first email of 9.

Navigation buttons (< and >): Use the navigation buttons to move to the previous [<] or next [>] message.

E-mail subject: Just below the e-mail count is e-mail's *subject line* text.
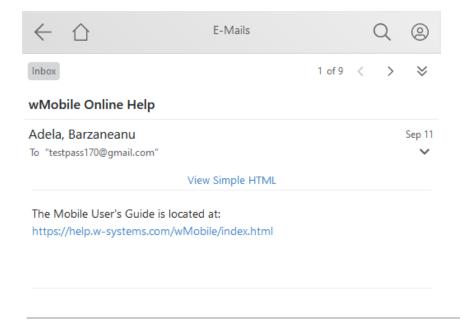
E-mail Header: An *email header* summary is displayed including **From**, **To**, and **Date** information after tapping on the down-arrow (⌄) button.

Attachments: This link will display if the email has one or more attachments. Selecting this link will open a page containing links to the attached files. From this page the file(s) can be opened for viewing if your device supports opening the type of file you wish to view.
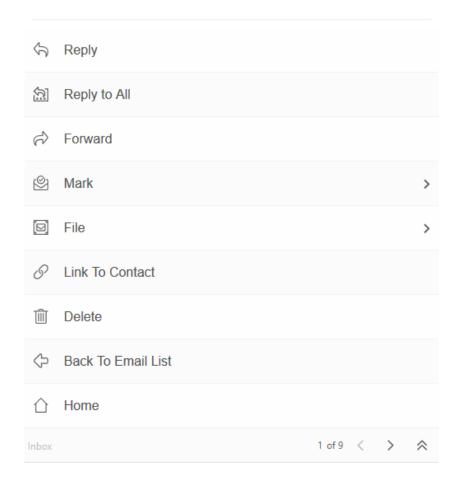
View Full HTML: By default, messages are displayed using simple text for ease of viewing on a handheld device screen, speed in displaying, and to minimize scrolling. Tap on **View Full HTML** to view the email using full HTML. (See the example below displayed in full HTML.) The default can be changed in the email settings (see the **Default E-mail view** setting).

Message body: This is the text of the e-mail message.

This example shows the email body displayed using Full HTML:
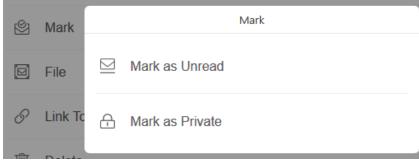
At the bottom of the email page are many links to provide functions for processing the email that is being viewed:

Reply: Reply to only the sender.

Reply to All: Reply to all of the recipients.
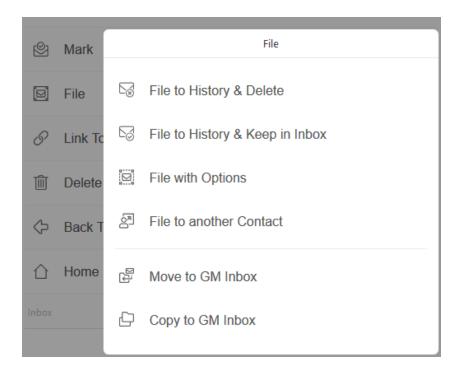
Forward: Forwards a message; you will add the recipient(s) to send to.

Tap on **Mark** record to open the **Mark**'s options:

Mark as Unread: This link will cause the email message to be marked as if it has not been read.

Mark as Private: This option will mark the selected email message private so other GoldMine and wMobile users would not be able to read the email text. (**NOTE**: A master-level user in GoldMine can still see emails marked as private.)

Tap on **File** to open the File's options:

File to History & Delete: This option will store the email message in GoldMine and create a GoldMine history record. The email will be deleted from the wMobile Inbox and from the server after filing it.

File to History & Keep in Inbox: This option will store the email message in GoldMine and create a GoldMine pending activity record. The email will remain in the wMobile Inbox.

File with Options: This option will store the email message in GoldMine and create a GoldMine pending activity record. The email will remain in the wMobile Inbox.

File to another Contact: Use this to link the current e-mail message to another existing or new contact. The Link to Contact page will open.

Move to GM Inbox: Tapping **Move to GM Inbox** will store the email message in GoldMine and create a GoldMine pending activity record. The email will be moved to the GoldMine Inbox, and it will be removed from the wMobile online Inbox.

Copy to GM Inbox: Tapping **Copy to GM Inbox** will store the email message in GoldMine and create a GoldMine pending activity record. A copy of the email will be placed in the GoldMine Inbox. The email will remain in the wMobile online Inbox.

Link to Contact (or) **Go to Contact**: The link that displays here depends on whether the email message being viewed is linked to a GoldMine contact or not.
- **Go to Contact**: Appears only when the email message is linked to a GoldMine contact. Use this link to open the associated contact's detail page.
- **Link to Contact**: Appears only when the email message is not linked to a GoldMine contact. Use this to link the email message to an existing contact or to create a new contact and then link the message to the newly created contact. The Link to Contact page will open for performing these actions.

Delete: Use this link to delete the email message.

Back to E-mail List: Return you back to the list of email messages.

Home: Returns you to the Home Menu.

5.9.5   Meeting Requests (Phone)
Meeting requests are supported in both wMobile Phone and wMobile Desktop versions.

If an incoming email contains a meeting request, a meeting response or a canceled meeting, the email will be parsed and the body of the email will be created using information extracted from the meeting part.
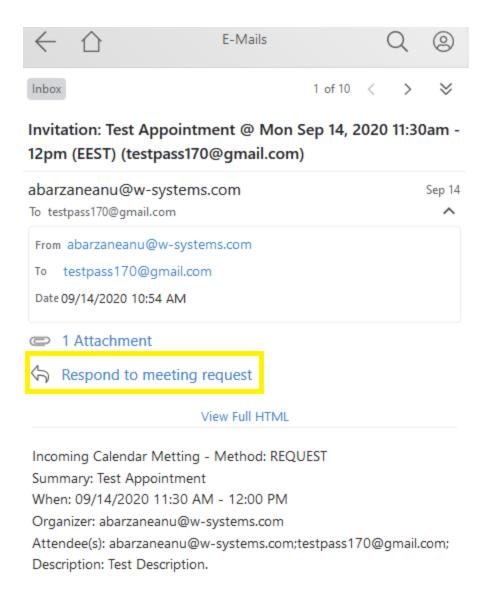
Accepting Meeting Requests
Meeting Cancellations
Using Meeting Requests with Office 365
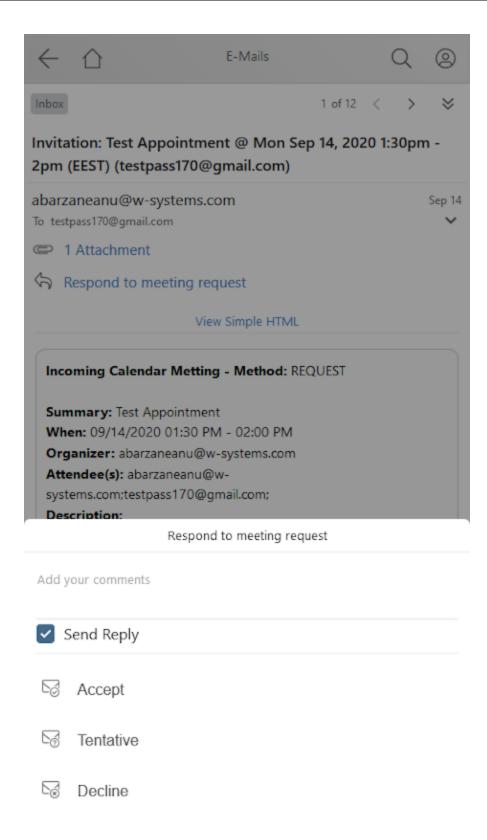
5.9.5.1   Accepting Meeting Requests (Phone)

When opening an email that contains a meeting request, a new link will be added to the email header: '**Respond to meeting request**'.

When tapping on that link, a prompt with meeting response options will be visible (see picture below). As in the Desktop version, three new buttons will be available ('**Accept**,' '**Tentative**,' '**Decline**'), a text box where the user can insert his comments and a checkbox to choose if he wants to send a reply email to the meeting organizer to notify him whether or not he will be attending. The response will be sent when the user presses one of the three options.

When a user responds to a meeting request the following actions can happen:

1. A meeting response email would be created.

If the 'Send reply' option is checked, a meeting reply email would be created and sent to the meeting organizer to notify him whether or not the user will be attending.

2. An appointment would be inserted in the user's Calendar
If the user presses 'Accept' or 'Tentative', a new appointment is created and inserted in his calendar.
If the user presses 'Decline', no appointment is created.
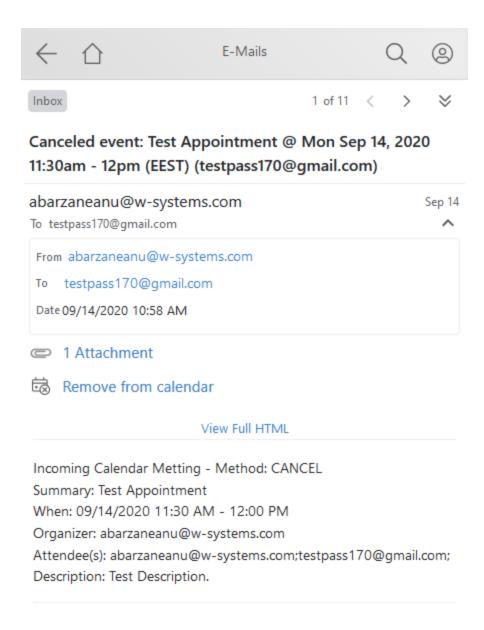
3. After the user responds, the email is deleted and filed to GoldMine. This action happens regardless of the response.

5.9.5.2   Meeting Cancellations (Phone)
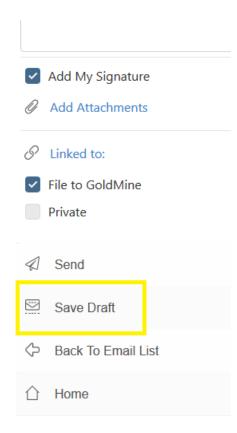
When opening an email that contains a canceled meeting, a new button will be added to the email action options: '**Remove from calendar**.'

When tapping on that option, the pending activity linked to that email is deleted from calendar and the email is Filed to GoldMine.
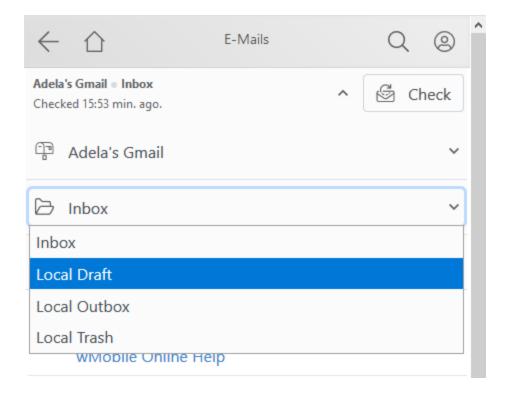
5.9.6   Working with Email Drafts
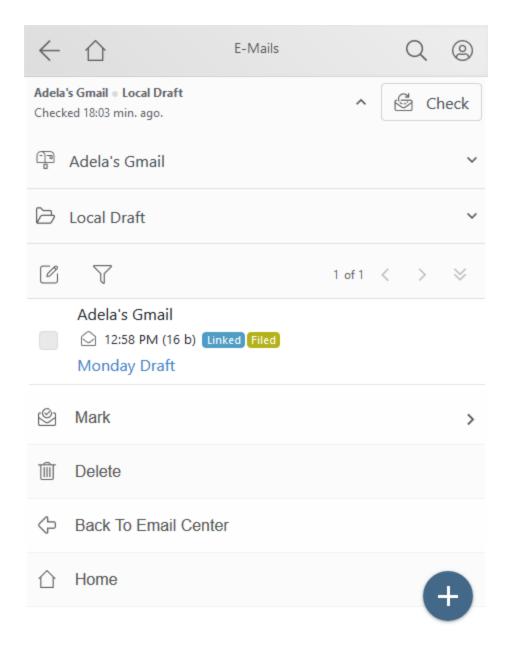
If you have started composing an email but are not ready to send it, you have the option of saving it as a draft. At the bottom of the page, select **Save Draft**.
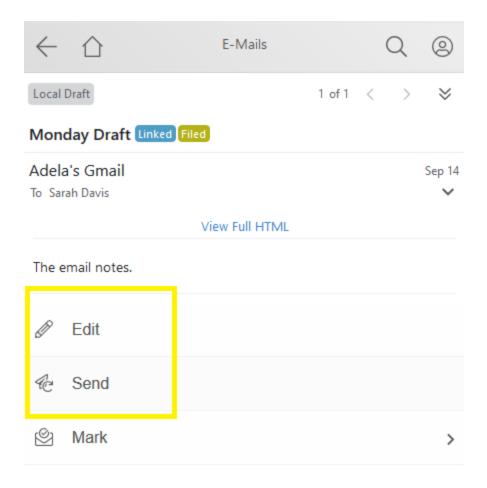
The draft will be saved and closed. To access the draft at a later time, it can be found in the **Local Draft** folder. From the Email Center's **Inbox**, select the **Local Draft** from the **Folder** drop-down list.
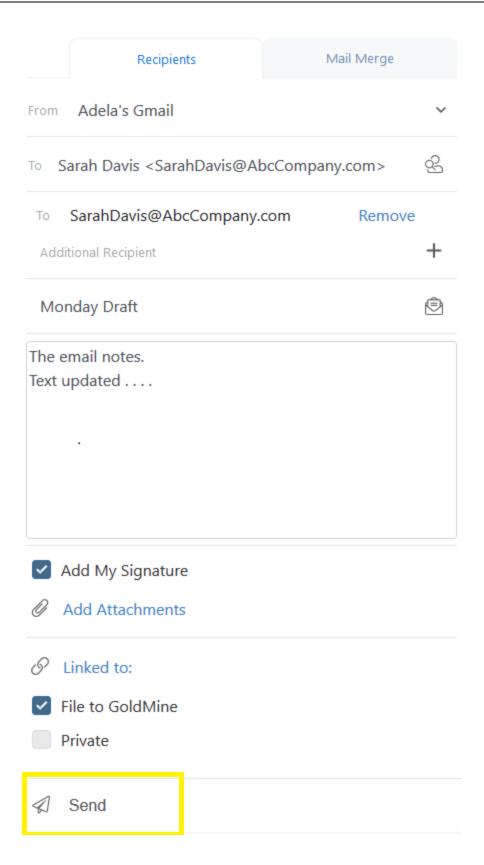
Any drafts that were saved will appear in the list.

Tap on the draft email's subject line to open it. The email can now be edited or sent using the options **Edit** or **Send** respectively.

If the draft is edited, there will be an option to **Send** the email after editing.

Recipients | Mail Merge

From   Adela's Gmail   ⌄

To   Sarah Davis <SarahDavis@AbcCompany.com>   👥

To   SarahDavis@AbcCompany.com   Remove

Additional Recipient   +

Monday Draft   📨

The email notes.
Text updated . . . .

                    .

☑ Add My Signature

📎 Add Attachments

🔗 Linked to:

☑ File to GoldMine

☐ Private

◁ Send
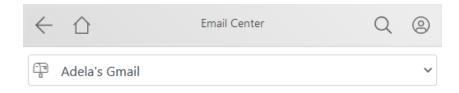
5.9.7   Sending Email
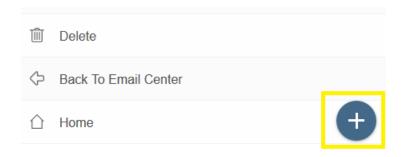
New email messages can be created from the Email Center's Inbox as well as when viewing contact information. From the Email Center, the message may be sent to an individual, a filtered set or group of contacts, and optionally allow the inclusion of additional contacts.

Select an email account to send your email from:
At the top of the page is a drop-down to allow you to change, if desired, the email account you would like to send the email from. To change this, select the email account from the drop-down list.

To send a new outgoing email message from the Email Center, Select an email account, tap the "**+**" button from the bottom of the Email Inbox page. This will open the **Send Mail** page.
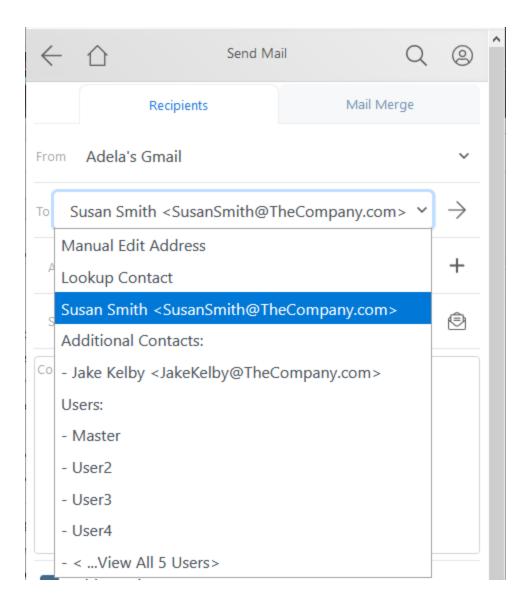
> 🗒 **NOTE**: The "**From account**" drop-down list will initially display the default email account as specified when configuring email accounts.

Selecting the email recipients:
There are different methods for selecting the recipients for an email message and these methods may be combined for each email message to give you flexibility. The methods include: manually entering an address, searching for and selecting an existing contact's email address, using a filtered set of contacts, using a contact group, or selecting a GoldMine user.
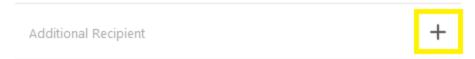
To select a recipient, use the drop-down to the right of the **TO** label. Select an option on the list and tap **Select**.
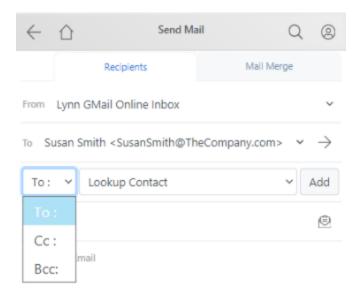
- **Manual Edit Address**: This option will allow you to manually type an email address into the **TO** field.
- **Lookup Contact**: Opens the Lookup Contact page. Enter a search value and tap the **Search** button. After the results are displayed, tap on the desired email address link to use it as a recipient.
- **Additional Contacts**: Lists the additional contact email addresses to select from.
- **Users**: Below the "**Users:**" header in the drop-down list is a list of the individual GoldMine users available to be selected as a recipient. Each of these choices is prefixed with a hyphen (-).

Tap on the "**+**" sign to the right of the Additional Recipient to add additional recipients.
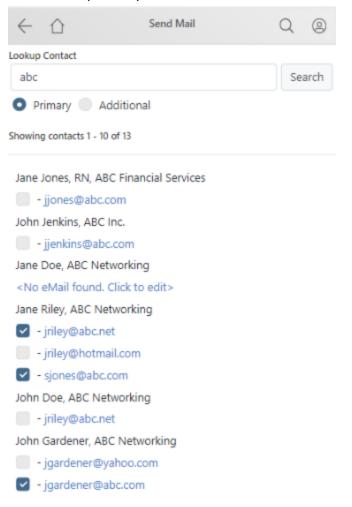
Use the drop-down list to select : **To** (to):, **Cc** (carbon copy), or **Bcc** (blind carbon copy) recipients.

The same choices will be presented: **Manual Edit Addresses**, **Lookup Contact**, **Additional Contacts** or **Users**. See also: Lookup Contact.

When using Lookup Contact, use the checkboxes to the left of the email address to to select multiple recipients.
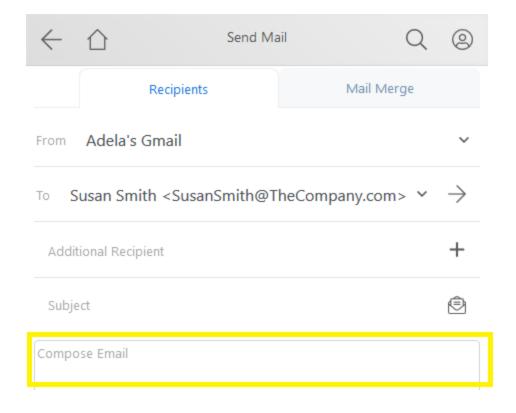
> NOTE: Tap the **Remove** link next to any recipients already selected if you wish to remove them from receiving the email.

Subject: Enter the subject of the email message in this textbox.

- To use an email template tap the envelope " " button next to the **Subject** field. Please see the section on Email templates for details.

Email message body is entered in the field below as shown:

☑ **Add My Signature**: Adds the user's signature to the email message.

Add Attachments: This link will open a page where you can upload files to attach to email.

Opportunity/Project (**Regarding**): This option will only appear if an opportunity or project exists on the contact to whom you are sending the email. Select an opportunity or project from the drop-down to link the email message to. The default is "(none)".
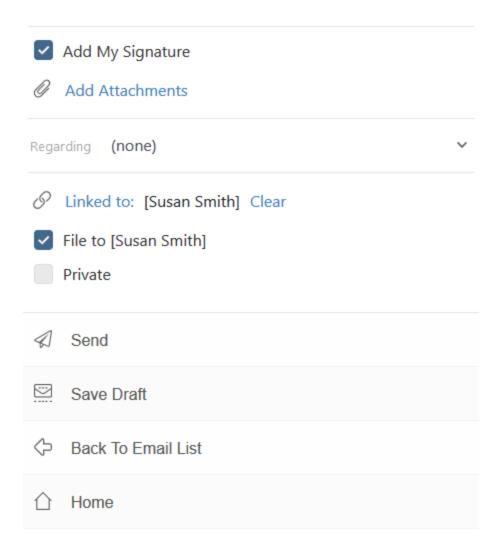
☑ **File to**: When checked, the email will be filed in GoldMine. This is checked by default.

☐ **Private**: Marks a message as private.

Send: Tap the Send button to send the email message. A page will display showing the status of the email sent and links for [Back to Email List](#) and [Home](#).

Save Draft: Use this to save a draft of the email. The email can be edited again and emailed at a later time.

Back To Email List: This link will bring you back to the email list for the current email account you were last viewing.

Home: Returns you to the Home Menu.
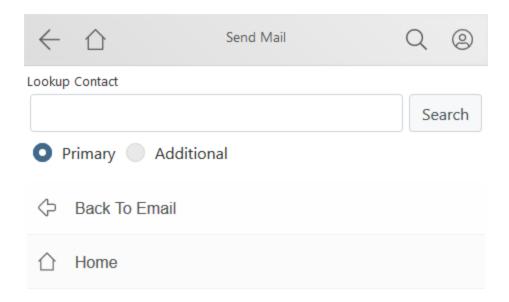
✓ Add My Signature

📎 Add Attachments

Regarding   (none)   ⌄

🔗 Linked to: [Susan Smith] Clear

✓ File to [Susan Smith]

☐ Private

✈ Send

✉ Save Draft

⇦ Back To Email List

⌂ Home

Send: Tap **Send** to send the message.

Back To Email List: Takes user back to the Email List.

Home: Returns you to the Home Menu.

5.9.7.1   **Lookup Contact**
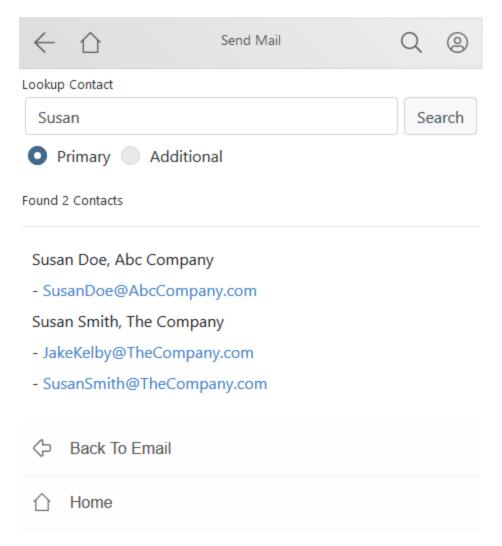
This type of Lookup Contact page appears when searching for email recipients when
sending email. Type in a part of or all of the contact's name or company and tap on
Search.

A list of contacts that meet the criteria will be listed. Tap on the email address hyperlink
to add it as a recipient.

Use **Back To Email** to cancel the search.
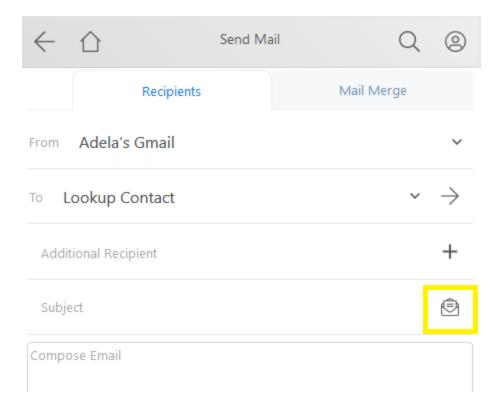
Use **Home** to return to the Home Menu. The email draft will NOT be saved.
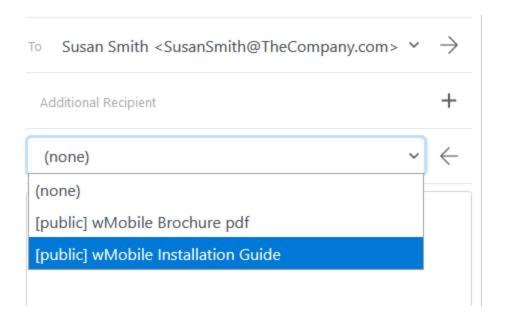
5.9.7.2   Email Templates

wMobile supports the use of email templates. The templates must be created and maintained in the GoldMine application prior to using them in wMobile. The list of email templates added to the drop-down will be those that are owned by the user logged into wMobile and will also include those that are set as "public" in GoldMine. The publicly owned templates will be at the top of the drop-down list and are prefixed with "[public]" (e.g., "[public] wMobile Brochure").

To use a template, tap on the ✉ button next to the **Subject** line field.
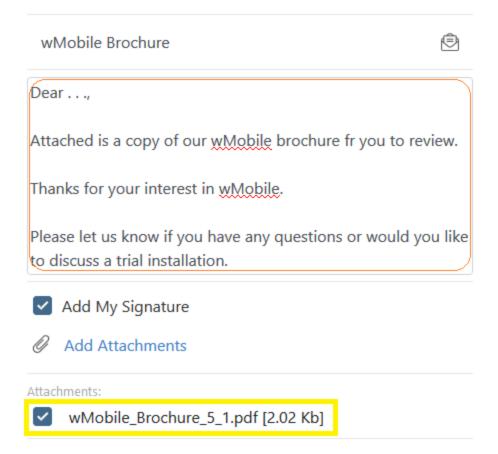
Select a template from the drop-down list.

wMobile will populate the email body textbox with the template's contents. Please note that the data being merged into the template's merge fields from GoldMine (if any exist)
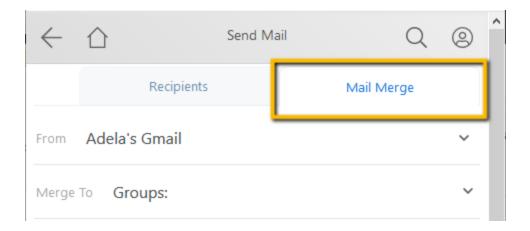
will not appear in the textbox; they will display as they do when creating the template. The data from GoldMine is merged into the template at the time the email is being sent. Also note that in our example, an attachment was also included (this attachment was added to the template when it was created in GoldMine).

Proceed to edit the email and send as usual. Details are in the Sending Email topic.

5.9.7.3   Mail Merge
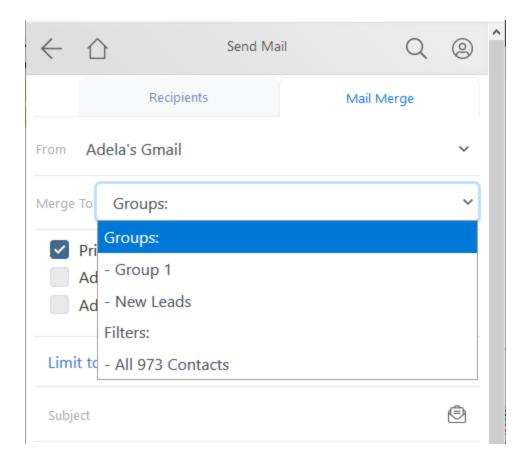
Tap on the **Mail Merge** tab when composing an email to send the message to a list of contacts based on a filter or a group.

After selecting the **Mail Merge** tab, select the group or filter to use from the drop-down:

- **Groups**: Below the "**Groups**:" header in the drop-down list is a list of the individual contact groups available to be selected from. Each of the choices is prefixed with a hyphen (-).
- **Filters**: Below the "**Filters**:" header in the drop-down list is a list of the individual filters available to be selected from. Each of the choices is prefixed with a hyphen (-).

🖺 **NOTE**: The **Groups** and **Filters** need to be created in advance so they are available for use when sending templates. The list of groups and filters added to the drop-down will be those that are owned by the user logged into wMobile and will also include those that are set as "public" in GoldMine.

Tick the checkboxes to send to:

- **Primary Contacts**: Tick to send to primary contact.
- **Additional Contacts**: Tick to send to additional contacts. wMobile can merge both primary and additional contacts.
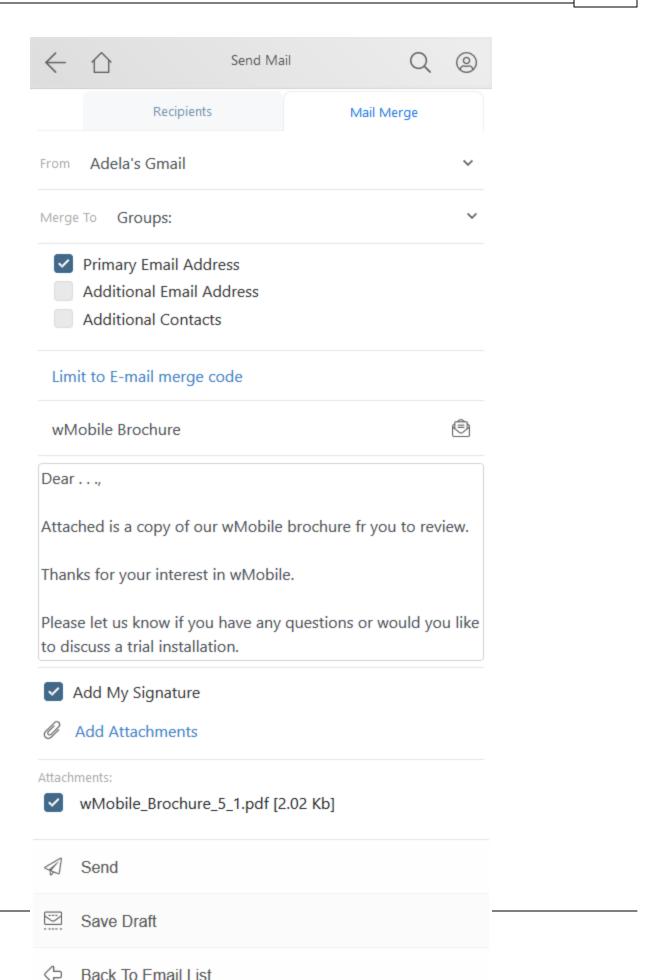
A mail merge can be limited to email addresses that have been marked with an **E-mail merge code**. Select **Clear** to remove the merge codes.

Add in the text or select an email template.

By default the user signature file will be included.

Optionally link the message to an Opportunity or Project.

By default the email will be filed in GoldMine.

Send Mail

Recipients | Mail Merge

From   Adela's Gmail   ⌄

Merge To   Groups: ⌄

☑ Primary Email Address
☐ Additional Email Address
☐ Additional Contacts

Limit to E-mail merge code

wMobile Brochure   ✉

Dear . . .,

Attached is a copy of our wMobile brochure fr you to review.

Thanks for your interest in wMobile.

Please let us know if you have any questions or would you like to discuss a trial installation.

☑ Add My Signature

🔗 Add Attachments

Attachments:

☑ wMobile_Brochure_5_1.pdf [2.02 Kb]

✈ Send

✉ Save Draft

↩ Back To Email List

Send: Tap **Send** to send the message.

Back To Email List: Takes user back to the Email List.

Home: Returns you to the Home Menu.

5.9.8   Link to Contact
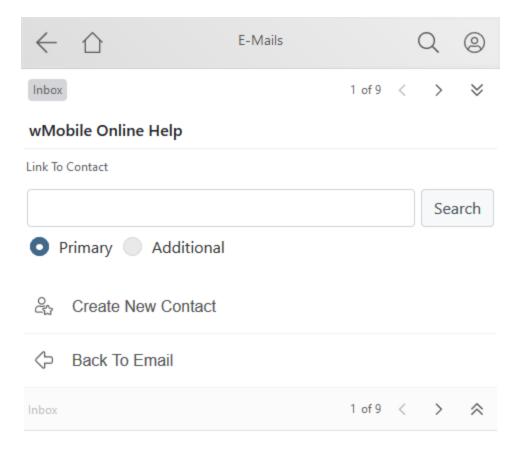
At times an email will be received and there will not be a matching email address or contact in the database to link it to. In the example below, the second email is **Linked** while the unread email is not linked:

On opening an unlinked email, there will be an option to **Link to Contact** in the list of actions at the bottom of the email. Tap this to link the email to a contact:
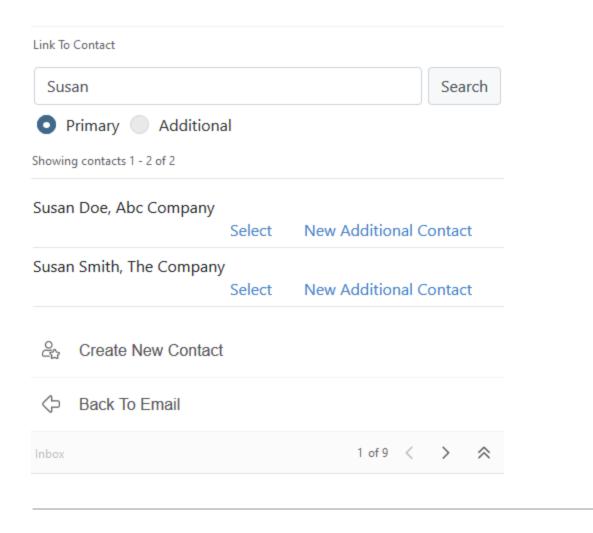
The **Link to Contact** page is displayed for linking an email message to a contact.

There are two choices for linking email to a contact: (1) Create a new contact and link to it; (2) search for an existing contact and link to it.

1. The **Create New Contact** link opens the Add Contact page for creating a new contact that the email will be linked to. On the Add Contact page, enter the appropriate data for the new contact record and tap the **Save** link. Now the email will be linked to the newly created contact record and the email message page will be re-displayed.

2. Use the Lookup Contact textbox and the **Search** button to locate the contact to link to. Enter a search value in the textbox and tap the **Search** button. From the list of contacts found, tap the **Select** link or the **New Additional Contact** link:

    a. The **Select** link will link the email to the selected contact. Then you are returned to the email message page.

    b. The **New Additional Contact** link will open the Add Contact page to allow you to enter a new additional contact and link to it. Then you will be returned to the email message page.
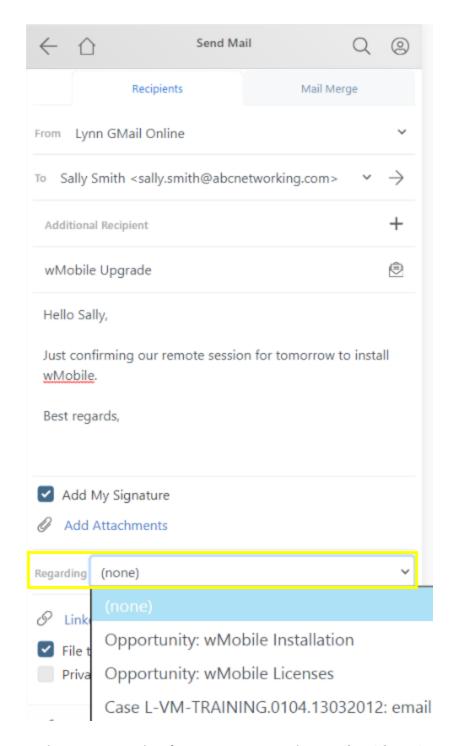
Back to Email: Returns you back to the email message.
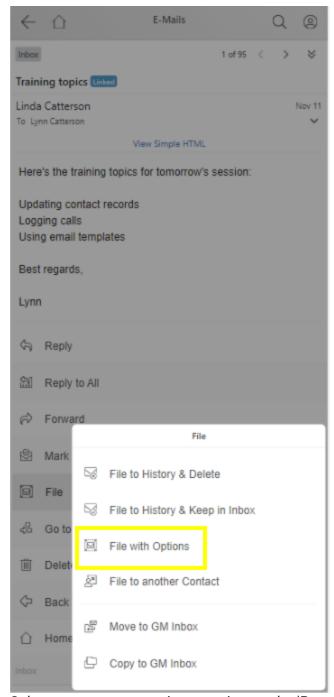
5.9.9   Email Linking

Email can be linked to an existing Opportunity, Project, or Case when composing or filing an email.
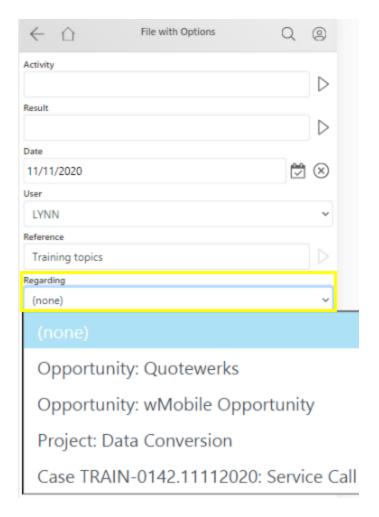
When composing an email, tap on the down arrow to the right of **Regarding** to link the email to a related Opportunity, Project, or Case.

In the next example of an incoming email, use **File with Options** to access the **Regarding** setting.

Select a case, opportunity or project under 'Regarding' as shown below, on incoming or sent email.

> 📓 **NOTE**: The Regarding option will only appear if an opportunity, project, or case is linked to the contact with whom you are corresponding. The default is "(none)".
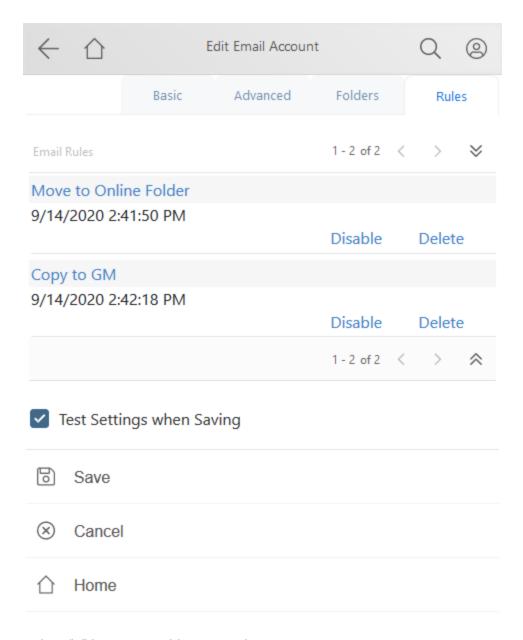
5.9.10   Local Email Rules

Local email rules will allow user to create filters for email handling and specify rules for what should happen to those emails, such as copying email to the GM Inbox or a specific project folder, marking email as Read, or forwarding email.

These are 'Local' email rules in wMobile, to be distinguished from email rules that users might have in GoldMine, Outlook, or other email clients.
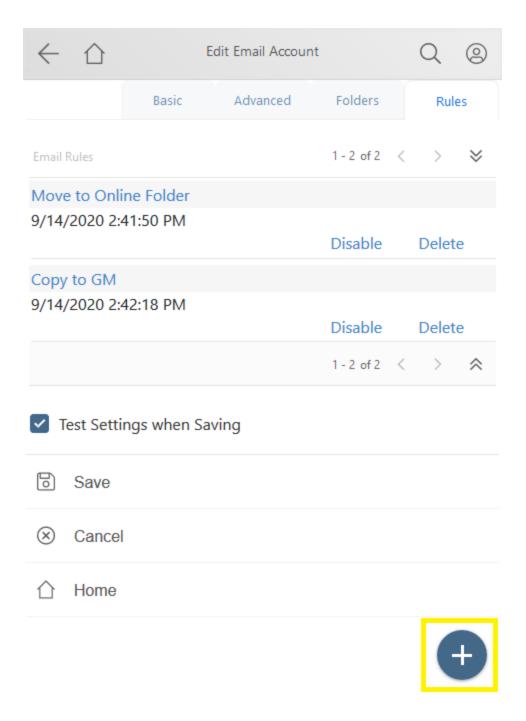
These email rules will allow us to replicate the auto-retrieve and auto-delete email settings from GoldMine to copy email from the Online Inbox to the GoldMine Inbox and then remove it from the Online Inbox.

Email rules can be configured in the Rules tab of Email Account Settings in Preferences. (Additional information on configuring email accounts can be seen in the [Email Settings](#) topic.)
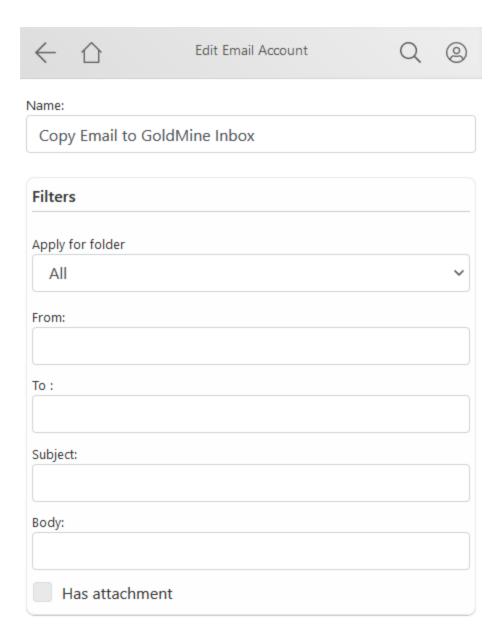
Select "**+**" button to add a new Rule.

The rule condition contains one or more filters, as follows:

Select / Apply for folder
Filter on FROM recipient
Filter on TO recipient
Filter on SUBJECT text
Filter on BODY text

Filter on ATTACHMENTS

Note: Filters on FROM, TO, SUBJECT, BODY are applied with CONTAINS function.

Example:
If the Filter criteria is SUBJECT='invoice'
Then the Incoming email (Subject='Please send invoice details') will evaluated as matching because it CONTAINS 'invoice'.
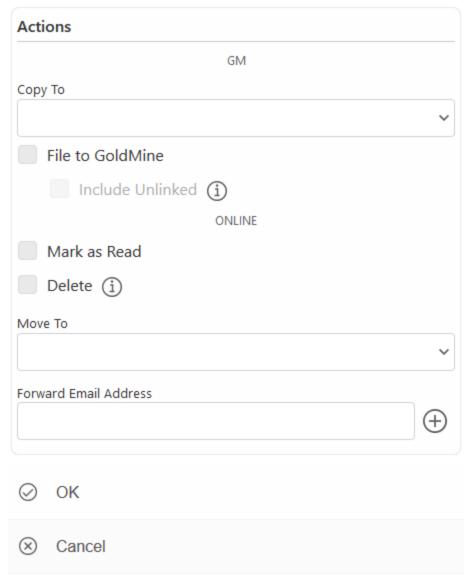
A rule can be set for one folder, or all. Rules will only be applied for folders that are visible in wMobile.

Setting up a rule with no condition (no values in FROM/TO/SUBJECT/BODY/ATTACHMENTS) will result in processing of ALL incoming emails from the selected folder.

The rule action contains one or more sub-actions, as follows:

Copy to GoldMine folder
File to GoldMine
Mark as Read
Delete
Move to Online folder
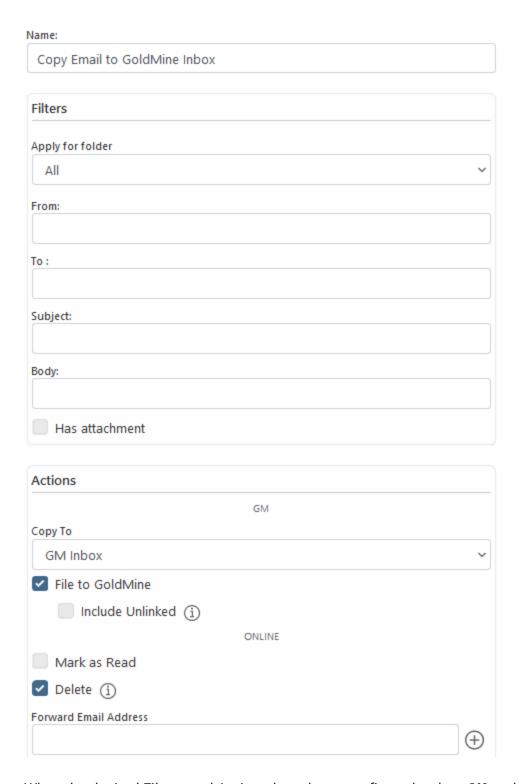
These options provide a range of possibilities for processing email. We can archive email into project folders, delete junk mail based on a specified criteria, forward email to other email address(es).

To emulate GoldMine's auto-retrieve and auto-delete functionality, see the example below to copy email in the Online Inbox into the GoldMine Inbox and remove it from the Online Inbox.

Name:

Copy Email to GoldMine Inbox

Filters

Apply for folder

All

From:

To :

Subject:

Body:

☐ Has attachment

Actions

GM

Copy To

GM Inbox

☑ File to GoldMine

☐ Include Unlinked ⓘ

ONLINE

☐ Mark as Read

☑ Delete ⓘ

Forward Email Address

⊕
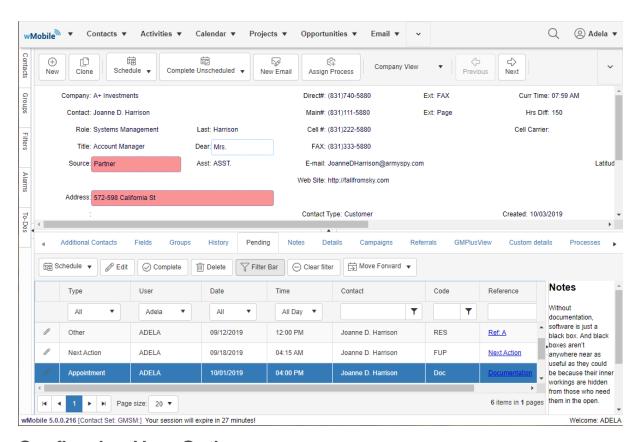
When the desired Filters and Actions have been configured, select **OK** at the bottom of the screen to save the rule.

Multiple rules can be created for different purposes.

6   Desktop Edition

wMobile Desktop allows you to connect to your live GoldMine data when you're on the road or in your home office with a laptop (or desktop) computer, iPad, or tablet by using the device's Internet browser. wMobile Desktop supports any web browser such as Internet Explorer, Firefox, Google Chrome, Safari, etc. Use the web address provided by your wMobile administrator and log into wMobile using your GoldMine username and password. See the topic on setting up a One Click Login for fast and easy access and Configuring User Profiles/Allow Login for your administrator to allow users to log into wMobile.
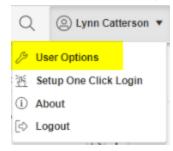
wMobile provides an interface similar to GoldMine, so it's familiar and easy to learn to use.

6.1   Configuring User Options

wMobile Desktop has a number of **User Options** that control how the application works for an individual user. Settings configured by a specific user do not affect other users' settings.

To access the **User Options**, under the user name select **User Options** from the menu bar.

There are nine groupings of settings. Use the links below to access details on each set of options. Some option groups, like Contact, have an arrow ">" in the tree view showing that there are sub-options; tapping the ">" expands the list to select from.

📄 [Display](#)
📄 [Personal](#)
📄 [Regional](#)
📄 [Contact](#)
📄 [GM+ Browser](#)
📄 [Activity](#)
📄 [Session](#)
📄 [Documents](#)
📄 [Email](#)

6.1.1   Display Options

The **User Options** settings control the display and behavior of wMobile Desktop. These settings can be adjusted for the individual user.

The **Display** settings control how wMobile Desktop is displayed on your screen.

Theme: Please see: [Change Themes](#) for details on themes.

Startup Page: When wMobile Desktop is opened, the page that is initially displayed can be set to one of the following: Dashboards, Contact Search, Pending Activities, History Activities, Calendar (Daily, Weekly, or Monthly), Last Visited Contact, Case Manager, Email Center, Opportunity Manager, or the Report Center. Select the option that will be used most often when opening wMobile Desktop.

Show column filters: With this selection checked, the filter bar on Pending, History, and Additional Contact tabs will be displayed by default, as pictured below. The user can show or hide the filter bar using the **Filter Bar** button regardless of the default setting.

> 🗐 **FONT SELECTION NOTE**: Font selections here pertain to general display settings such as activities and opportunities. There are separate settings for the **Contact** screen in [Contact Options](#).

Label Font Name: Select a font for the label text. Options include Arial, Times New Roman, Lucida, Comic Sans MS, and Monospace.

Label Font Color: A color can be selected for the label text from a color palette. The default color is black.

Label Font Size: A font size can be set for the label text ranging from 6 to 13. The default setting is 9.

Label Alignment: This setting controls the alignment of the label text. The options are Left, Right, and Center.

Value Font Name: Select a font for the value text. Options include Arial, Times New Roman, Lucida, Comic Sans MS, and Monospace.

Value Font Color: A color can be selected for the value text from a color palette. The default color is black.

Value Font Size: A font size can be set for the value text ranging from 6 to 13. The default setting is 9.
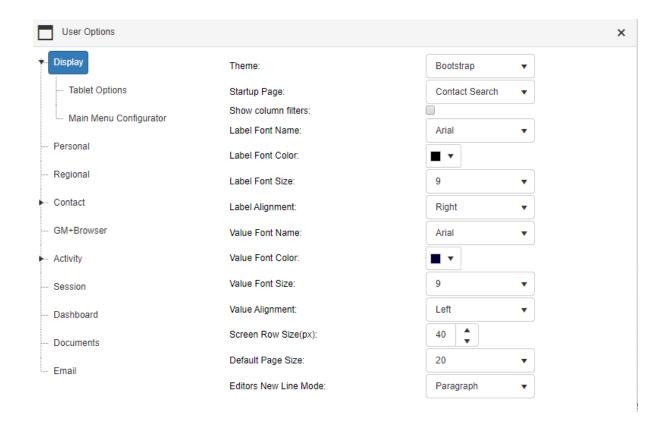
Value Alignment: This setting controls the alignment of the value text. The options are Left, Right, and Center.
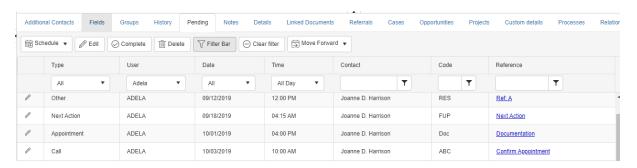
Default Page Size: The default page size can be set to 10, 20, 50, or 100.

Editors New Line Mode: When creating a new line in an editor, choose Paragraph or BreakLine for when the >Enter> key is pressed.

Tap **OK** at the bottom of the page to save changes.

The filter bar is displayed by default with the **Show column filters** setting checked above.
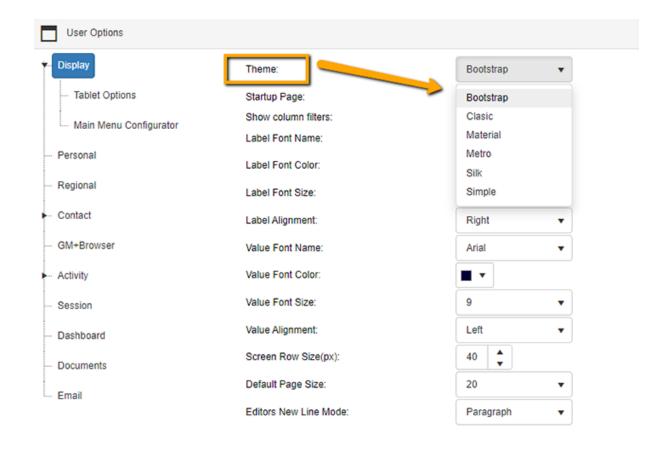
6.1.1.1 Change Themes

There are different themes available for the display of wMobile Desktop.

Tablet themes were been added in wMobile start with 3.1 version, for use on iPads and tablets. These settings will only be used if an iPad or tablet operating system is detected. To verify, or try other themes, select **User Options** from the menu bar, under the user name. Select **Display** on the left to access display settings.

Themes for use on full browsers on computers and laptops can be set under **Theme**.

Expand the **Display** options node using the arrow ">" sign to locate settings for iPads and tablets.

Tap in the **Tablet Options** node to access the tablet specific settings (see <u>Tablet Display Options</u> for details).

Tap **OK** at the bottom of the page to save changes.
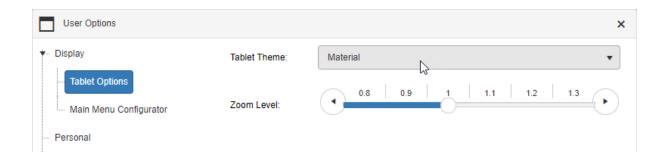
6.1.1.2   Tablet Display Options

Expand the **Display** options node using the arrow ">" sign to locate settings for iPads and tablets.
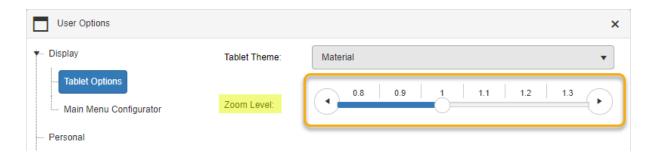
When a tablet operating system is detected such as an iPad or Droid tablet, these settings will be used.
NOTE: The **Material** theme is the default and recommended theme.

Zoom Level allows control over the general size of the page/components. This may be needed to adjust the zoom for particular devices.

Tap **OK** at the bottom of the page to save changes.
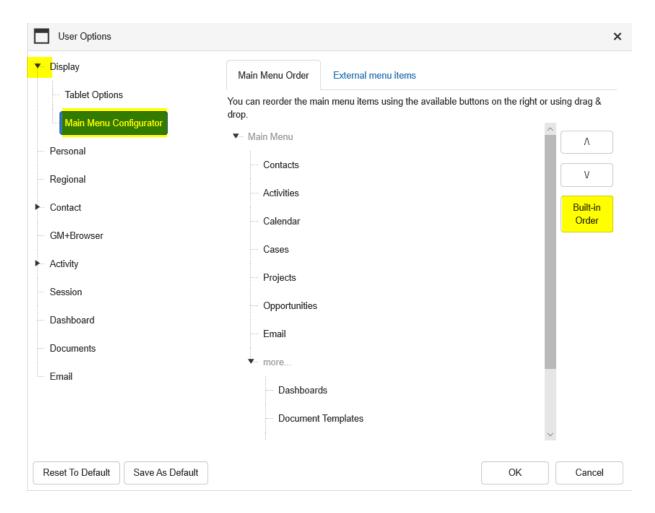
6.1.1.3   Navigation Menu Configuration

The navigation menu can be customized so users have the features they use frequently easily accessible. Less used features can be accessed from the down arrow at the end of the menu. This customization can be done by end-users in **User Options** or administrators in the wMobile Manager Console.
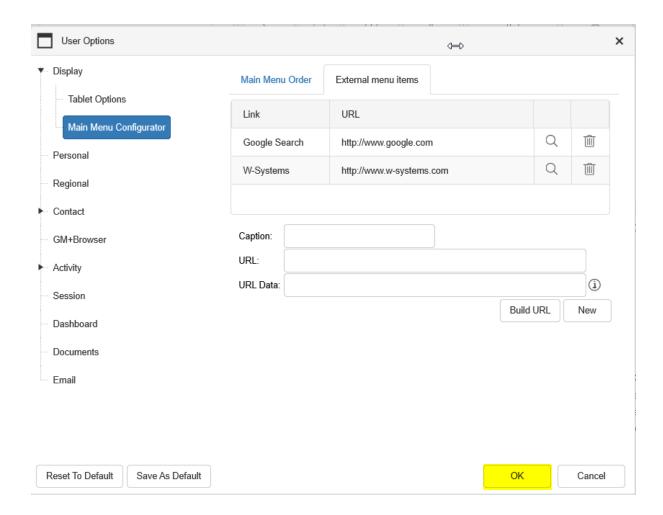
End users will access **User Options** from the user name menu.

Expand the **Display** section and select **Main Menu Configurator**.
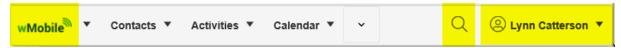
You will see your main menu displayed in a tree view. You can start to reorder using drag & drop or using the available buttons on the right. If you press on the '**Built-in Order**' button, the main menu will be reset to the default order provided by the application.

After reordering, tap '**OK**' and the main menu will be reloaded.
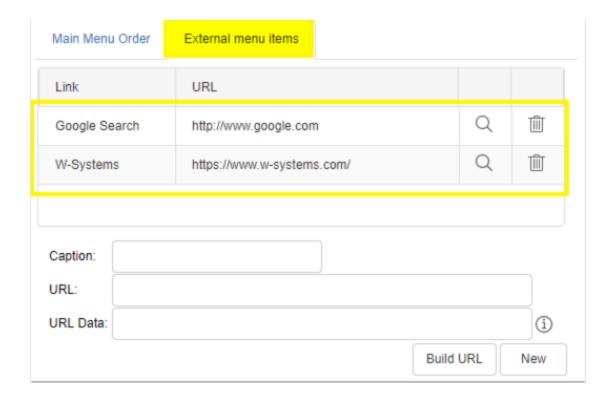
Note: The Logo in the upper left, the Search button and the User Profile menu on the right cannot be moved.
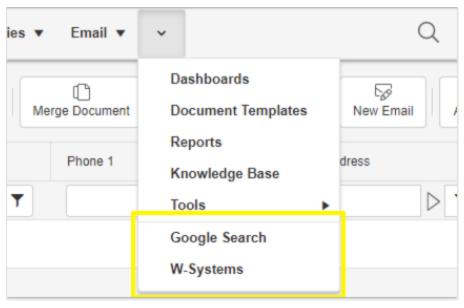
6.1.1.3.1 External Menu Items
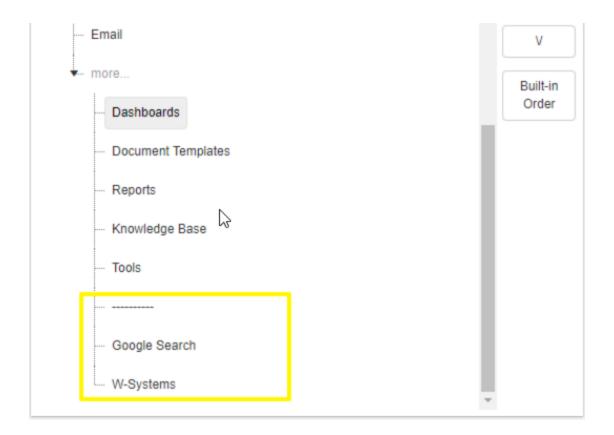
External menu items (URLs to external pages) can also be added to the navigation bar. Select the **External menu items** tab. Enter Caption and URL (web address) and select **Build URL**. Examples are shown below.
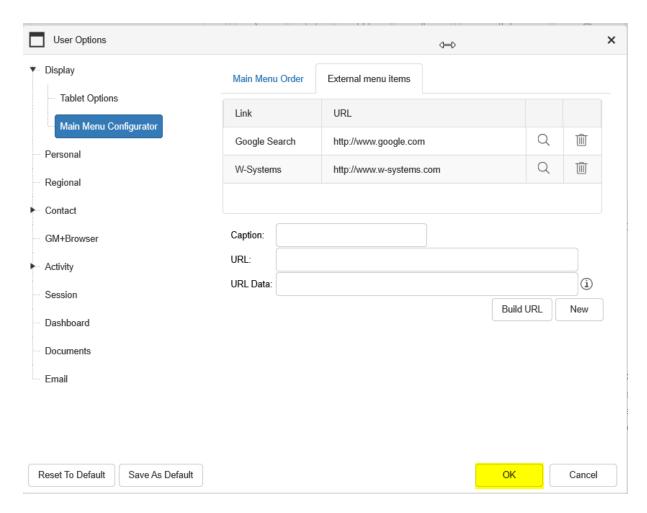
This is how they are displayed in the Main Menu. Before these items, a line separator will be added.

The external menu options will be listed in the Main Menu Configuration list as well and can be reordered as needed.

After reordering, tap '**OK**' and the main menu will be reloaded.

6.1.2   Personal Options
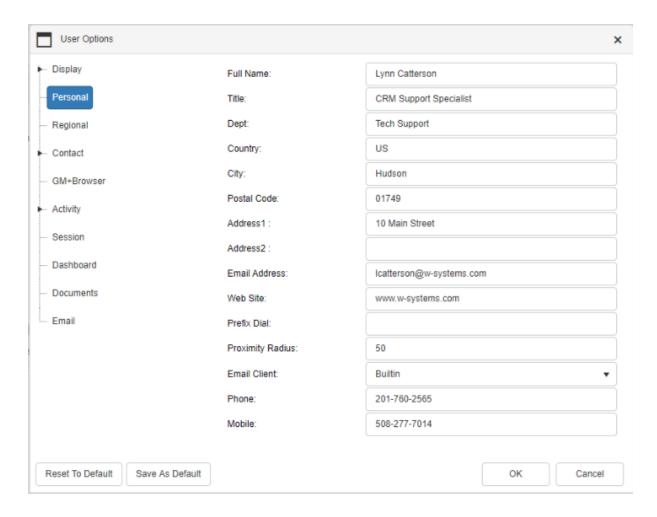
The **Personal Options** are displayed in both **wMobile Phone Edition** and **Desktop Edition**. These settings are used in wMobile Phone edition for mapping functions.

Personal settings include mailing and address information used mainly in the Phone Edition.

Prefix Dial: Set this if your phone requires a dialing prefix.

Email Client: The email client selection options are Builtin or System Default. This setting controls wMobile's behavior when you tap on an email address hyperlink. Depending on the setting here, the email will be created using wMobile as the email client (Builtin) or your device's email client (System Default).

Contact Set: wMobile Desktop supports multiple contact sets. To switch from one contact set to another, select the appropriate contact set from the drop-down list.

Tap **OK** at the bottom of the page to save changes.

6.1.3   Regional Options

Regional settings control display and formatting for time, language, date, currency, and distance units. NOTE: The settings in this example are appropriate for the US, but can be adjusted for other countries.

Time Zone: Select the time zone in which you reside.

Language: Set for the appropriate language.

Short Date Format: Select the date format for short dates as you prefer them to be displayed. The differences are in the order of month, day, and year and whether they are separated by slashes (/) or dashes (-).
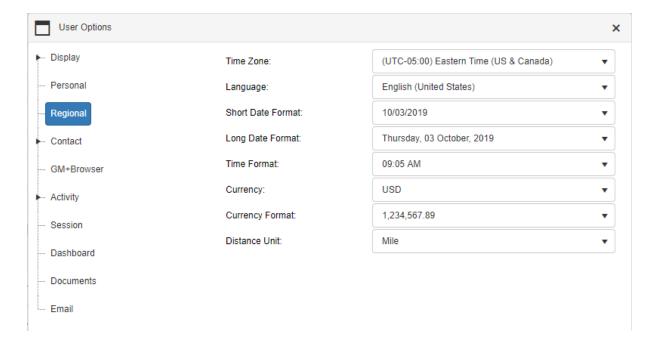
Long Date format: Select the date format for long dates.

Time Format: Select the time format you prefer using AM/PM (such as 03:00 PM) or what is sometimes referred to as military time or 24-hour clock (e.g., 15:00).

Currency: Select the currency for your country, such as USD, EUR, GBP, CAD, etc.

Currency Format: Select the appropriate currency format for your country.

Distance Unit: Select KM or Mile for the distance unit.

Tap **OK** at the bottom of the page to save changes.

6.1.4   Contact Options

Contact Options include display settings for the Contact screen.

📄 **FONT SELECTION NOTE**: Font selections here pertain to the Contact screen settings. For changing fonts displayed when viewing activities and opportunities, there are separate settings for the those screen in [Display Options]().

Label Font Name: Select a font for the label text. Options include Arial, Times New Roman, Lucida, Comic Sans MS, and Monospace. As an example, "Contact" is label text in the screenshot below.

Label Font Color: A color can be selected for the label text from a color palette. The default color is black.

Label Font Size: A font size can be set for the label text ranging from 6 to 20. The default setting is 9.

Label Alignment: This setting controls the alignment of the label text. The options are Left, Right, Center.

Value Font Name: Select a font for the value text. Options include Arial, Times New Roman, Lucida, Comic Sans MS, and Monospace. As an example, "Susan Smith" is value text in the screenshot below.

Value Font Color: A color can be selected for the value text from a color palette. The default color is black.

Value Font Size: A font size can be set for the value text ranging from 6 to 20. The default setting is 9.

Value Alignment: This setting controls the alignment of the value text. The options are Left, Right, Center.
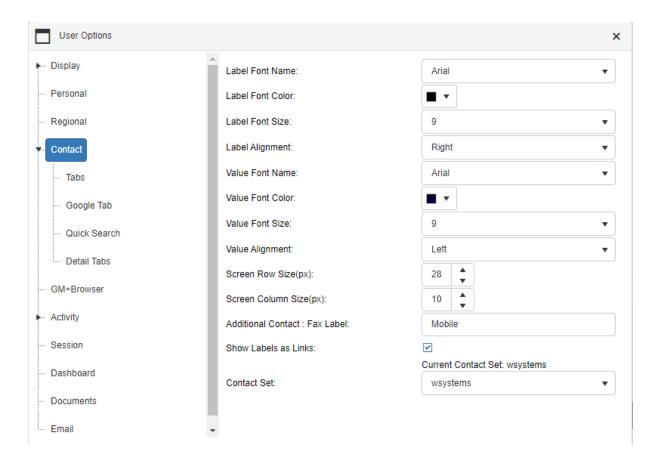
Screen Row Size (px): This setting adjusts the space between the rows. The default is 28. Use the up and down arrows to adjust or type in the value desired.

Screen Column Size (px): This setting adjusts the column size across the screen from left to right. the default setting is 10.Use the up and down arrows to adjust or type in the value desired. If increased to the point where the fields extend further to the right than will fit on the screen, a scroll bar will appear.

Additional Contact: Fax Label: The label text for the additional contact's "Fax" field.
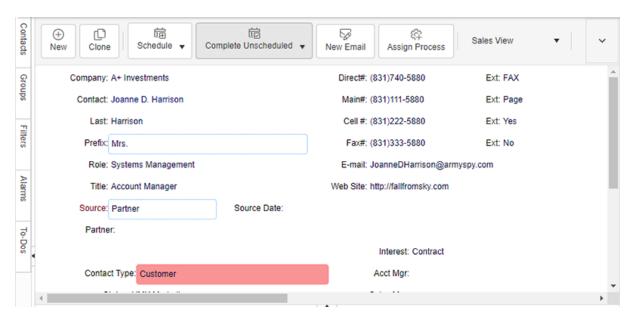
Show Labels as Links: Show the labels as hyperlinks.

Contact Set: wMobile Desktop supports multiple contact sets. To switch from one contact set to another, select the appropriate Contact Set from the drop-down list.

Tap **OK** at the bottom of the page to save changes.
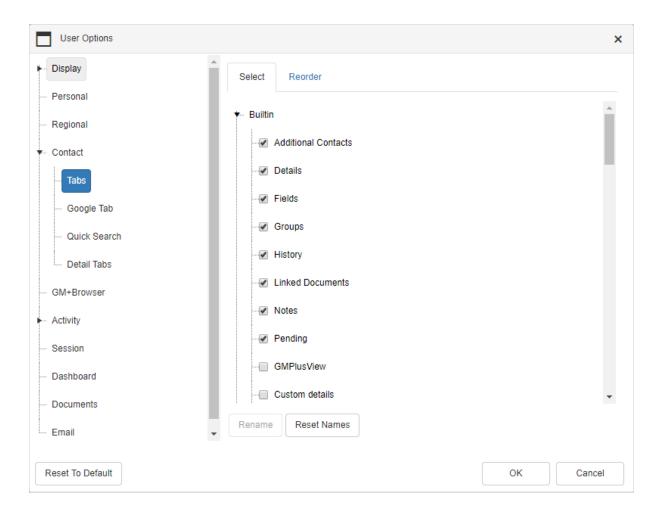
Example of Contact view with the settings as pictured above.

6.1.4.1   Tabs
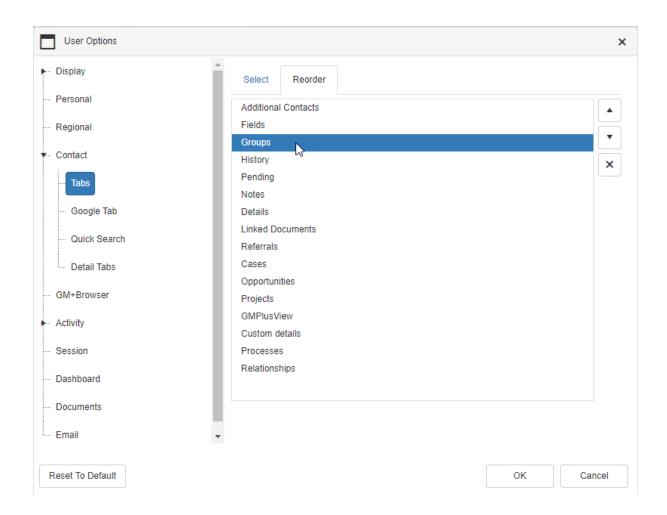
The **Tabs** settings control which tabs are displayed at the bottom of the contact screen.

Place a tick in the checkboxes for the tabs you use and remove the ticks from any tabs that you don't use or don't wish to see. Custom tabs can be selected as here as well.

Tap on the **Reorder** tab to change the order in which the tabs appear.
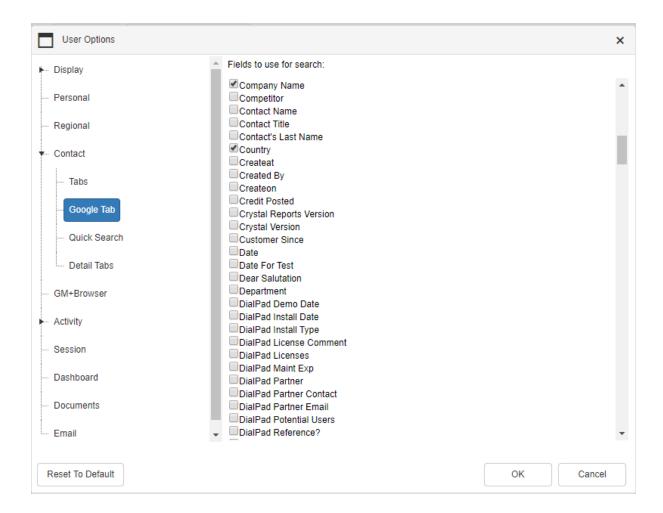
Select a tab on the list and use the up and down arrows to change the order of the tabs. The topmost item on the list will be the first tab displayed (on the left) on the bottom half of the contact window.

> ⚠ **IMPORTANT**: wMobile administrators can set the access to contact tabs on behalf of users by using wMobile Manager Console. For details, please see: Managing Contact Tabs in wMobile Desktop.

6.1.4.2   Google Tab
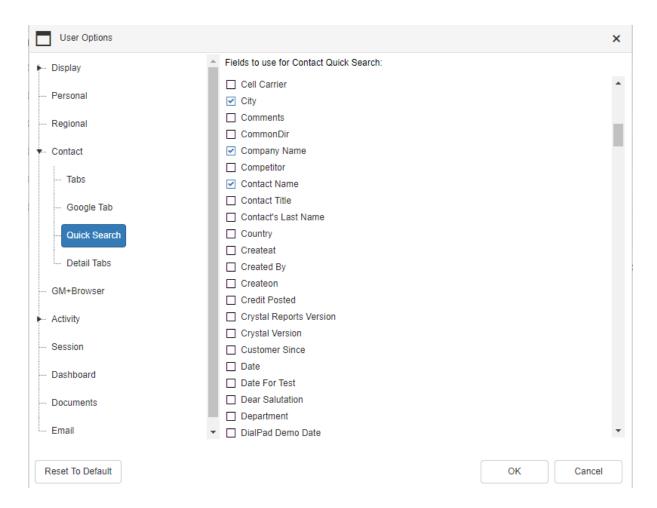
Select the fields to be used to with **Google** search.

6.1.4.3   Quick Search
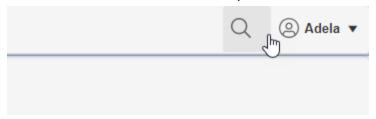
Select the fields to be used in the **Quick Search** option in the upper right hand corner of the wMobile Desktop window. By default, Company Name, Contact Name and City are selected.

Checkmark the fields that will be useful for you to search on:

The fields selected will be used in the **Search.**

The **Quick Search** is found near user name. After tapping on the magnifying glass the **Search contact record** window is opened:
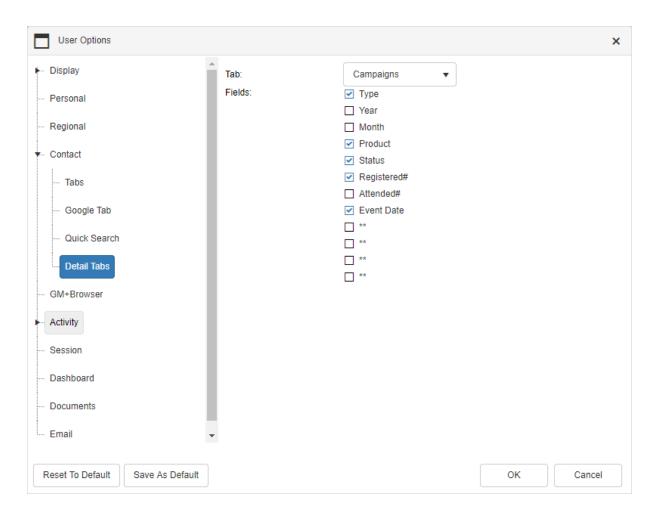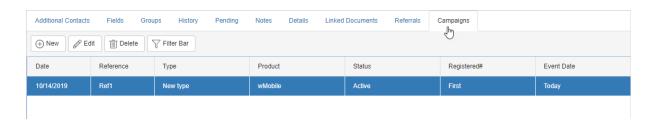
Click here for further information on search functionality.

6.1.4.4   Detail Tabs

Any custom details created in your GoldMine will be listed on the Tab drop-down list. Once selected, select the fields to display for that detail. There are now up to 12 associated fields with Details, but you might not be using all of them.
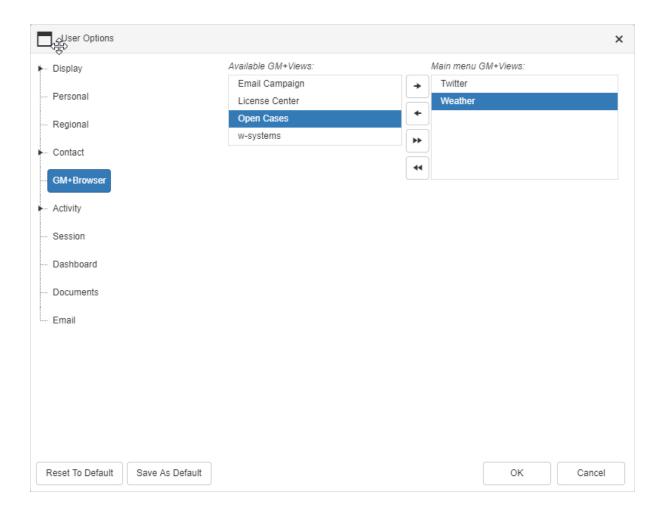
This is the custom detail "Campaigns" tab with the fields selected as above.
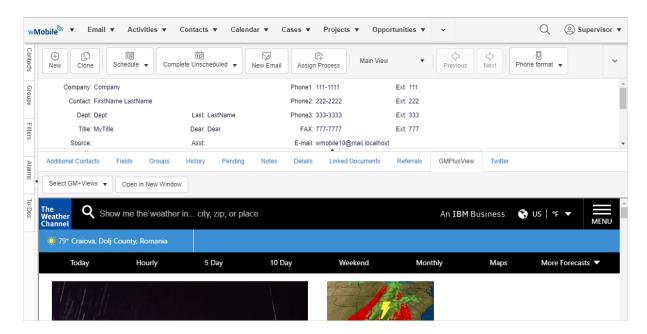
6.1.5   GM+ Browser Options

If your GoldMine has been customized to include **GM+Views**, then they will be available for selection in wMobile Desktop. The Car and Property examples are provided by GoldMine with a demo installation. Some other common examples are Weather, Google Maps, or Twitter. Some customers might have customized GM+Views to show other custom data in a web format such as accounting data, sales, or reports.

The selections that were added will appear in wMobile Desktop on the GMPlus View tab.

6.1.6   Activity Options

The **Activity Options** set behavior with scheduling and completing activities in wMobile Desktop.

Set alarm on new activities: If checked, this will automatically set an alarm on all activities created in wMobile Desktop.
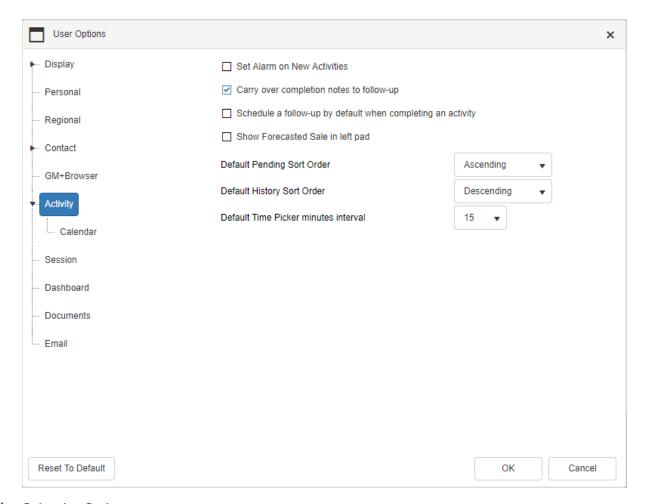
Carry over completion notes to follow up: If checked, any activity notes will be copied over to the follow up activity. reducing typing.

Schedule a follow up by default when completing an activity: With this option checked, when an activity is completed, a new window will come up automatically to schedule a follow up activity.

Default Pending Sort Order: This option controls the sort order on the Pending tab of the Contact screen. Ascending will sort the activities in ascending order from oldest at the top to newest on the bottom of the page. Descending order will sort the activities from newest on the top to oldest on the bottom of the page.

Default History Sort Order: This option controls the sort order on the History tab of the Contact screen. Ascending will sort the activities in ascending order from oldest at the top to newest on the bottom of the page. Descending order will sort the activities from newest on the top to oldest on the bottom of the page.

Default Time Picker minutes interval: This option sets the default duration of an activity.

6.1.6.1   Calendar Options

Calendar Options control how the calendar is displayed in wMobile Desktop. Access from the **Activity** section in the User Options as shown in the image below.

Calendar Font Size: Select a font size for the calendar activities ranging from 6 to 20. The default setting is 9.

First Day of the Week: Select the first day of your work week that should be displayed on the wMobile calendar.

Last Day of the Week: Select the last day of your work week that should be displayed on the wMobile calendar.

Start Hour: Select the hour you typically start work. The calendar will be displayed beginning with this time.

End Hour: Select the hour you typically end work. Activities will be displayed on your calendar ending at this time.

> 📄 **NOTE**: The calendar will only display the days and time selected in these options. If an activity is outside the days and times selected in the preferences, it will not be visible.

Minute Interval: Select the interval for the calendar display. The options are 10, 15, 20, 30 or 60. The shorter the timeframe, the longer the calendar list will be, but there will be more room to show activities.
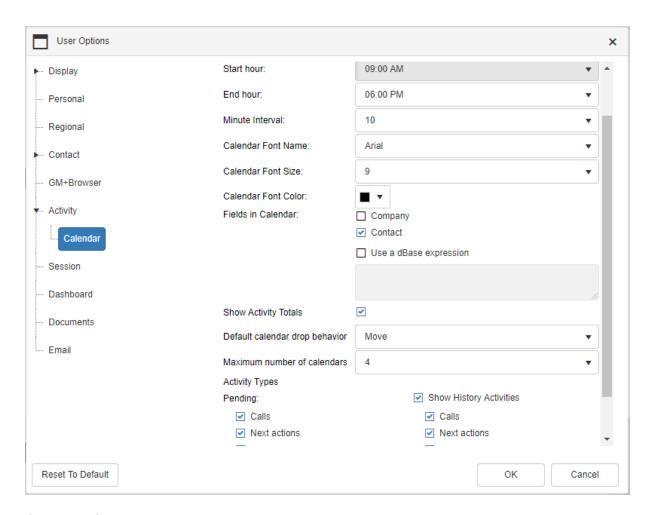
Calendar Font Name: Select a font for the label text. Options include Arial, Times New Roman, Lucida, Comic Sans MS, and Monospace.

Calendar Font Color: Select a color for the text. The default color is black.

Fields in Calendar: Tick the Company and/or Contact checkbox to display them for activities on the calendar.
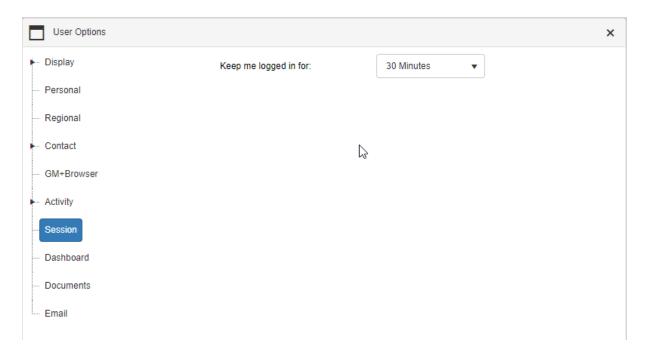
Activity Types Pending: Tick the Activity Types checkboxes to be displayed on the calendar: Calls, Next Actions, Appointments, Others, and/or Events.

Show history activities: Tick the completed activity typescheckboxes to be displayed on the calendar: Calls, Next Actions, Appointments, Others, and/or Events. These activities will be displayed with a line through them to distinguish them from Pending activities.

6.1.7   Session Options

Keep Me Logged In for: This option controls the timeout setting in wMobile Desktop. If you are not active in wMobile Desktop, set how long before you are logged out of wMobile Desktop. The setting ranges from 30 minutes to 1 day.
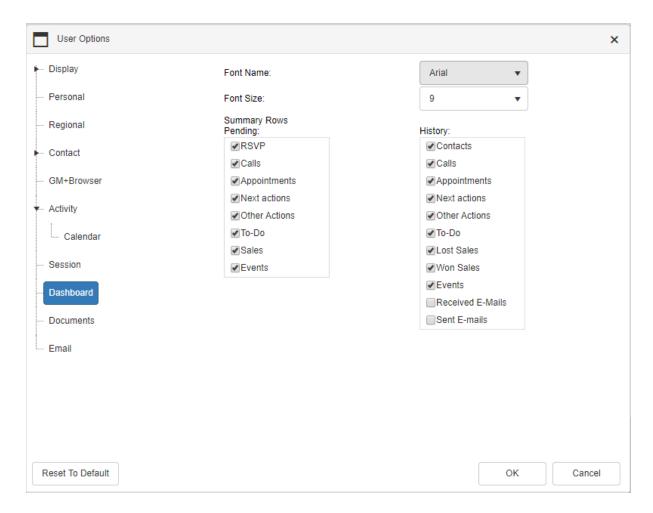
6.1.8   Dashboard Options

Font Name: Select a font for the Dashboard text. Options include Arial, Times New Roman, Lucida, Comic Sans MS, and Monospace.

Font Size: A font size can be set for the Dashboard text ranging from 6 to 20. The default setting is 9.
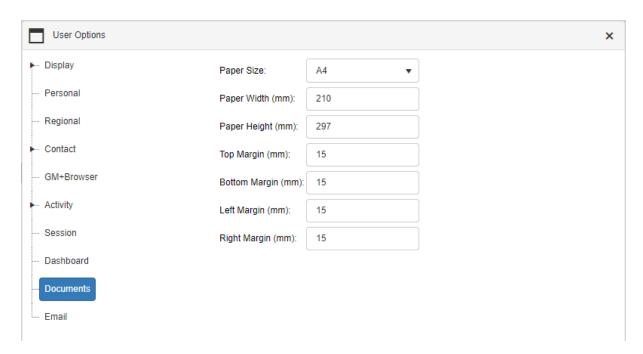
Pending: Select the pending activities to be included in the Dashboard summary.

History: Select the history activities to be included in the Dashboard summary.

6.1.9   Documents
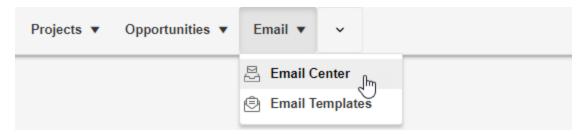
Default document settings can be made here.
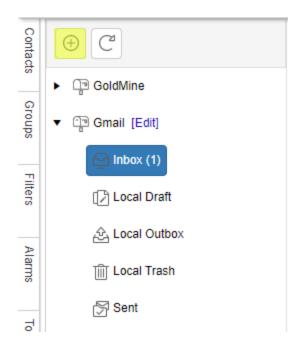
6.1.10 Configuring Email

In order to use wMobile to send and receive email, an email account must be configured. These settings are not copied from GoldMine and might be different when accessed outside the network vs. when GoldMine is accessed on the network. Email accounts can be configured in wMobile Phone, wMobile Desktop, or from the wMobile Manager Console.
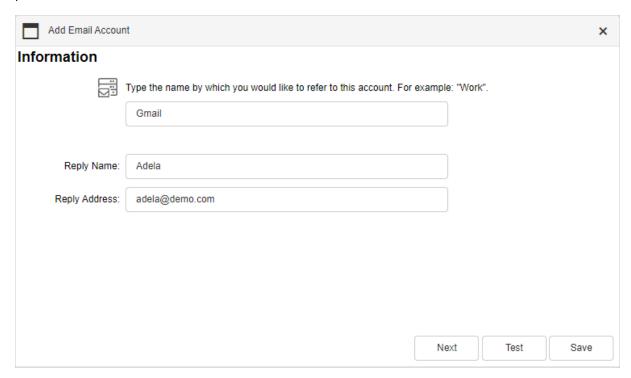
To configure an email account in wMobile Desktop, select **Email > Email Center** from the wMobile Desktop menu.
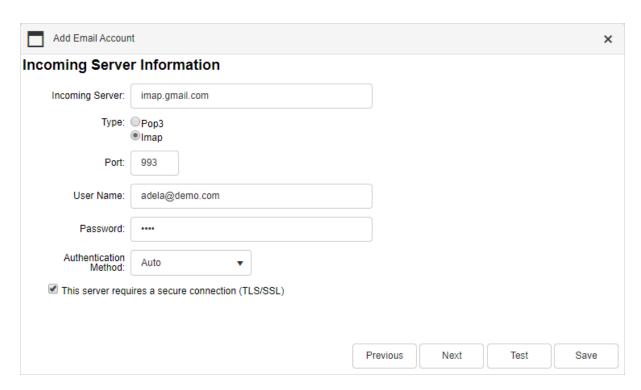
If an email has already been added, it will appear in the list and the settings can be accessed by tapping on **Edit**. Otherwise, tap the **+** sign as highlighted below to add a new account.
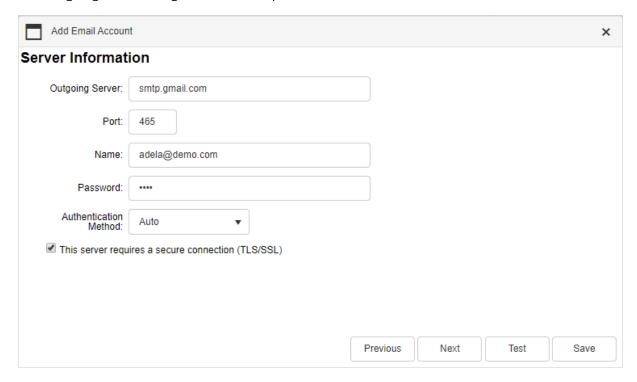
Add a name for the email account that you'll recognize, your name and email address. Select **Next** to proceed to the next screen.

Add incoming email server information. You should be able to obtain this information from your Internet Service Provider, your IT Administrator or consultant, or possibly from your GoldMine email settings. Click **Next** to proceed to the next screen of settings.

Add outgoing email settings. Click **Next** to proceed.
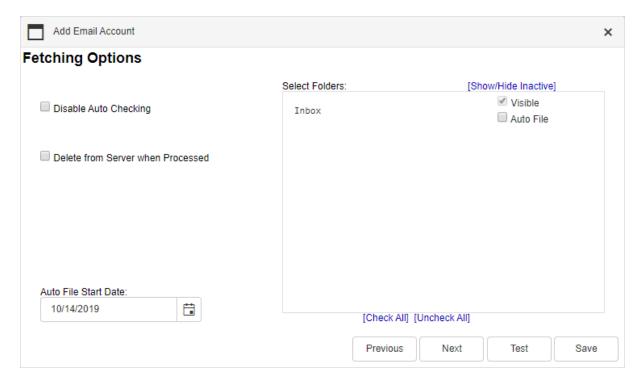
Add Fetching settings if appropriate. wMobile offers auto-file functionality with IMAP type email accounts, which can automatically file email to GoldMine History based on a matching email address. This can be managed here, but is usually set by an admin in the Manager Console. If auto-filing Sent
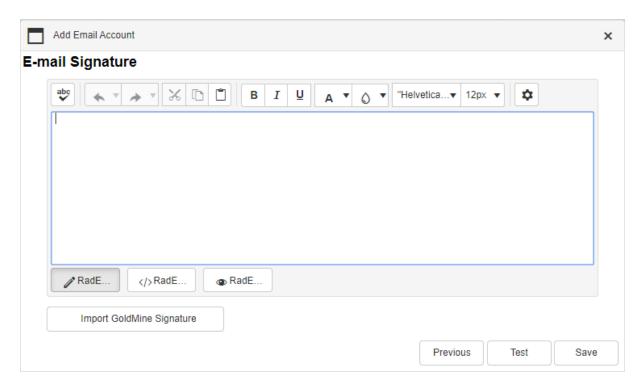
email, verify the name of the Sent folder in the Sent Items Directory. For example, in Outlook the folder is labeled 'Sent Items.' In GMail, it's 'Sent Mail.'

If '**Disable Auto Checking**' is set, the wMobile fetcher service will not go out to the server or ISP mailbox to check for new emails. Typically, this is left unchecked so users will see new mail in wMobile.

If '**Delete from Server when processed**' is checked, emails will be removed from the server or ISP mailbox when they are filed and/or deleted. This should be checked to avoid downloading the same emails repeatedly. However, in some cases, users wish to view emails in multiple email clients such as wMobile, GoldMine, Outlook, native phone clients, and/or web interfaces. Leave this unchecked if you wish to be able to access the same emails in multiple email clients, even after they are filed or deleted in wMobile.
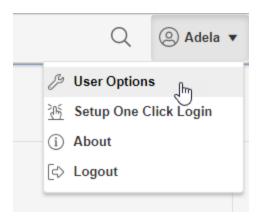
Type in or copy/paste an email signature or use **Import GoldMine Signature**.

The email credentials can be tested using the **Test** button. Select **Done** when all configuration is completed. You will then be able to use wMobile Desktop to send and receive emails using this email account.

6.1.10.1 Email Settings

Email settings can be accessed from the User Options menu. Select **User Options** under user name.
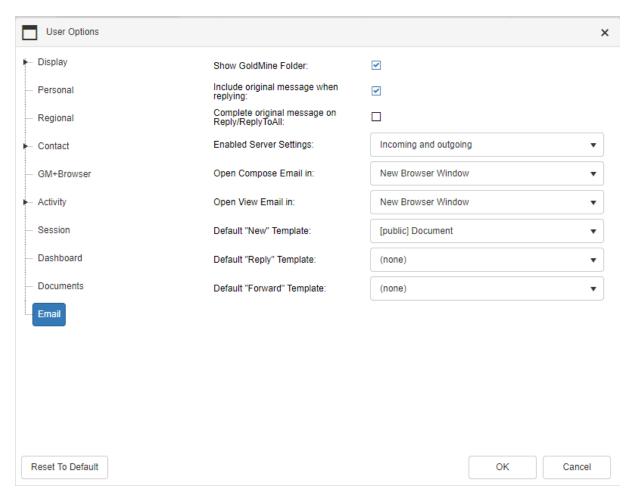
Select the **Email** tab as shown below.

If 'Show GoldMine Folder' is checked, then the GoldMine inbox will be listed in the wMobile Desktop Email Center as well as the Online Inbox.

When composing an email, or selecting an email, it is recommended to to select **New Browser Window**. You can then send or process email, without having to wait for the email list to refresh.

Email templates can be selected for new emails, reply emails, and forwarded emails.

6.2   Customizing wMobile Desktop Edition
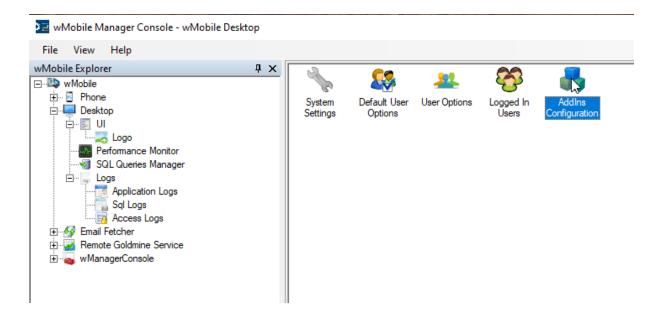
wMobile Desktop Edition can be customized in a variety of ways:

📄 wMobile Desktop AddIn Configuration

This documentation assumes you have some familiarity with GoldMine database structure and the ability to identify GoldMine field names. If assistance is needed for customization, please contact your wMobile reseller or wMobile Support.
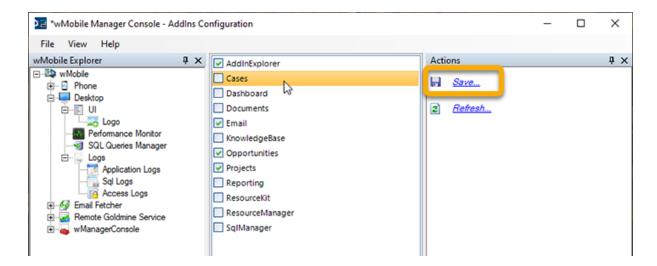
6.2.1   wMobile Desktop AddIn Configuration

To make adjustments to AddIns for wMobile Desktop, open the wMobile Manager Console. In the **wMobile Explorer** window, select the **Desktop** node and then double-click the **AddIns Configuration** icon in the center window.
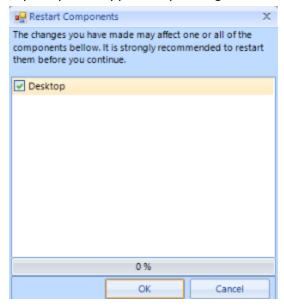
The Addins will be listed as shown below. Any of the features listed that are not going to be used based on your needs can be disabled by unchecking the AddIn item. (**NOTE**: If you have a custom AddIn provided by W-Systems, you will see it in this list as well.)

Following is an example of disabling the **Cases** Addin. If you don't use GoldMine's **Service Center** for cases, you might want to disable the **Cases** AddIn by un-checking it as shown below. Click **Save** (shown highlighted in yellow) in the **Actions** window to preserve this change.

A prompt will appear requesting to restart the **Desktop** component; click **OK** to proceed.
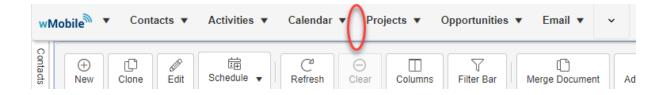
NOTE: Restarting the Desktop application will cause users to be forced back to the wMobile login page.
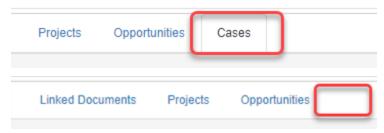
When a user logs into wMobile after these steps are taken, the items related to **Cases** in the Desktop Edition, such as the option to open "Cases" will no longer be displayed. Further, the option to display the tab (in this example "Cases") will not be available in User Options. See the following screenshots for examples of before and after disabling the **Cases** AddIn:

Removed from Toolbar:
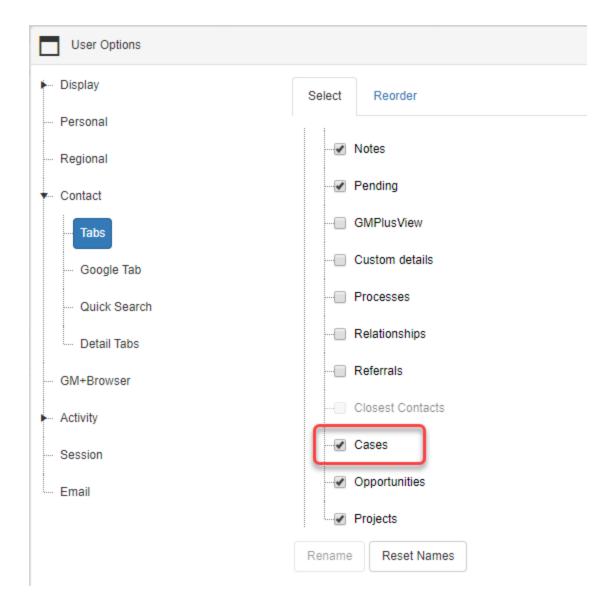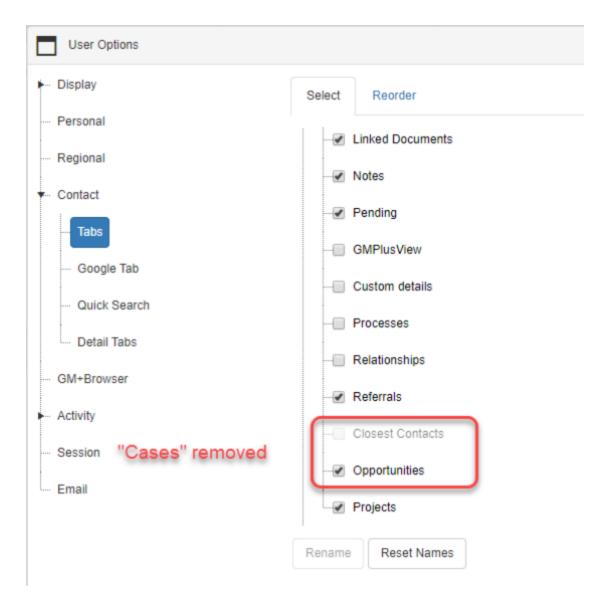
Removed from Tabs:

Removed from the User Options:
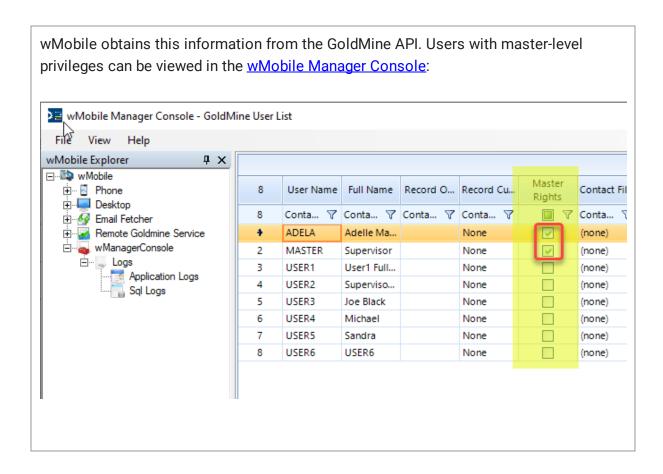
6.2.2 Setting Default Tabs for Desktop Users
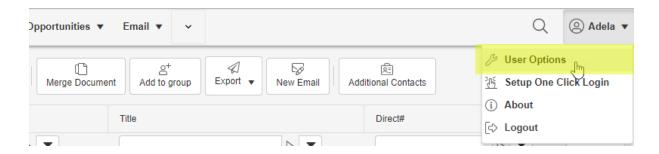
wMobile provides a way to save and use the Desktop edition's tabs configuration as a default set. When it is desired that all users have the same set of tabs displayed, this default can be used to set the tabs for all users at one time.

Following are the steps detailing how to save a default tabs configuration and then apply it to all users.
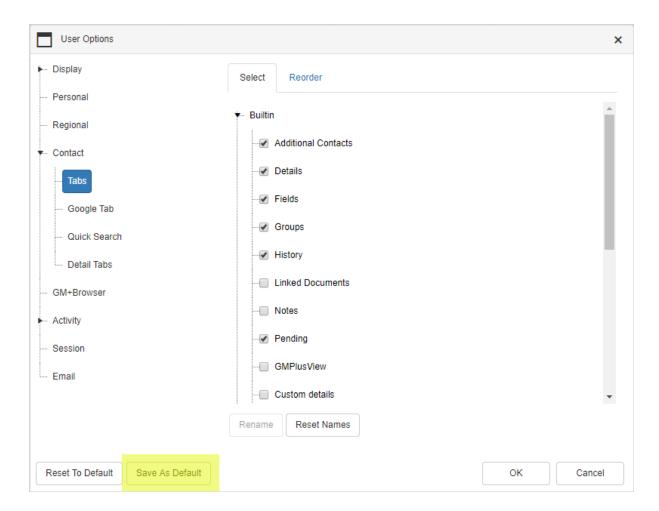
> 📄 **NOTE**: The **Save as Default** button, required in the following steps, is only available for master-level users. The master-level privilege is set and maintained in GoldMine.

wMobile obtains this information from the GoldMine API. Users with master-level privileges can be viewed in the [wMobile Manager Console](#):

Start by selecting **User Options**, under the user name from menu bar to open the **User Options** dialog:
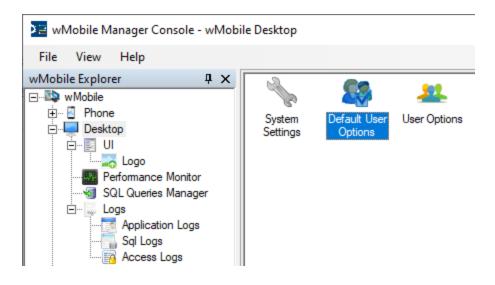
Select the tabs to be displayed, click the **Save As Default** button, and then the **OK** button to close the dialog.
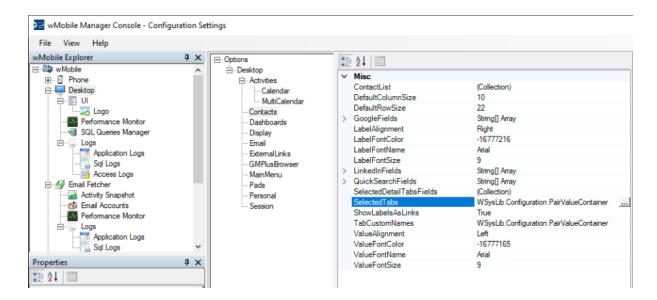
To apply the default tab selection to all users:
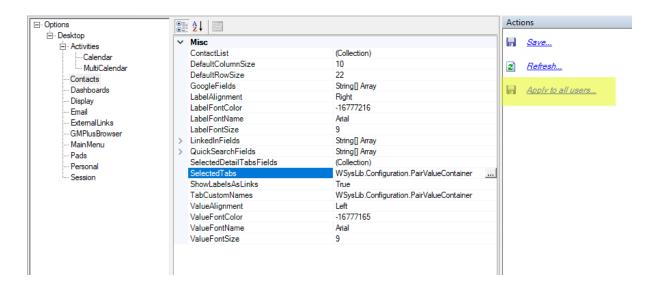
1. Open the wMobile Manager Console and select the **Desktop** node in the **wMobile Explorer** window.

2. In the center window double-click on the **Default User Options** icon.

The center window will now display the options available. In the center window, navigate to **Options > Desktop > Contacts** and click on the **SelectedTabs** setting as shown.

Select **Apply to all users** as shown.

When prompted, select **Current setting "Selected Tabs"** to apply this setting to all users.

The next time a user logs in, they will have the their tabs set based on the defaults.

For further information in this manual, see:
📄 Configuring wMobile Default User Options

Blog post article link: Setting wMobile User Option
https://www.w-systems.com/blog/setting-wmobile-user-options/

6.3 General Editing
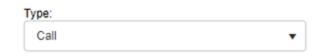
This topic covers general editing features that are important to know as they're used throughout wMobile Desktop's user-interface.

When editing certain field values like "**Reference**" or "**Code**" while scheduling or completing an activity, editing field information, or adding new contacts, wMobile will allow you to either choose a pre-defined selection entry from a drop-down list or type your own entry. The pre-defined selections that are available in the drop-down lists are maintained within GoldMine or wMobile Desktop by an administrator with master rights (i.e., GoldMine's F2 Lookups).

Drop-down List Selection

This field has a restricted drop-down list:
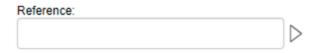
Please take note of the "arrow" sign to select the value from the list. A selection can be made from the list. Free form text entry is not permitted.

This field allows manual entry or selection from a Lookup list:

Entries into this type of field can be made by:

- Typing a value directly into the field.
- Clicking the "arrow" sign to allow a selection to be made from a Lookup list that will display.
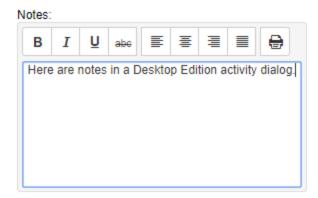
Reference:

Editing Notes (Pending and History Records)
Pending activity notes and history record notes play a key role in keeping solid relationships with your contacts. Within the notes field for these record types, you can add, edit, or simply review notes for the current activity.

Notes textbox:

The notes field is a multi-line free-form text box. Enter helpful information here to aid in upcoming activities (Pending) or meaningful information describing what occurred for an activity (History). Text is edited in the same way for both pending and history notes.

Notes:

Here are notes in a Desktop Edition activity dialog.

6.4 Connecting to wMobile
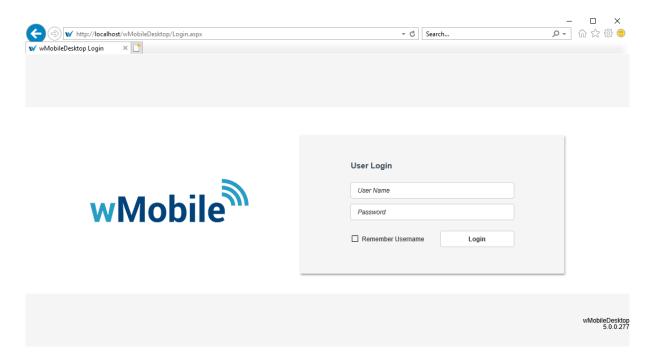
Connecting to wMobile Desktop Edition is very simple. Nothing needs to be installed on your device before you can use wMobile (i.e., typically referred to as an "app" people today are familiar with). All you need is an Internet browser, an Internet connection, and the web address for your company's wMobile Desktop to get connected.

📄 Logging into wMobile Desktop Edition

📄 [Using a One Click Login](#)

6.4.1   Logging into wMobile Desktop

Open an Internet browser such as Internet Explorer, Firefox, Google Chrome, or Safari. Browse to the web site for your company's wMobile Desktop. This should have been provided to you by your wMobile administrator. Use your GoldMine username and password to log into wMobile. There is a **Remember Me** checkbox that can be used if you are the only user on your computer and don't want to have to enter your username each time.

6.4.2   One Click Login
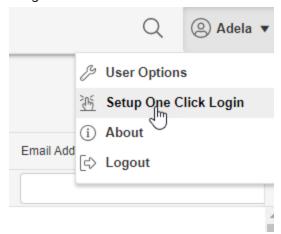
wMobile can generate an encrypted web address (URL) that contains your organizations wMobile server address combined with your username and password. If your [administrator has enabled this feature](#) it will allow you to copy this URL and save it as your wMobile stored link for easy access without having to type your user name and password. On some devices, the web page can be associated with a keyboard shortcut to offer the most convenient wMobile access.

📄 **NOTES**:

- If your GoldMine password is changed after creating a One Click Login, that One Click Login will no longer work and a new one would need to be created.

> - One Click Login can be [restricted](#) if your company's security policy requires users to log in with their username and password each time.

To generate the web address click on **User Options > Setup One Click Login**:
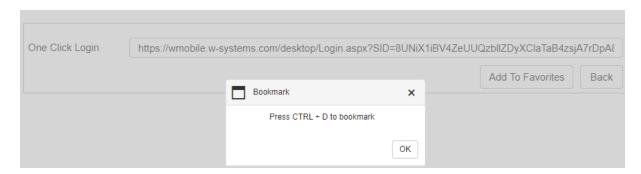
A page similar to the following image will appear. Click the **Add To Favorites** link to save the One Click Login as a favorite/bookmark (based on your browser preference). For advanced users, you may also copy and paste the URL as you wish if you familiar with that process.
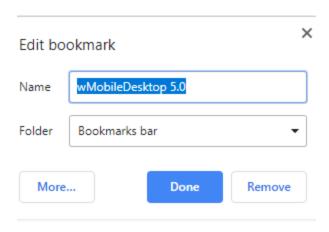
Bookmarking varies based on browsers. Use your browser's option to save the web address as a browser favorite or bookmark. Some examples are provided below.

In Chrome and Firefox, you will be prompted to use the **Control + D** keys on your keyboard to bookmark.
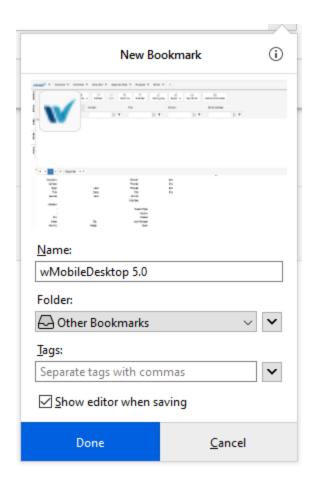
[Chrome](#):
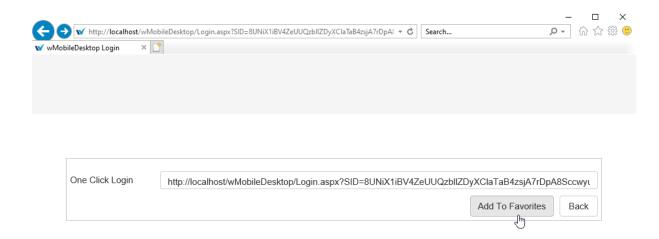
You can update the Name as you like, and select an appropriate folder or bookmarks bar. Click **Done** to save the bookmark.

Firefox:
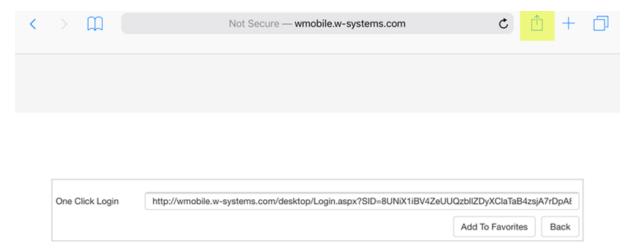
Internet Explorer:
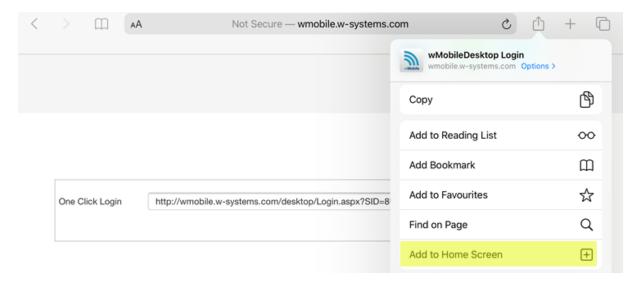
Using whichever browser, your One Click Login will appear where you saved it. If you saved it into your browser's bookmark bar, it will be displayed with the new icon.
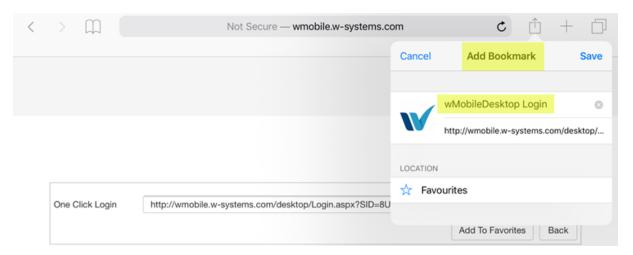
You can also save a One Click icon for wMobile Desktop on an iPad or tablet.   In Safari, on an iPad, the Share icon would be used as highlighted below.
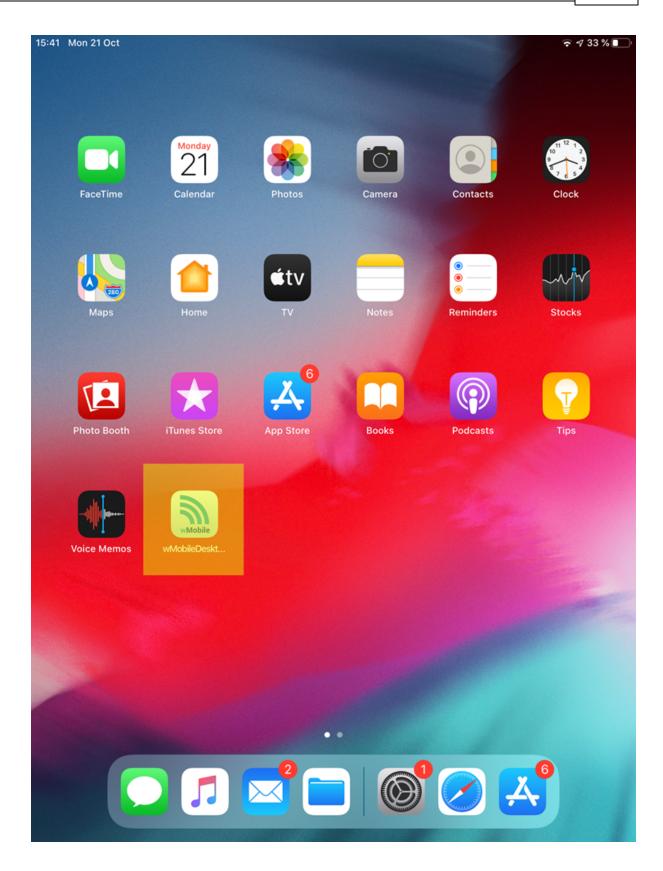
Select to **Add to Home Screen**. (You could also use **Add Bookmark** which would save a bookmark in the browser bookmarks, instead of on the Home Screen.)

Give the bookmark a name and click **Add**.

The new wMobile One Click Login will be placed on your home screen and can be moved as desired.

6.5   Searching for Contacts

There are 3 fast and easy ways to search for contacts in wMobile Desktop. See each section below for specific instructions:

📄 Quick Search
📄 Contact Search
📄 Label Search

6.5.1   Quick Search

The **Quick Search** is located at the top right of the wMobile Desktop Window.

The search includes the company, contact, and city fields by default, but this can be customized.
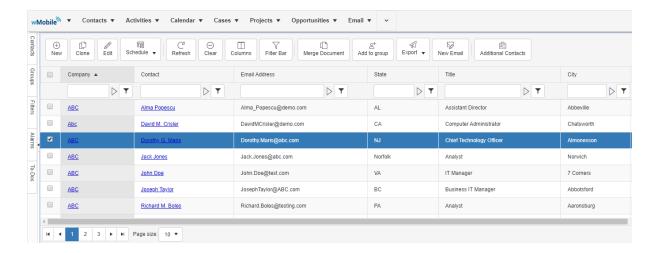
Click on magnifying glass from menu bar.
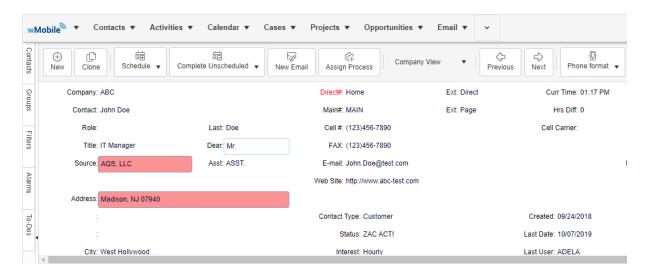
Enter part of a company, contact name or city in **Search here...** field and click on magnifying glass.

- You will be presented with a list of potential matches.
- Any item highlighted in blue and underlined is a hyperlink. Click on it to bring up the contact details.
- Use the scroll bar on the right to go up and down on the list.
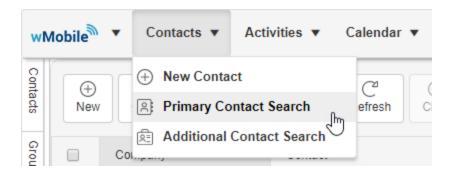
After clicking on a company or account hyperlink, the record will be displayed on the Contact window.

6.5.2   Contact Search

The **Contact Search** can be initiated from the **Contacts** menu. Select **Primary Contact Search** or **Additional Contact Search** from the menu.

The **Contact Search** might also be your default when you log into wMobile Desktop.
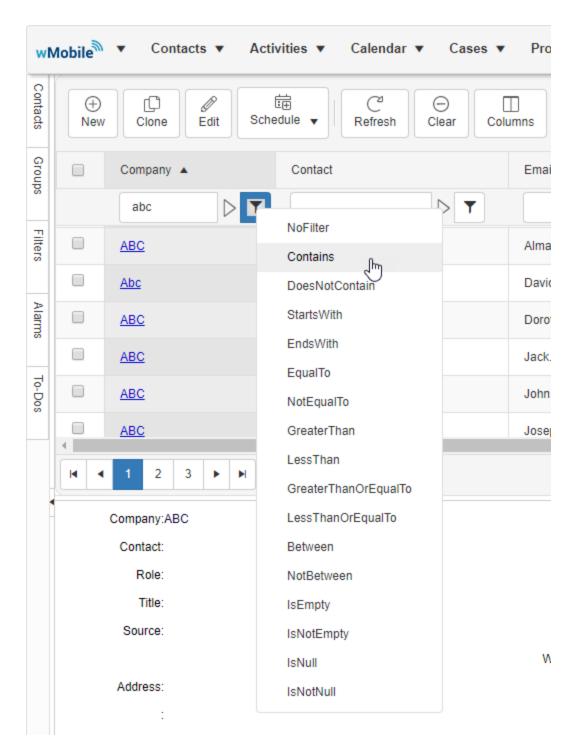
Enter your search criteria.

There are a number of filter comparison options as pictured to the left. The default is "Starts with" which is most commonly used.

The default option will be used if you don't make a filter comparison selection and just click elsewhere on the window.

The search results will be displayed in a list.

The fields in the **Contact Search** can be customized using the **Columns** button in the **Contact Search** menu bar.

6.5.2.1   Contact Search Menu Bar

There are a number of other options available on the Contact Search Toolbar:

New: This option takes you to a blank contact form where you can fill in the new contact information. (**NOTE**: this option might not be present depending on security settings. Adding new contacts can be restricted administratively.)

Clone: Select Clone to copy check-marked contact records.

Edit: This option will open the highlighted contact for editing.

Delete: Click Delete to delete a selected contact. This option is dependent on GoldMine permissions. Only one contact can be deleted at a time.

Schedule: You can schedule any type of activity from the drop-down list: Call, Appointment, Other, Next Action, Sale or Event.

Refresh: Use the Refresh button to search again and refresh the list.

Clear: Use **Clear** to remove any search criteria.

Columns: Select Columns to add or remove columns in the Contact Search as shown below.

Filter Builder: Click on the Filter Builder to open a filter area at the top of the Contact Search to enter criteria and save the criteria as a filter.
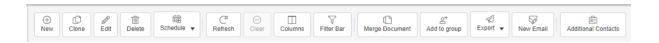
Add to Group: Checkmark contacts from the list and click on Add to Group to add them to an existing GoldMine Group or create a new GoldMine Group.

Export: Click Export to export selected contacts. Options for export include CSV, Excel and PDF. This option is dependent on GoldMine permissions.

New Email: Click on New Email to start a draft email to selected contacts.

Additional Contacts: Use the **Additional Contact** button to switch to searching Additional Contacts.
NOTE: When searching for Additional contacts, the button will be displayed as **Primary Contacts**.
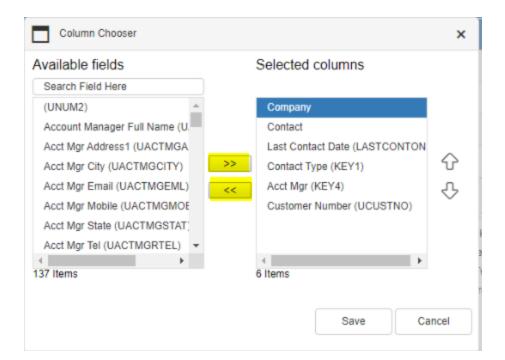
The fields in the **Contact Search** can be customized using the **Columns** button on the **Contact Search** menu bar as highlighted on the left.
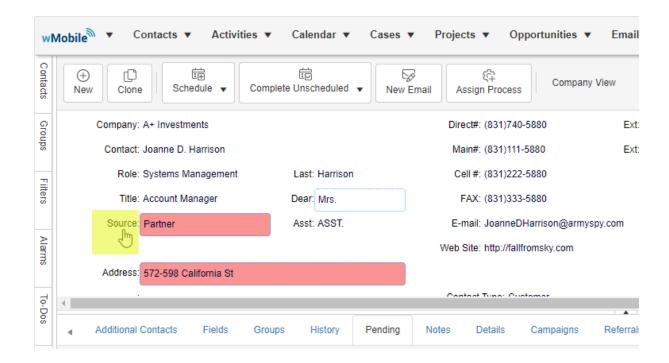
Select the field to add to the search criteria and use the **>>** button to add it as a column in the **Contact Search** pane.

To remove a field, use the **<<** button to return it to the list of available fields.
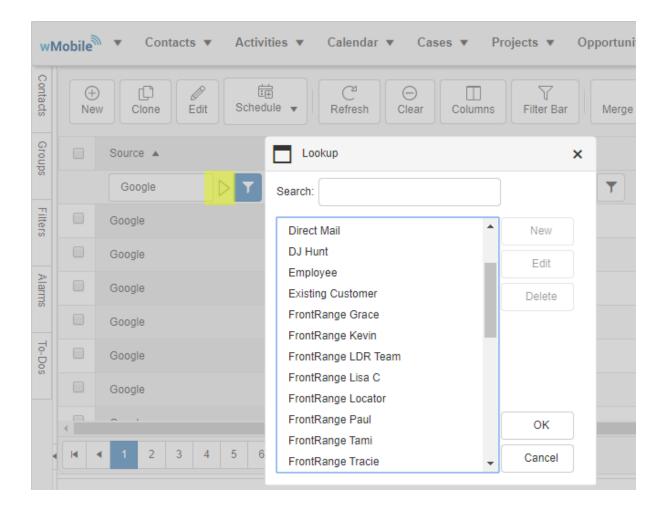
6.5.3   Label Search

wMobile Desktop supports the same type of label search as GoldMine Premium Edition. Click on a label such as Company, Contact, Source, State, Acct Manager etc. to bring up a search on that field. Source is used in the example below.
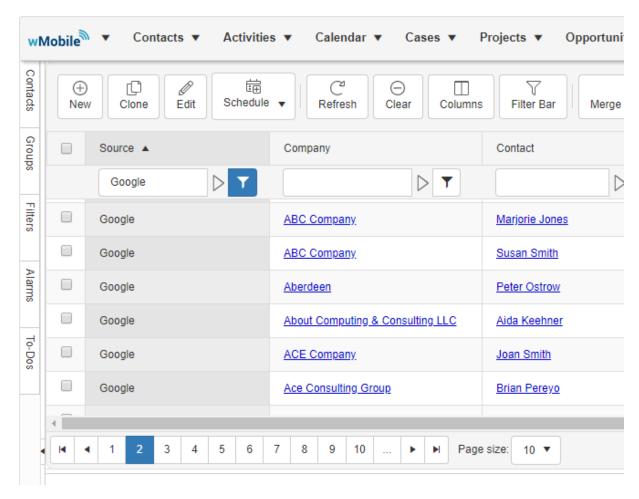
Click on the arrow sign to the right of the field to see the lookup list. Enter your search value(s). If you have a lookup list for the field in GoldMine, it will be available for selection in wMobile.

The search results will be listed below the criteria. Select the appropriate company or contact to bring up contact details.
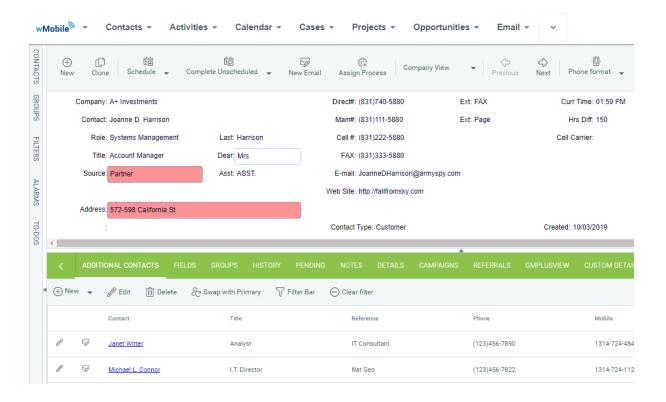
Click here for other options available on the Contact Search menu.

6.6 Working with Contact Details

Once a contact has been selected, the Contact details can be viewed and updated. The top part of the contact window will display contact information as it does in GoldMine. The bottom part of the screen will display tabs such as Additional Contacts, Pending, History, etc as you see in GoldMine.
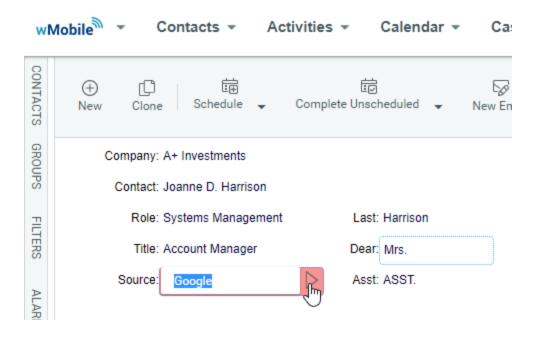
wMobile Desktop supports GoldMine Record Typing.

Click in a field to update the information.
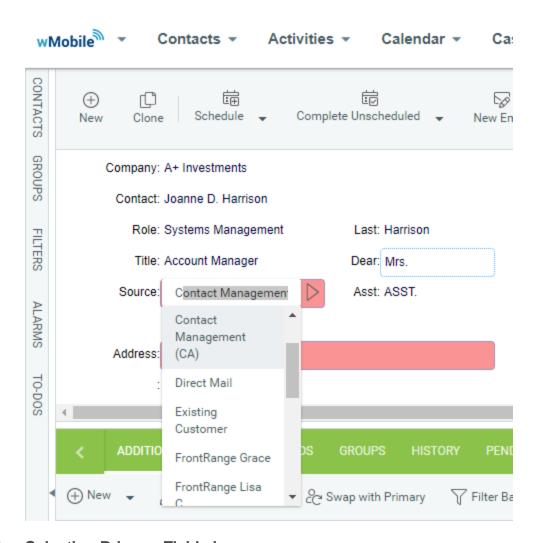
Any field that has a drop-down list in GoldMine will have the same drop-down list in wMobile for selection.

Click on the arrow sign of the right the field, to view the selection list.

Select the appropriate value from the list to update the field.
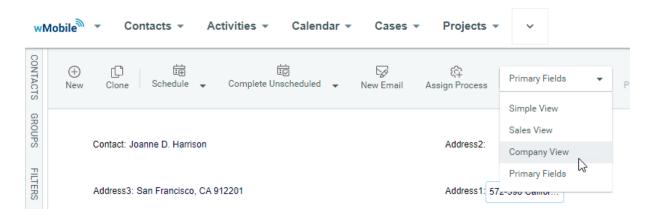
See the sections below for editing tab information.

6.6.1 Selecting Primary Field view

If you use primary field views in GoldMine, these will be available for selection in wMobile Desktop from the Primary Fields drop-down list pictured here.

You can set a default primary view in the User Options.

6.6.2   Using the Splitter Bar on the Contact Screen
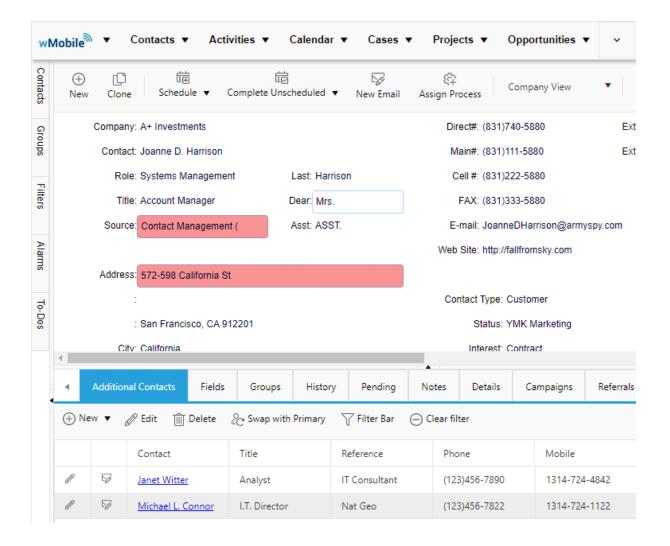
You might want to adjust the splitter bar between contact information on the top have of the contact screen and the tab information on the bottom half of the screen. Move your cursor over the separation bar until you see the up and down arrow as pictured on the left. Then drag the splitter bar up or down as needed.
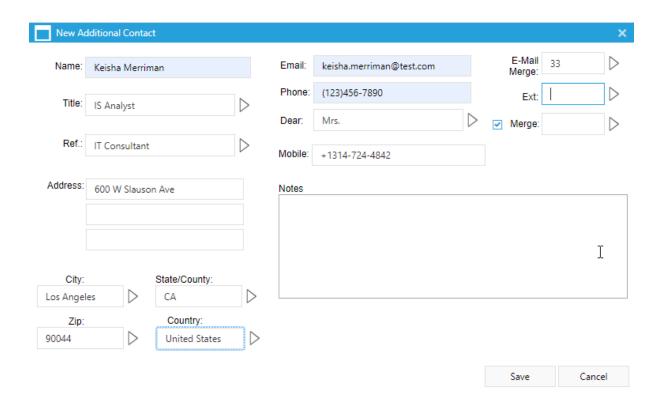
6.6.3   Additional Contacts Tab

Secondary or additional contacts can be seen under the **Additional Contacts** tab of the contact screen.

Note that the names are underlined and in blue. They are hyperlinks that can be clicked on to bring up further details.

Information can be viewed or updated. If changes are made, click on **Save** to preserve the changes or **Cancel** to close the window without preserving any changes.

There are options on the toolbar at the top of the **Additional Contacts** tab.
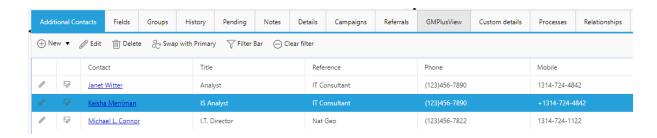
Click **New** to create a New additional contact.
Click **Edit** to edit the highlighted contact.
Click **Delete** to delete the highlighted contact.

Swap with Primary: This option swaps the additional contact with Primary.
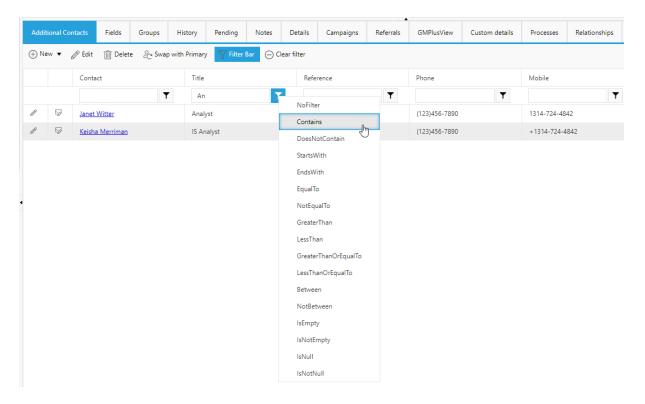
NOTE: If these options are not present, then your security does not permit it. These options can be restricted in the wMobile Manager Console.

Filter bar: Use the filter bar to filter the list of additional contacts by contact name, title, reference or phone number. The standard list of comparisons is available as pictured to the right.
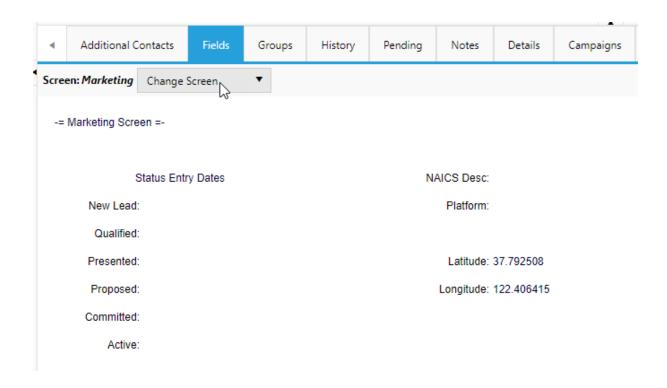
Only additional contacts that meet the criteria will be displayed until the criteria is removed.

Clear filter: Clears the filter criteria.
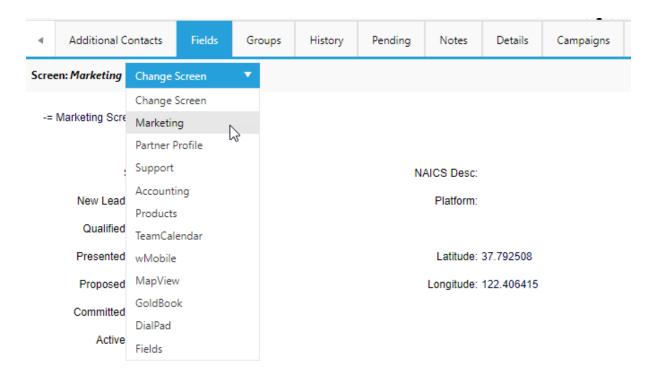
6.6.4   Fields Tab
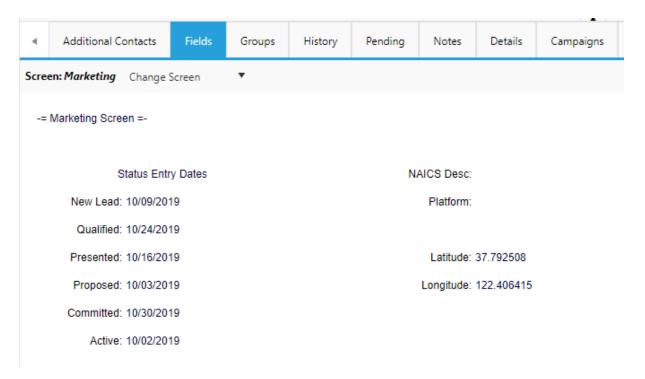
If you have custom field views in GoldMine, they will be accessible in wMobile Desktop as well under the Fields tab.

If you have more than one field view in GoldMine, these can be accessed from the **Custom Screens** button. Select the field view from the drop-down list.
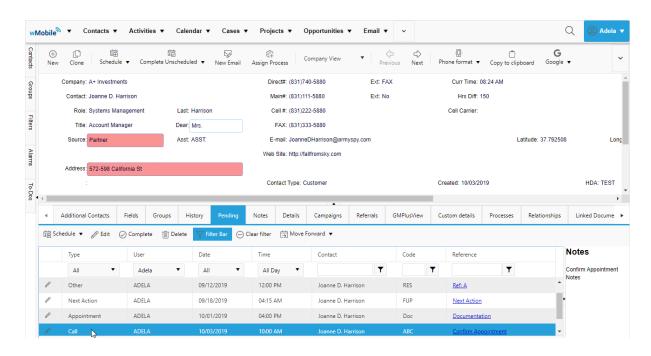
The selected field view will be displayed. A default field view can be selected in User Options.

6.6.5 Pending Tab
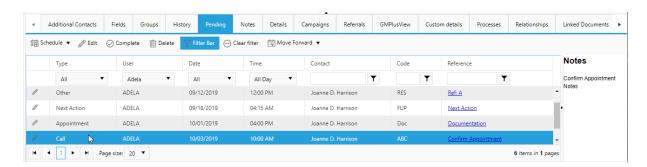
Pending activities will be displayed under the **Pending** tab. To set the sort order, see Activity Options.
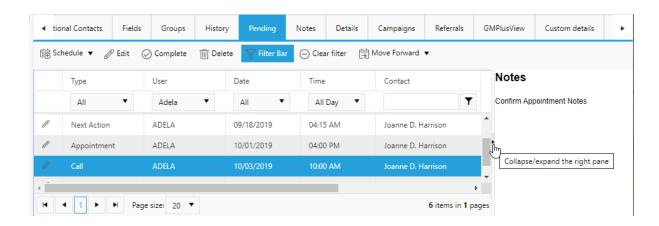
Pending toolbar.

- Click [Schedule](#) to create a new pending activity.
- Click [Edit](#) to edit the highlighted activity.
- Click [Complete](#) to complete the highlighted activity.
- Click [Delete](#) to delete the highlighted contact.
- Click [Move Forward](#) to move the activity forward. The selection options include 1 Day, 7 Days, 14 Days, 21 Days, 30 Days, 60 days, 90 Days or select a date from the calendar..
- Click [Filter Bar](#) to add the field filtering choices on Type, User, Date, Time, Contact and Reference.
- Click [Clear filter](#) to clear all filter criteria.

NOTE: If these options are not present, then your security does not permit it. Some of these options can be restricted in the wMobile Manager Console.
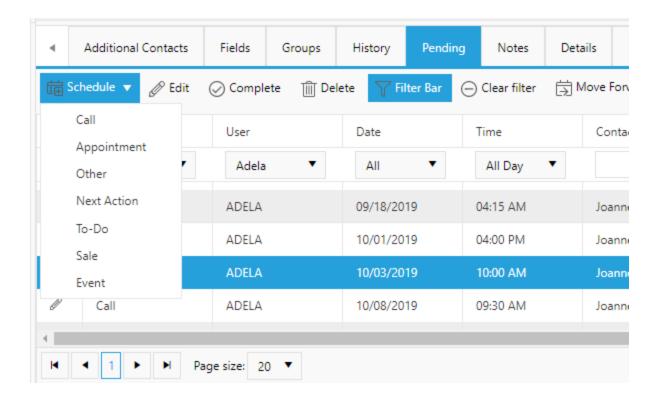
Notes display can be toggled on or off using the toggle button at the right of the Pending tab.
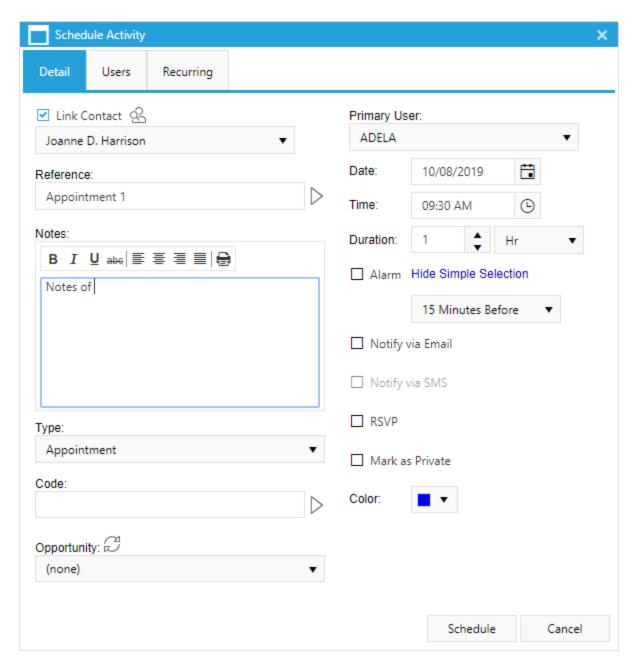
6.6.5.1   Schedule a Pending Activity

On the **Pending** tab, highlight the activity to edit and click on the **Schedule** button on the toolbar and select the type of activity to schedule: Call, Appointment, Other, Next Action, To-Do, Sale or Event.
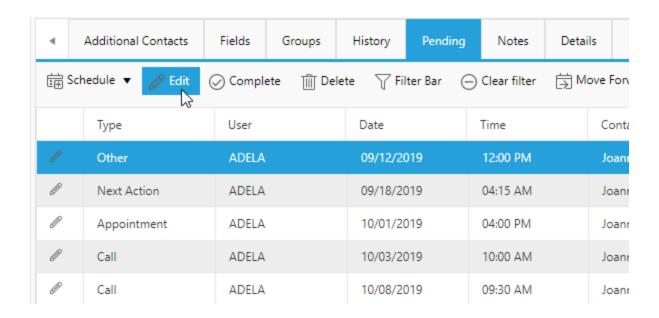
The activity will come up in a separate window. Edit the fields as needed or add activity notes. Click **Save** to preserve any changes. Click **Cancel** to close the activity without preserving changes. Note the **Users** tab to select additional users or groups for an activity. Note the **Recurring** tab to select Recurring activities.

Schedule Activity   ✕

| Detail | Users | Recurring |

☑ Link Contact 👥

| Joanne D. Harrison ▼ |

Reference:

| Appointment 1 | ▷

Notes:

B *I* U̲ a̶b̶c̶ | ≣ ≣ ≣ ≣ | 🖶

| Notes of | |

Type:

| Appointment ▼ |

Code:

| | ▷

Opportunity: 🔁

| (none) ▼ |

Primary User:

| ADELA ▼ |

Date: | 10/08/2019   📅 |

Time: | 09:30 AM   🕐 |

Duration: | 1 ▲▼ | | Hr ▼ |

☐ Alarm   Hide Simple Selection

| 15 Minutes Before   ▼ |

☐ Notify via Email

☐ Notify via SMS

☐ RSVP

☐ Mark as Private

Color: ■ ▼

| Schedule | | Cancel |
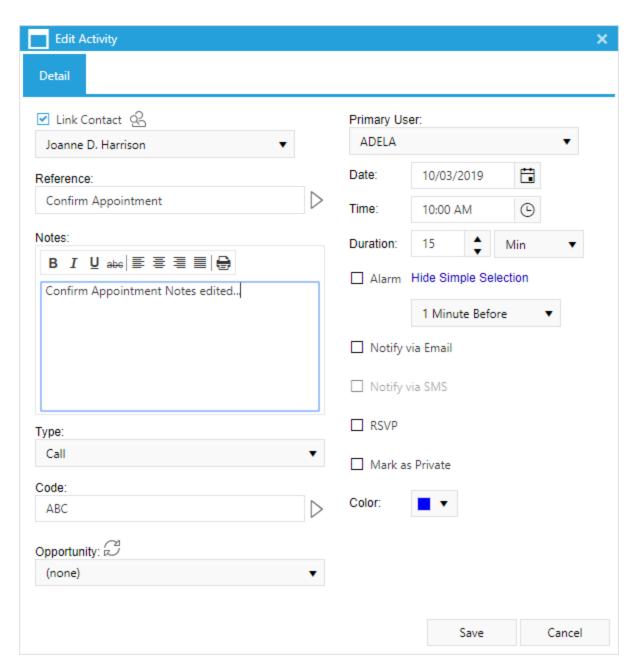
6.6.5.2 Editing a Pending Activity

On the **Pending** tab, highlight the activity to edit and click on the **Edit** button on the toolbar.
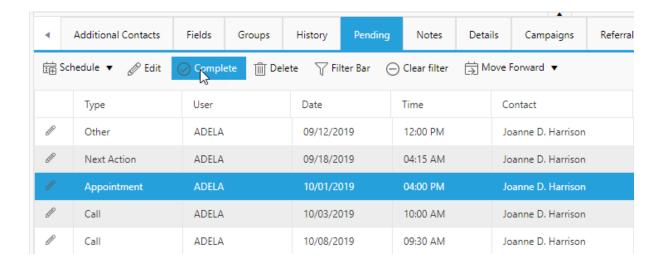
The activity will come up in a window. Edit the fields as needed or add activity notes. Click **Save** to preserve any changes. Click **Cancel** to close the activity without preserving changes.
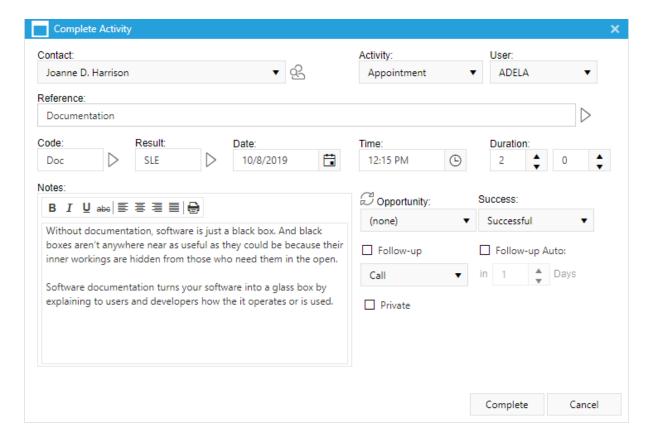
6.6.5.3 Complete a Pending Activity

On the **Pending** tab, highlight the activity to complete and click on the **Complete** button on the toolbar.
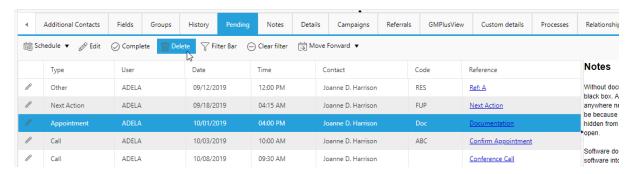
The activity will come up in a window. Edit the fields as needed or add activity notes. Click **Complete** to complete the activity. Click **Cancel** to close the window without completing the activity.

6.6.5.4   Delete Pending Activity

On the **Pending** tab, highlight the activity to delete and click on the **Delete** button on the toolbar.
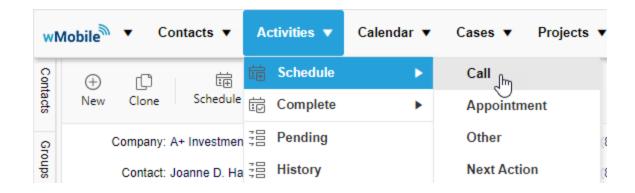
NOTE: This option might not be available depending on security settings.
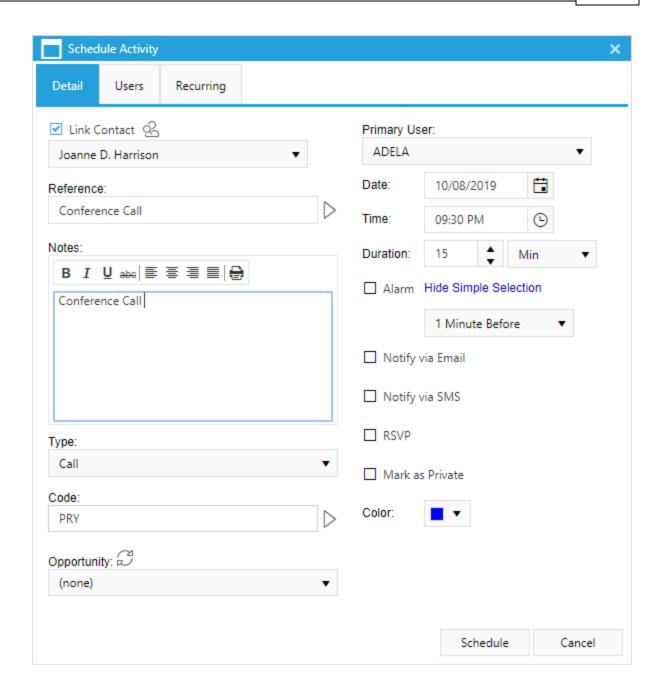
6.6.5.5   Recurring Activities (Desktop)

Creating a Recurring Activity in wMobile Desktop

To start, find/select a contact to create a recurring activity for.
From the toolbar, select: Activities > Schedule > Call

The **Schedule Activity** dialog opens. Here is a screenshot of the **Detail** tab already populated by a user (these values will be used in examples):
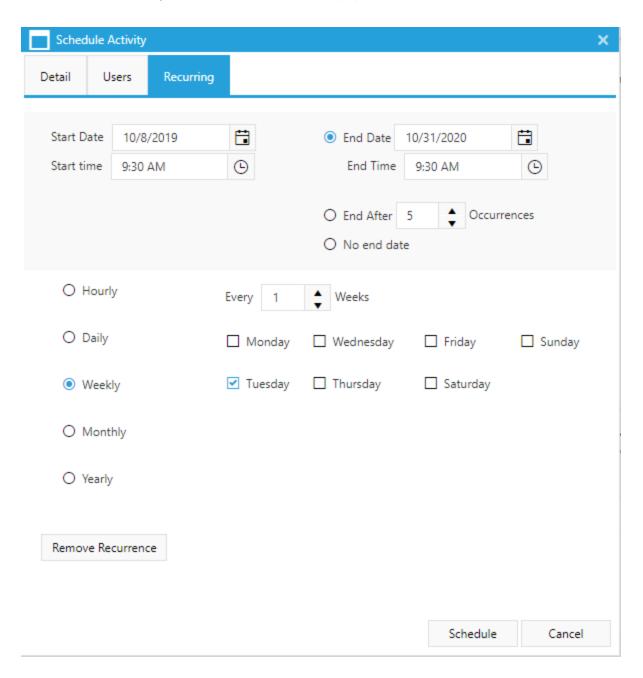
The call's **Reference** value is "Conference Call" and the calls are scheduled to start on at 9:30 AM with a duration of 15 minutes. In this example we want to meet "Tuesdays" of every week starting on 10/8/2019. Notes were added to remind users of the meeting's topics and a Code (PRY) was set. (NOTE: PRY = Priority; you may use any code you wish from your system.)

Other Options to Set:

You may optionally (as shown in dialog above) link the activity to an Opportunity or a Case, set an Alarm, Notify via Email, Notify via SMS, Auto-generate RSVP, Mark as Private, and set a Color value. The Primary User (ADELA in this example) may be changed if you are scheduling this for a user other than yourself. The Users tab allows you to set the activity for multiple users. In this example, we left this set only for ADELA as the Primary User.

The **Schedule Activity** dialog's **Recurring** tab is populated:

Above, the dialog shows how to setup the calls to be scheduled:
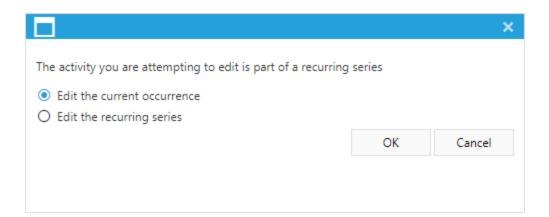
- Start Date = 10/8/2019; End Date = 10/31/2019 (totaling a year's worth)

- Start time = 9:30 AM (the time to meet; the Duration was set previously)

- Occurs = Weekly

- Repeats = Every week (user for every week; no skipping in this example)

- By Day of the Week = Tuesday

Finally, to create the series of recurring calls, click the **Schedule** button.

On the Pending tab, we see they were created (only three shown here):

	Call	ADELA	10/08/2019	09:30 AM	Joanne D. Harrison	PRY	Conference Call
	Call	ADELA	10/15/2019	09:30 AM	Joanne D. Harrison	PRY	Conference Call
	Call	ADELA	10/22/2019	09:30 AM	Joanne D. Harrison	PRY	Conference Call

When the Reference link for one of these recurring activities is clicked on, wMobile Desktop will display this dialog:
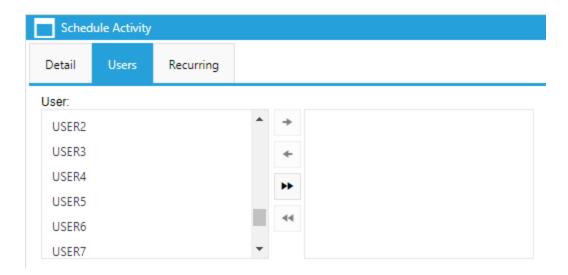
The user has the option to edit either the "current occurrence" or the "recurring series" of activities by selecting one of the radio buttons in the dialog presented (see above). Note: The "current occurrence" is activity that was clicked within the list. After clicking **OK**, the **Edit Dialog** opens where edits to the activity can be made and saved (or activities of the entire series).

If an activity is to be deleted the user will be prompted to delete the "current occurrence" or the "recurring series". The dialog is similar to the one displayed prior to editing.
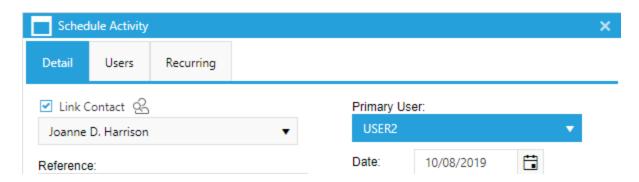
The Users Tab

When creating recurring activities, more than one user can be added to the activity. This is accomplished using the **Users** tab.
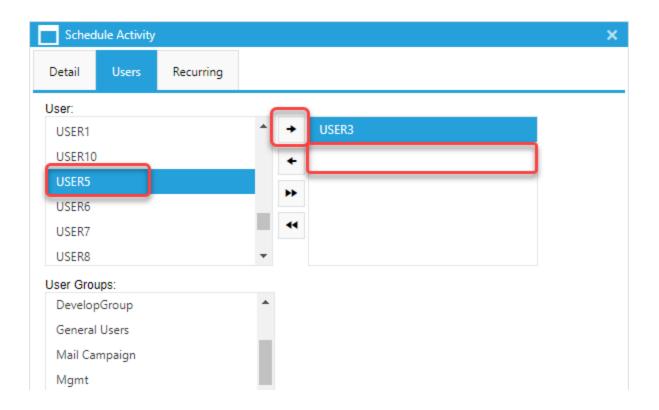
Here is a screenshot of the **Users** tab in wMobile Desktop:

NOTE: The **Primary User** linked to the activity is set on the **Detail** tab:

Other users can be added to the activity by selecting them in the **User** list and clicking the arrow pointing to the right (see the following screenshot). Repeat as necessary to add the users to the activity. The opposite can be performed to remove a user from the list on the right once it's populated. There are also buttons for adding or removing "all" of the users at one time from ether list using the >> and << buttons. In wMobile Desktop, a user can add the members of a **User Group** by selecting that group from the **User Groups List** and using the right arrow.

> ⚠ **IMPORTANT: Editing Recurring Activities (Special Notes for Behavior Based on GoldMine Versions)**
>
> The user has the option to edit either the "current occurrence" or the "recurring series" of activities. However, please note that users running different versions of GoldMine will have different capabilities:
>
> **GoldMine 9.x and higher:**
> Users running GoldMine 9.x and higher will be able to edit the recurring details (i.e., the start/end dates/times) as well as the activity details such as reference, activity code and notes.
>
> **GoldMine 8.x, 7.x, and 6.x:**
> Users running GoldMine 8.x, 7.x, and 6.x will only be able to edit the activity details such as reference, activity code and notes. The recurring tab will not be displayed for editing the recurring details (i.e., the start/end dates/times).

6.6.5.6   Move Forward
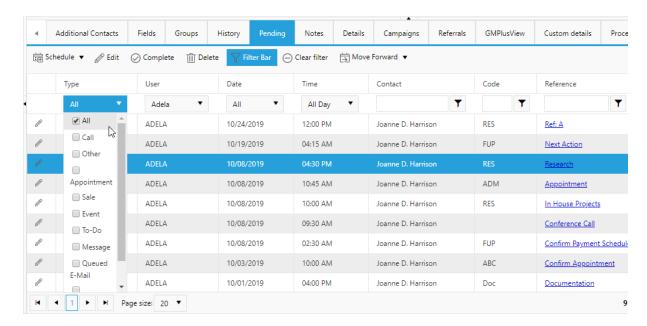
On the **Pending** tab, highlight the activity and click on the **Move Forward** button on the toolbar. Select the number of days to move the activity forward: 1, 7, 14, 21, 30, 60 or 90 days or select a date from the calendar.

6.6.5.7   Filter Bar

The **Filter Bar** can be used to filter the displayed activities. Use the drop down lists for Type, User, Date, and Time or type the value into Contact, Code, or Reference fields to limit the displayed activities.

The **Clear Filter** can be used to clear the filter criteria**.**
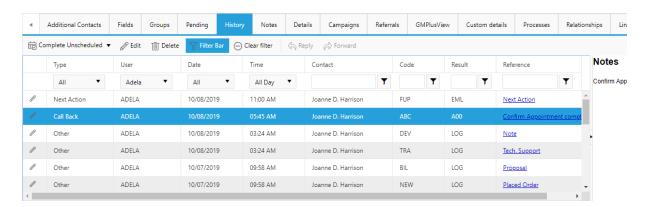
6.6.6   History Tab

History activities will be displayed under the **History** tab. To set the sort order, see Activity Options.
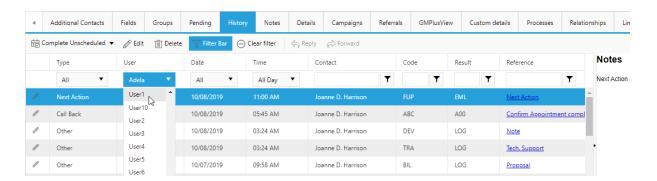
History toolbar:

- Click **Complete Unscheduled** to complete an activity that was not previously scheduled.
- Click Edit to edit the highlighted activity.
- Click Delete to delete the highlighted contact.
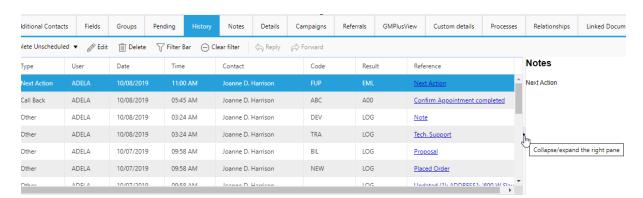
NOTE: If these options are not present, then your security does not permit it. Some of these options can be restricted in the wMobile Manager Console.

The **Filter Bar** can be used to filter the displayed activities. Use the drop down lists for Type, User, Date, and Time or type the value into Contact, Code, or Reference fields to limit the displayed activities. The **Clear Filter** option can be used the clear all filter criteria.
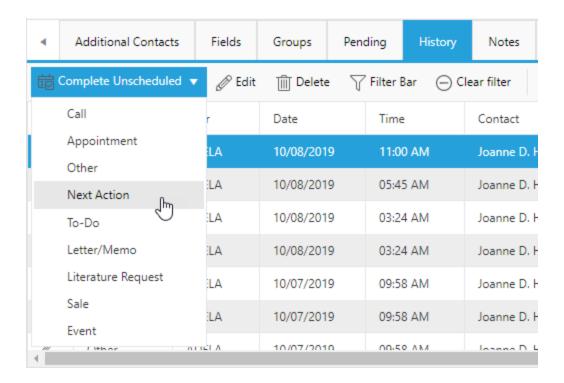
Notes display can be toggled on or off using the toggle button at the right of the History tab.
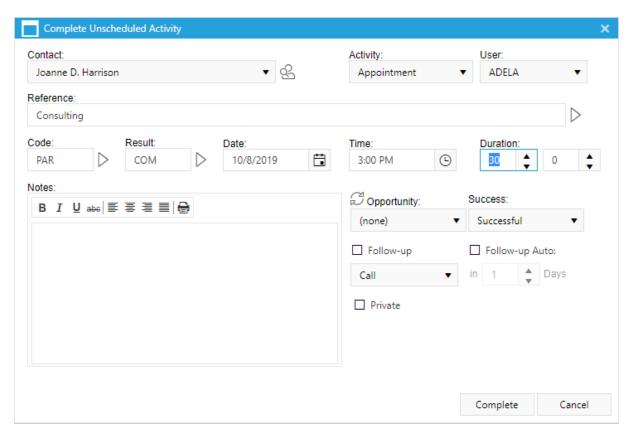
6.6.6.1   Complete Unscheduled

Click on **Complete Unscheduled** and select the type of activity from the drop down list to complete an activity that was not previously scheduled.
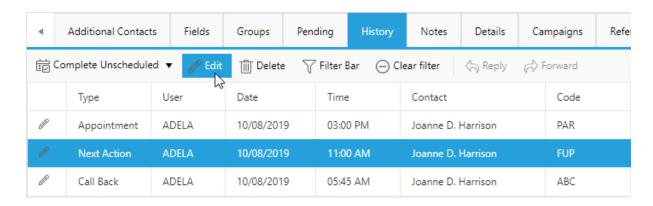
The activity will come up in a window. Edit the fields as needed or add activity notes. Click **Complete** to complete the activity. Click **Cancel** to close the window without completing the activity.
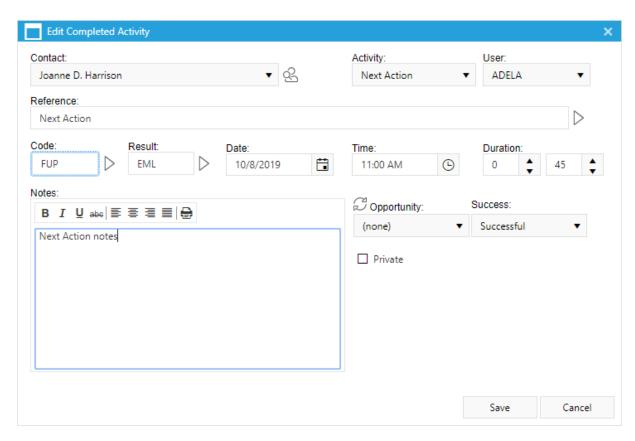
6.6.6.2   Edit History Activity

On the **History** tab, highlight the activity to edit and click on the **Edit** button on the toolbar.
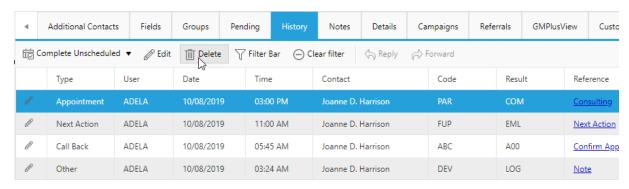
The activity will come up in a window. Edit the fields as needed or add activity notes. Click **Save** to preserve any changes. Click **Cancel** to close the activity without preserving changes.

6.6.6.3   Delete History Activity

On the **History** tab, highlight the activity to delete and click on the **Delete** button on the toolbar.
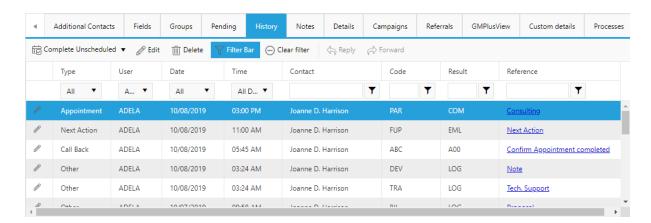
NOTE: This option might not be available depending on security settings.

6.6.6.4   History Filter Bar
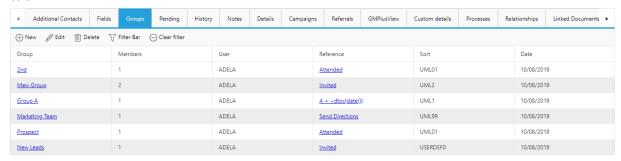
The **Filter Bar** can be used to filter the displayed activities. Use the drop down lists for Type, User, Date, and Time or type the value into Contact, Result Code, or Reference fields to limit the displayed activities.

The **Clear Filter** can be used to clear the filter criteria.

6.6.7   Groups Tab

If a contact is a member of a GoldMine group, the group will be displayed under the Groups tab.
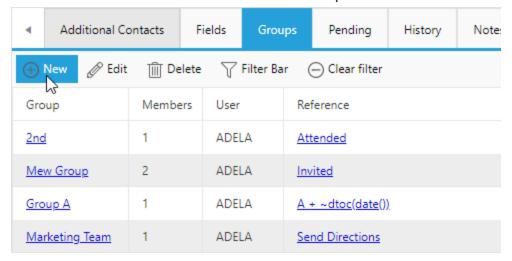
The menu bar includes the following options:
New, Edit, Delete, Filter Bar, and Clear Filter.
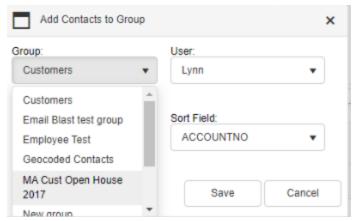
6.6.7.1   New Group

Use the New button to add the contact to a Group.
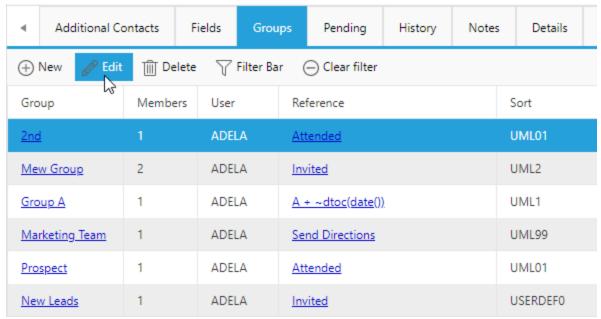
Select the Group from the list. The other settings are inherited from the Group. Select **Save** to add the contact to the new Group.
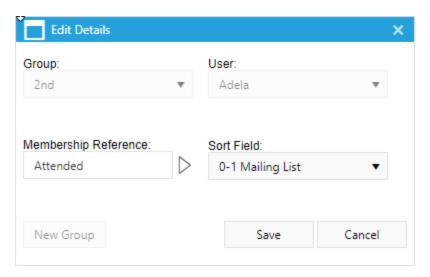
6.6.7.2   Edit Group

Select **Edit** to edit the Group membership settings.
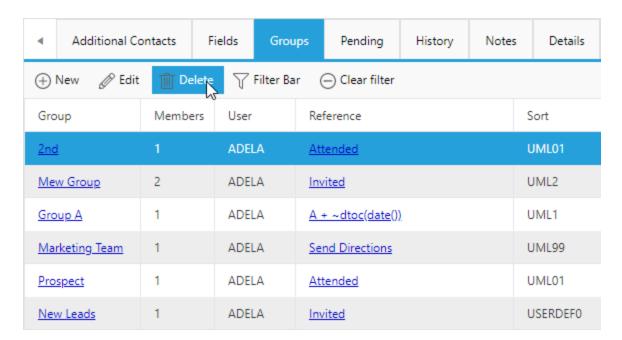
Update settings such as the Membership Reference.
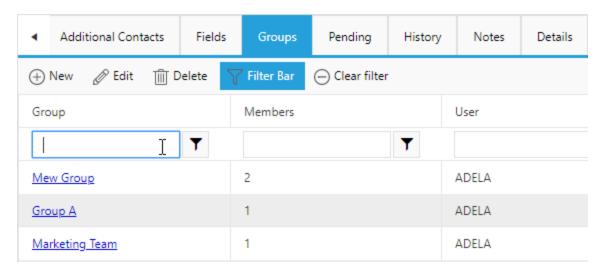
6.6.7.3 Delete Group Membership

Click on **Delete** to remove the contact from the selected Group. The Group will still exist with its other members.
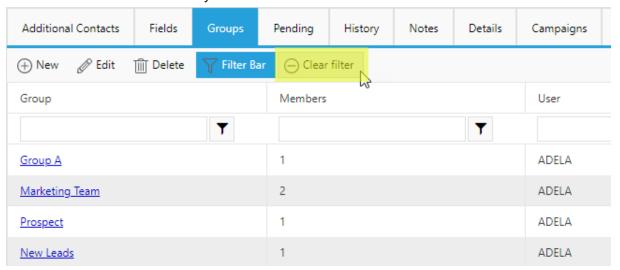
6.6.7.4 Group Filter Bar

Select **Filter Bar** to activate the filter bar. Filtering options include name, members and user.

6.6.7.5   Clear Group Filter
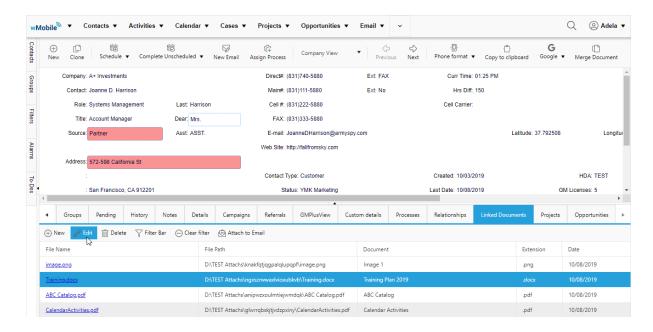
Select **Clear Filter** to clear any entries in the filter bar.
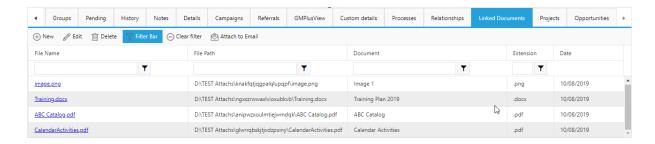
6.6.8   Linked Documents Tab

Documents that are linked in GoldMine such as email attachments, merged documents and manually linked documents can be accessed under the **Linked Documents** tab. Click on Edit or double-click on the file name to open a document. Documents uploaded in wMobile will be in folders with unique folder names. A document can be deleted, if user permissions permit.

Attach to Email
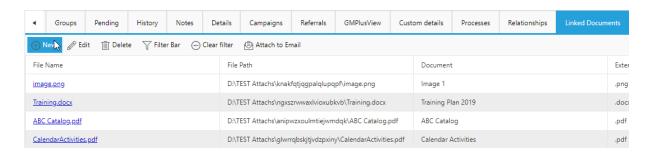
Click on the **Filter Bar** button on the Linked documents toolbar to filter the list of documents. A user can filter on File Name, File Path, Document or Extension. In the example below, only linked documents with .pdf extensions are displayed.

See the topic on .
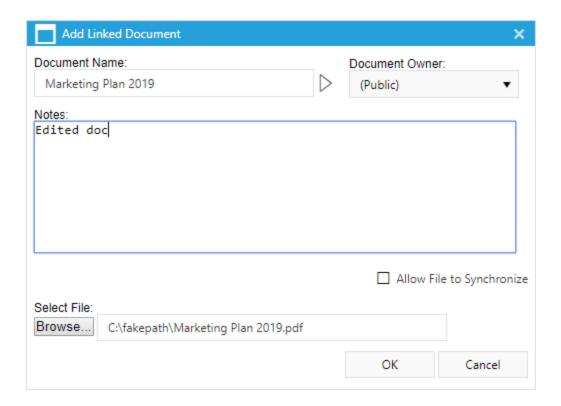
6.6.8.1 Uploading a Linked Document
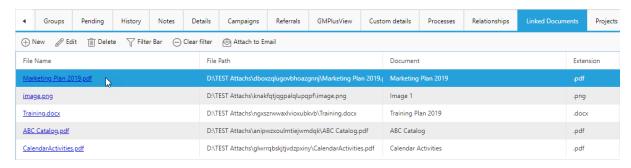
To Upload a new linked document, navigate to the Linked Documents tab of the appropriate GoldMine record. Select the **New** button on the toolbar.

The user will enter the document name, add any notes, and browse to the location where he saved the edited file. click **OK** to add.

The uploaded document will be accessible to others in wMobile Desktop. As noted previously, the file path uses an algorithm to ensure a unique folder name.

6.7   Document Merge

It is possible to merge a letter for single GoldMine contact, or to produce a letter for multiple recipients. See the links below:
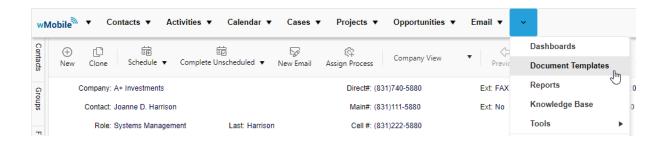
📄 Create a Document Merge Template
📄 Single Document Merge

📄 [Multiple Recipient Document Merge](#)
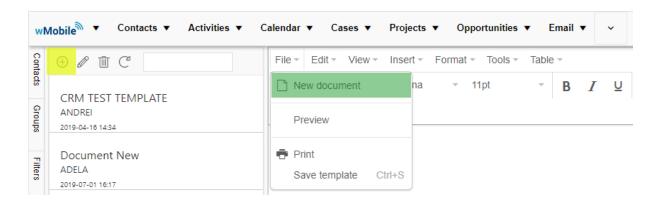
6.7.1   Create Doc Merge Template

Document templates can be created for use in merging letters with a single contact or multiple contacts. These templates are separate from any templates created and used in GoldMine.
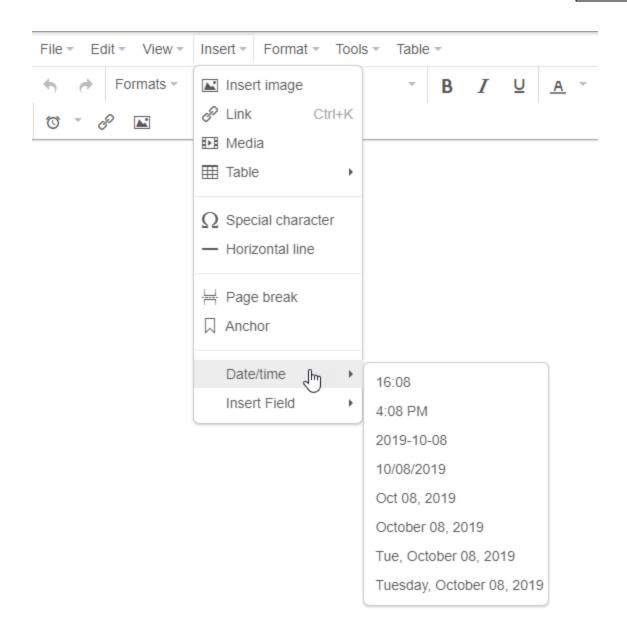
Select **Documents Templates** from the the expanded menu.
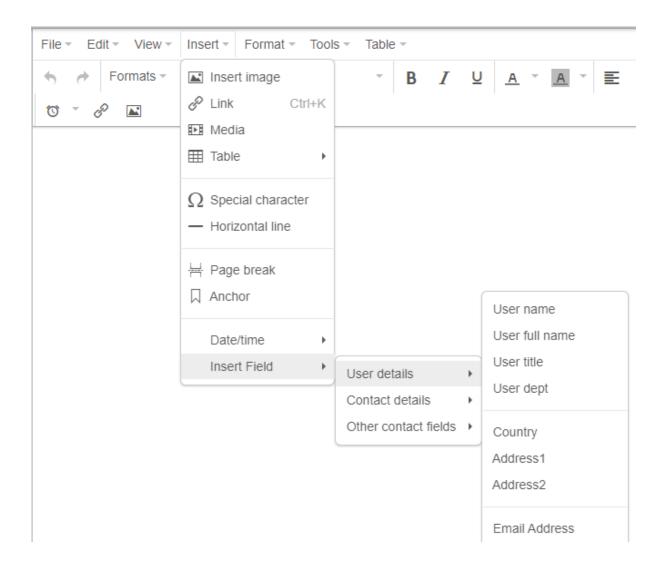
Select the "+" sign to create a **New** document template as highlighted here in yellow. Or select **File** and **New document** as highlighted in green.
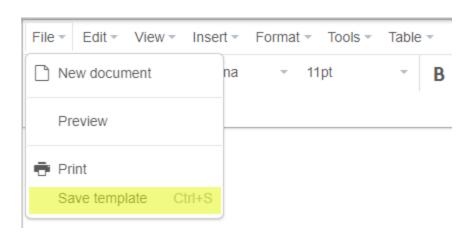
Create the document template. A date can be inserted from the Insert menu. Select the date format of your preference.
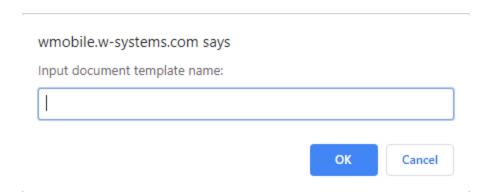
GoldMine fields can be inserted, such as the Name, Title and Address.

When the letter is completed, select **Save Template** from the **File** menu.
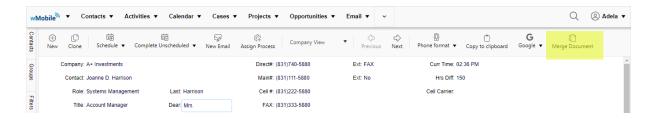
Give the template a descriptive name and click **OK**. It will then appear on the list of templates.
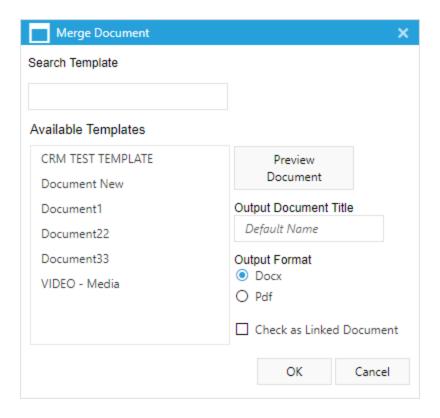
6.7.2   Single Document Merge

Select your contact and use the **Merge** button.

Select the template from the list. Give the document a descriptive name. If the user needs to edit the document, select Docx (or Pdf) as the Output format and select the option to Check as Linked Document. There's an optional button to Preview the linked doc. Click **OK**.
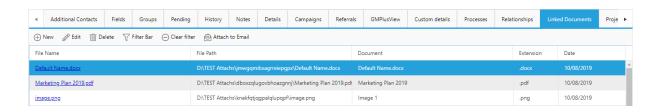
The user will be prompted to **Open** or **Save** the document.

The saved document will be listed under the Linked Documents tab. The file path uses an algorithm to ensure a unique folder name as shown below.

The user can open it from the Linked Docs tab. He can either click **Edit** or double-click on the file name to open the file.
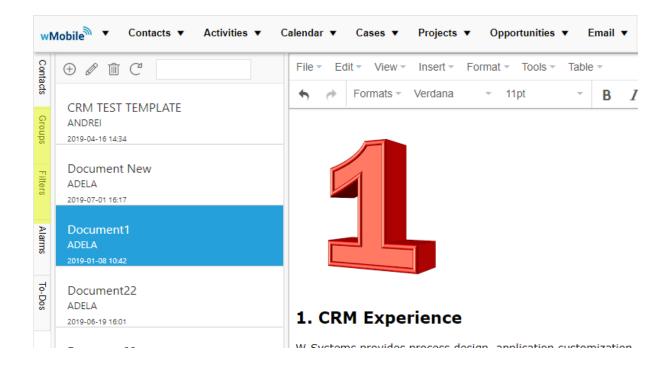
If the user selects **Open** at the prompt, it will be opened in Word.

The user would then need to save the document somewhere he has access on his computer or the server when done editing. wMobile will NOT automatically save the edited copy. The updated document would need to be uploaded as any other new document.
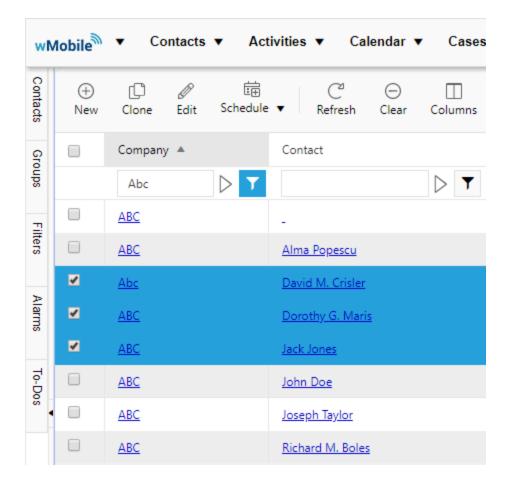
See the topic on [Uploading a Linked Document](#).

6.7.3   Multiple Recipient Document Merge
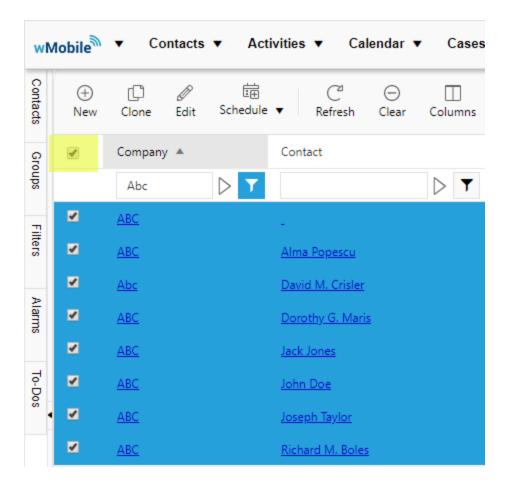
To merge a letter for multiple recipients, a user can select a filter or group from the side bar.
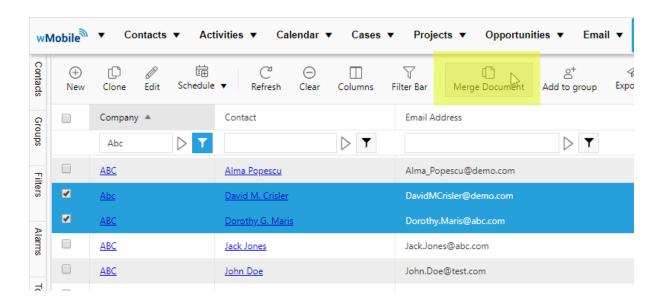
A user can enter search criteria to locate the desired records.
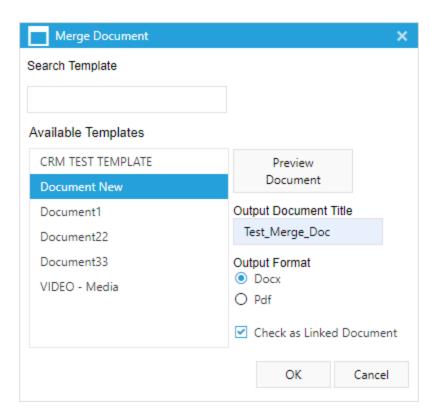
In either case, the user can checkmark individual records as shown above, or use the checkbox in the upper left to select all records.

Once the selection is made, select **Merge Documents** from the toolbar.

Select a template from the **Available Templates** list. The user should give a descriptive name for the **Output Document Title**. The user can select to create the document as "docx" or "pdf" for the **Output Format**. If desired, checkmark the **Check as Linked Document** option so that a copy will be stored under the **Linked Documents** tab of each selected account.
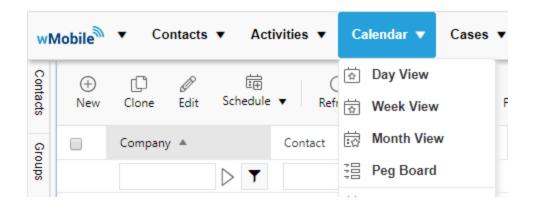
The user will be prompted to **Open** or **Save**. In either case, a copy will be saved under the Linked Documents tab, if this option was checked. In either case, the document will be linked to each selected record under the Linked Documents tab, if that option was checkmarked.
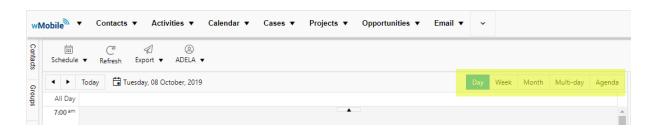
6.8   Working with the Calendar

wMobile Desktop provides a view of the user's calendar in Day, Week, Month, Multi-day or Agenda views. There is an individual user calendar and a Multi Calendar to view several user's calendars at the same time.

Select from the Calendar menu to view **Day View**, **Week View**, **Month View**, or **Peg Board**.
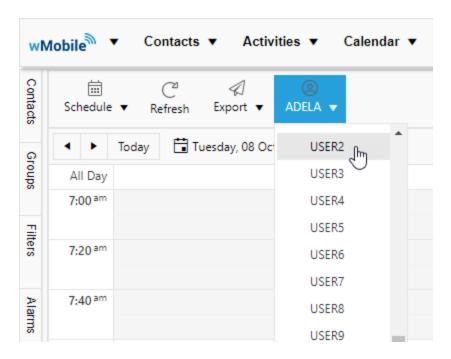
From the calendar, the user can also change the time-frame by clicking on **Day**, **Week**, **Month, Multi-day, Agenda** as highlighted below.
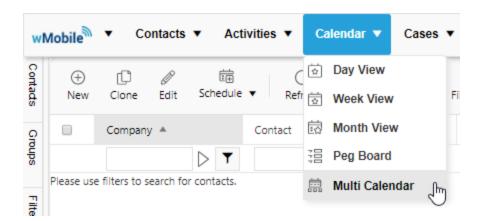
The user's calendar to be displayed can be selected from the drop-down list as pictured below.

NOTE: The ability to view others' calendars will be dependent upon these settings in GoldMine. If the user does not have the ability to view others' calendars in GoldMine, they will not be able to do so in wMobile either.
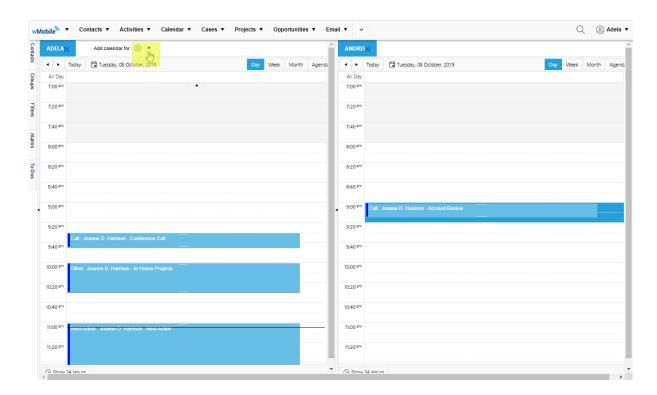
6.8.1 Multi Calendar
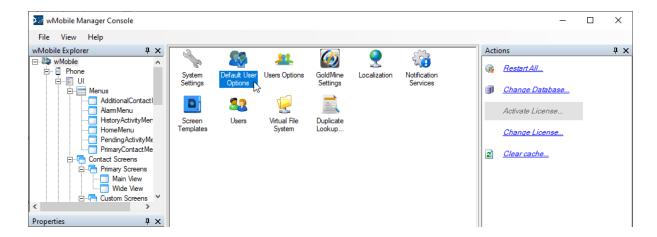
The **Multi Calendar** can be accessed from the **Calendar** menu.
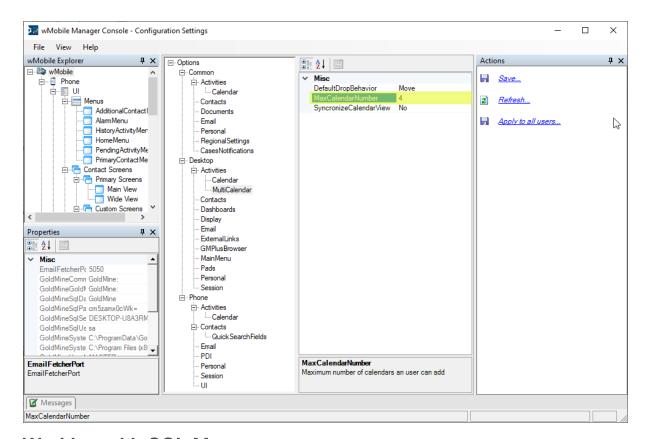
To view another user, click the arrow sign and select the user from the list. You'll then see the user's calendars side by side.

If the administrator wishes to adjust the default number of calendars that can be viewed at once, that is set in the [wMobile Manager Console](). Select **Default User Options**.

In the **Desktop** section, expand **Activities**. Select **MultiCalendar**, then the **MaxCalendarNumber** as highlighted below. The default is 4 but can adjusted higher or lower.

6.9   Working with SQL Manager

wMobile has some excellent built in searching tools allowing you to get to your data fast. There are other times we need to sift through data using very specific filtering. You might want to see if certain data exists; or does not exist. Maybe you need a list of which customers are in a certain state (or multiple states) and even sort the data how you need to view it. Building and using SQL queries may be just the solution for you. In wMobile Desktop, you can use the SQL Manager to create, run, and save your SQL queries. After running a query, the results may be exported to a CSV (Comma Separated Value) or Excel file.

A note about SQL:
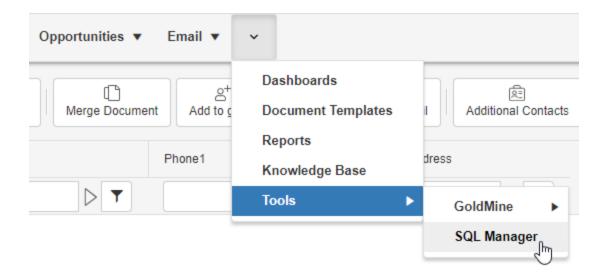
SQL is pronounced "ess-cue-ell" or "sequel" depending on the source and is the acronym for: Structured Query Language. There is a lot of great information on the web about SQL and this might be just the ticket you need to get your data exactly how you want it. In a nutshell, SQL is a language that includes elements you use to build queries. Once written, a query is executed against your database and then returns data to you, your way. Your query can be very simple (listing all the contacts in your database) or very complicated (returning only contacts in your database created after a specific date you specify, these contacts do not have a primary email address assigned, and they also must have a

specific Account Manager). To wrap up what SQL is, it's a way of communicating with the database. Our query asks for data and then the database gives it to us.
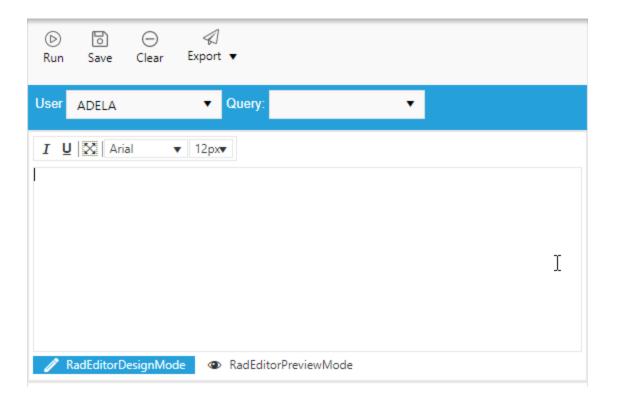
SQL Manager
To configure [SQL Queries Manger](#) go to Manger Console > Desktop > SQL Queries Manager.

The interface for writing and using SQL queries is the **SQL Manager**. In wMobile Desktop, from the expanded menu select **Tools > SQL Manager**:

The SQL Manager interface:

SQL Manager Tools:

Run - Runs the query contained in the editing area.
Save - Allows you to save (or update) the current query.
Clear - Clears the query editing area.
Export - Allows the results returned from a query to be saved as a CSV or Excel file.
User (drop-down) - List of GoldMine users.
Query (drop-down) - List of saved queries for the user selected in "User" drop-down.

> 📖 **NOTE**: There is also as set of font formatting tools to use as needed but please note that font formatting has no effect on SQL queries.

To use the **SQL Manager**, type your query in the editor area and click the **Run** command. Your results will display in the area below the query editing area:
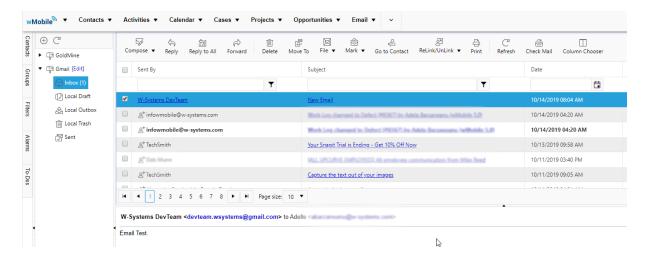
COMPANY	CONTACT	LASTNAME	TITLE
ABC	Jack Jones	Jones	
ABC	Alma Popescu	Popescu	Assistant Director
ABC	Dorothy G. Maris	Maris	Chief Technology Officer
ABC	Joseph Taylor	Taylor	Business IT Manager
ABC	John Doe	Doe	IT Manager
ABC	Richard M. Boles	Boles	Analyst
ABC Network	Carol Smith	Smith	VP of Sales

6.10 Working with Email

wMobile can be used to send and receive email. Any email received in wMobile will be linked in the GoldMine History. Any email sent from wMobile will be displayed in the GoldMine History. (This is dependent on there being a matching email address in GoldMine.)
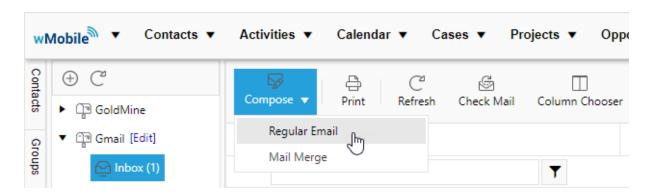
Multiple accounts can be configured if needed. In the screen shot below, two accounts are configured (GMail and Outlook 365) and the GoldMine Inbox is also displayed. Many GoldMine users auto-retrieve emails from their server or Internet Service Provider (ISP) mailbox into the GoldMine Inbox. wMobile does not yet have this functionality. So, wMobile users should close GoldMine when they leave the office. They'll be able to view newly received emails on the server or ISP mailbox. They'll access the GoldMine Inbox for any emails previously retrieved into GoldMine.

Select Email from the wMobile toolbar to navigate to the Email Center.
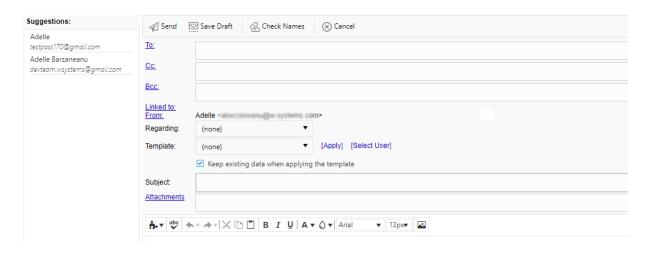
6.10.1 Compose Email
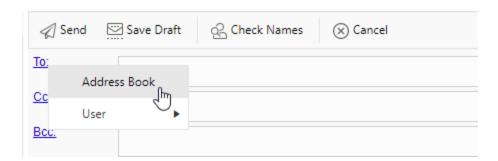
Use the **Compose** button on the toolbar to compose a new email message. Select **Regular Email** for a single email.
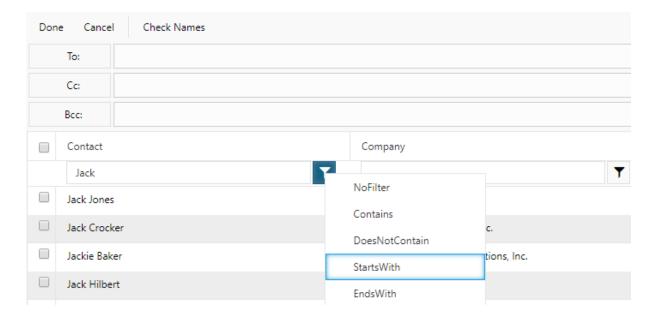
A list of most recent recipient email addresses will be listed on the left, available for selection. Double-click on the email address in the list to select it.

Click on **To** and **Address Book** to search for other email addresses.

Type in the search criteria. Click into another field or use the filter icon to select the comparison type. The default is **Starts With**.
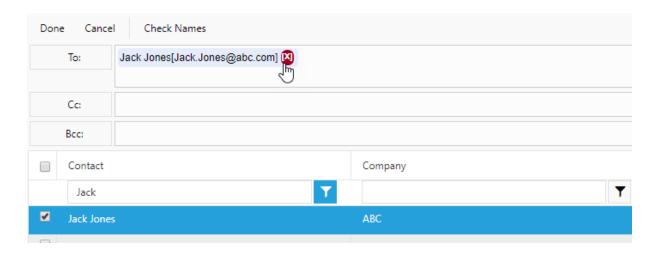
Click on a contact name to add to the list. (Note: If you click on the company, that's a hyperlink that will take you to the company record.)

Use the [X] as highlighted in yellow to remove a contact.
Click **Done** when email address selection is completed.
Click on **Cancel** if you want to cancel out of email address selection.
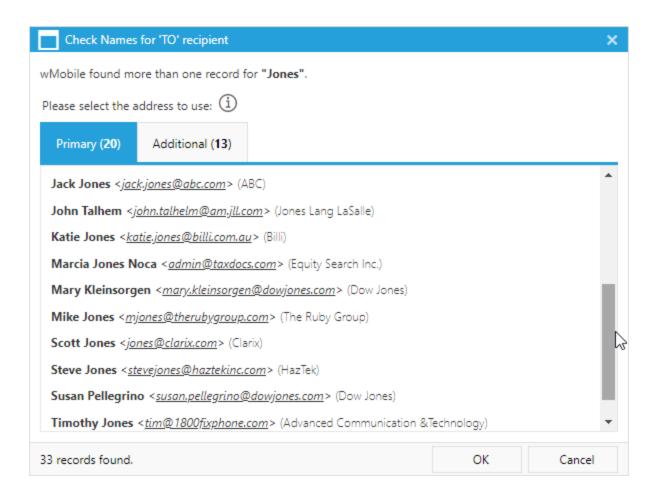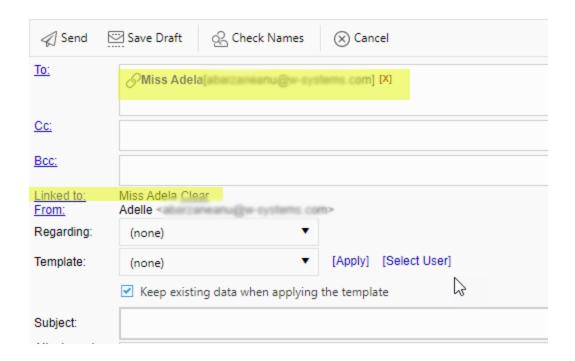
Another method to add an email recipient is to type in the recipient name and click on the **Check Names** button.
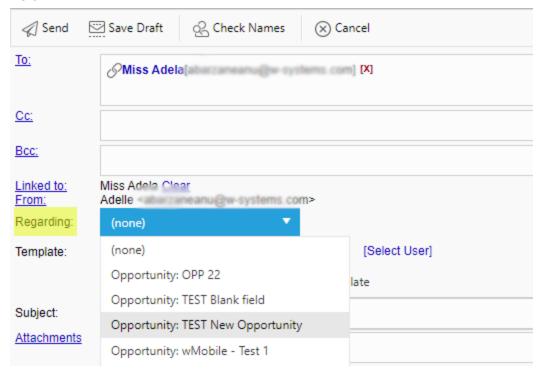
If there are multiple matches, a list will be provided for selection. Click **OK** when your selection is made.
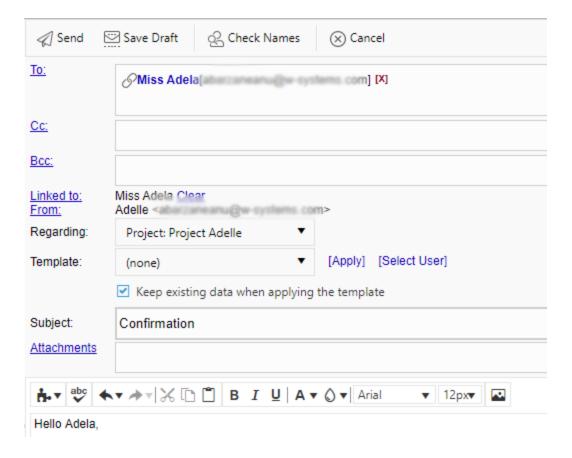
Once selected, the contact email address will be filled in. The paper clip icon indicates the email will be linked. The Linked To contact will be updated and displayed.
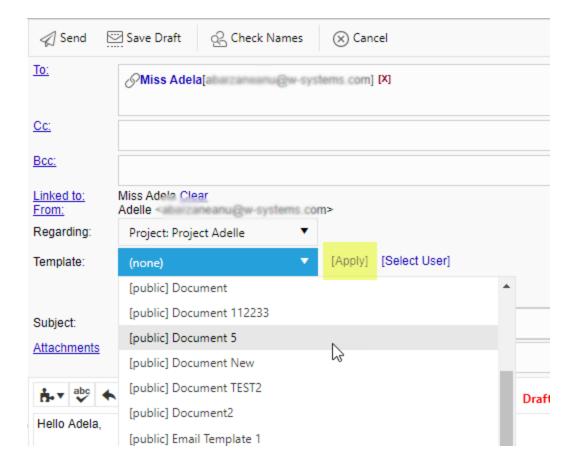
It is possible to link an email to an existing Case, Opportunity, or Project in the **Regarding** field.

Enter the email Subject and email message.
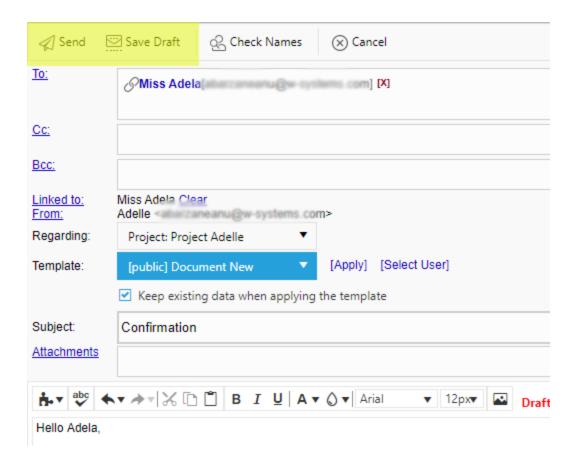
wMobile also supports applying email templates. Select an existing template from the list and click on **Apply**. Learn how to create an email template in wMobile Desktop.

Select **Send** when email is completed.
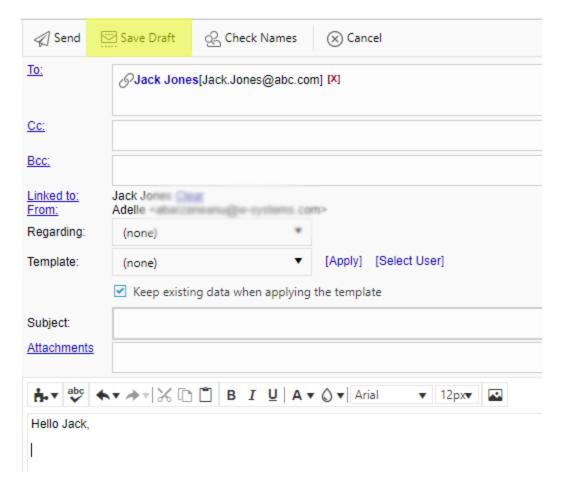
You also have an option to **Save Draft**.

Or **Cancel** to cancel out of the email message without sending.
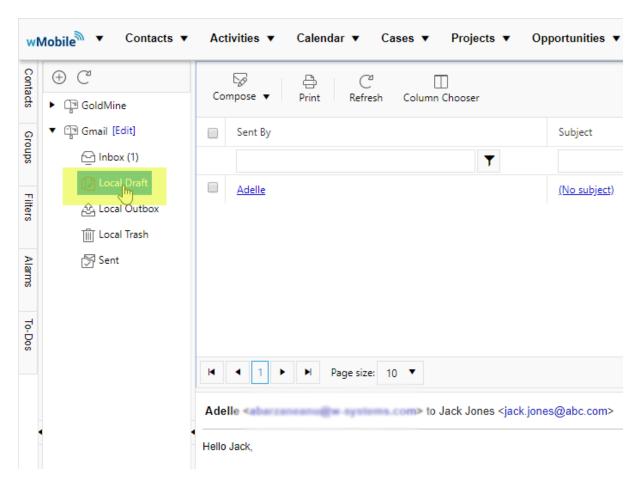
6.10.2 Save Email Draft

You also have an option to **Save Draft**.

If an email draft is saved, it will be located in the **Local Draft** folder where it can be edited and/or sent at a later time.

6.10.3 Email Message Options
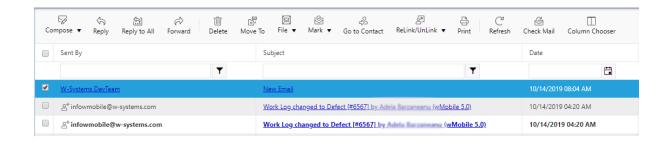
Email can be viewed from the Email Center.

When an email is selected, any of the options from the toolbar can be used to **Reply**, **Reply to All**, **Forward**, **Delete**, **Mark** (as Read or Unread), or **Print**.

Use **Go To Contact** to view that contact in wMobile.

Link to Contact: This option will appear when an unlinked email is highlighted. When the **Link to Contact** button is clicked, it will bring up a **Lookup Contact** window to search for the contact to which to link the email message.

NOTE: This option will add the email address to the contact selected.
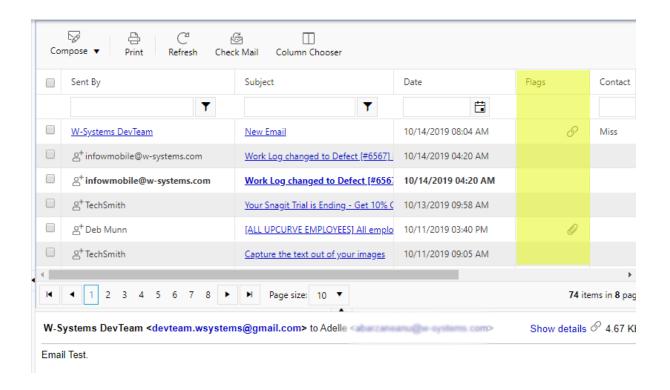
Email messages are linked to contacts in GoldMine based on a matching email address.

A linked email will have a chain link icon in the Flags column.

An unlinked email message will not have the chain link icon.

A paper clip icon indicates an email attachment.

ReLink/Unlink: this option is used on linked email to link to another contact.

Under **File** you will see the following options:

File to History & Delete: this will file the email under the contact's History and delete it from the online Inbox.

File to History and Keep in Inbox: this option will file the email to the contact's History and keep a copy in the Online inbox.

Copy to GM Inbox: This will copy the email to the GoldMine Inbox and leave a copy in the Online inbox.
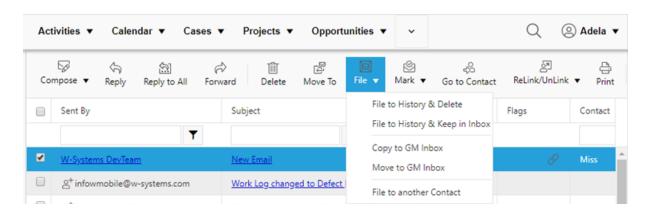
Move to GM Inbox: this option will move the email to the GoldMine Inbox, deleting it from the Online Inbox.

File to another contact: this option will link the email to another contact. It will not add the email address to the other contact.

Refresh: this will refresh the items in the Inbox. Sometimes a refresh will be needed to clear emails that have already been processed.
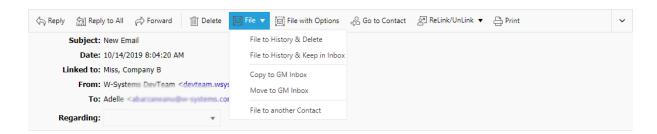
Check Mail: this option is used to check the server or ISP mailbox for new email messages. The email fetcher will do this automatically based on how the email account is configured, but this option can be used if you need to check immediately. The default interval for checking for new email is 30 minutes, but can be configured in the wMobile Manager Console.

Column Chooser: Click on this toolbar icon to add different fields to the Email Center display.
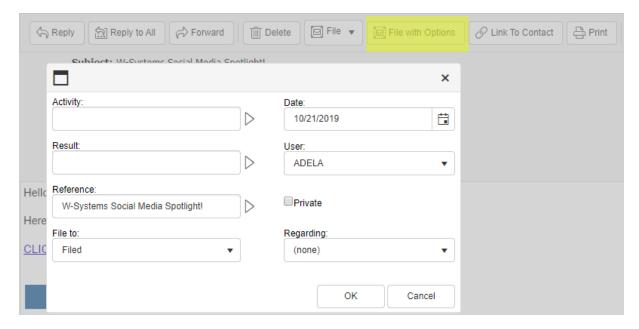
Clicking on the email subject will open the email, where the same options will appear to process email messages.

NOTE: the underlined contact name in the Sent By column is a hyperlink and will navigate to the contact record.

File with Options will file the email (and delete it from the Inbox) with the options to specify an activity code, result code, Filed folder etc.
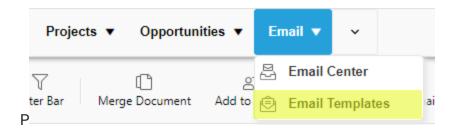
6.10.4 Email Templates (Desktop)
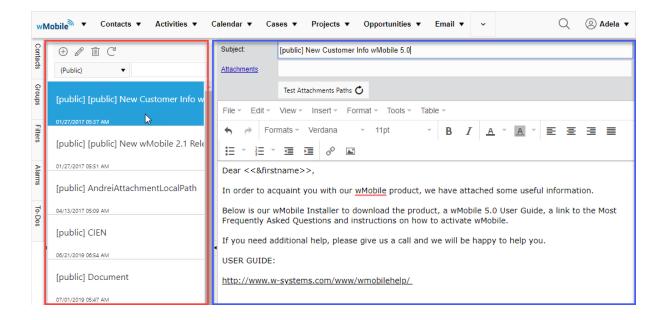
wMobile Desktop supports the use of email templates and gives users the tools to create new email templates and edit existing ones .

Email Templates Access / User Interface
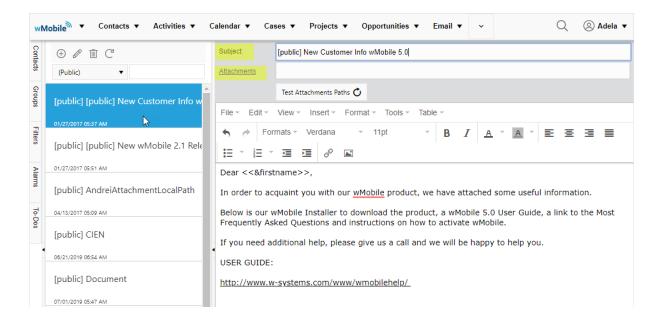
On the wMobile Desktop menu bar, click **Email > Email Templates**:

The **Email Templates** window will open and display a template list (red area) with tools and a template editor (blue area):

Clicking on an existing template within the template list will cause that template to display in the editor. The **Subject** and **Attachments** (if any) will be populated along with the body text.

Above the template list is a set of icons/tools:

From left to right, the tools are:
New: Create a new email template.
Rename: Rename the "selected" template.
Delete: Delete the "selected" template.
Refresh: Refreshed the email template list.
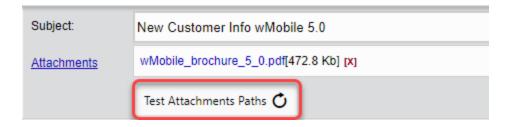
In the editor is a menu containing tools for filing, editing, and formatting the template:
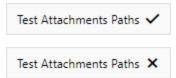
If a template contains an attachment, the existence of the attachment can be tested. To do this, click the **Test Attachments Paths** button:
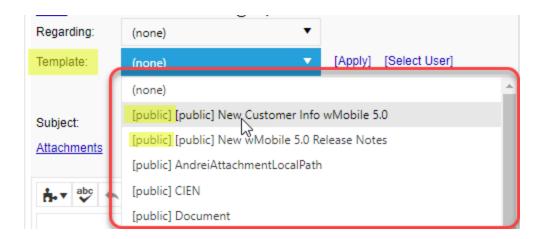
Upon success, the button icon will change to:

Upon failure, the button icon will change to:

Using an Email Template

When composing an email in wMobile Desktop, use the **Template** drop-down to select a template:
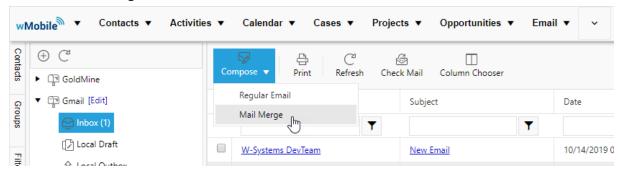
> 📄 **NOTE**: The list of email templates found in the **Template** drop-down will be those that are owned by the user logged into wMobile and those that are set as "public" in wMobile or GoldMine. The publicly owned templates will be at the top of the drop-down list and are prefixed with "[public]" (e.g., "[public] wMobile Brochure w/PDF").

For instructions on composing email, please see the topic: Compose Email.
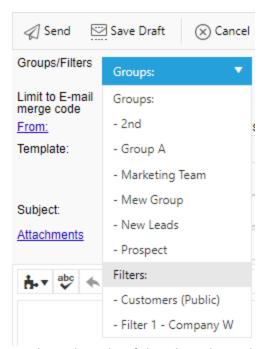
6.10.5 Email Merge

On composing a new email in wMobile Desktop, there's a choice to compose a **Regular Email** or **Mail Merge**.

• A Regular Email means creating a normal internet message for a set of recipients by manually adding them.
• A Mail Merge is the option to send the internet message to filter/group of contacts

In the Groups/Filter drop down list, all the user's groups and filters will be listed, including public groups and filters.
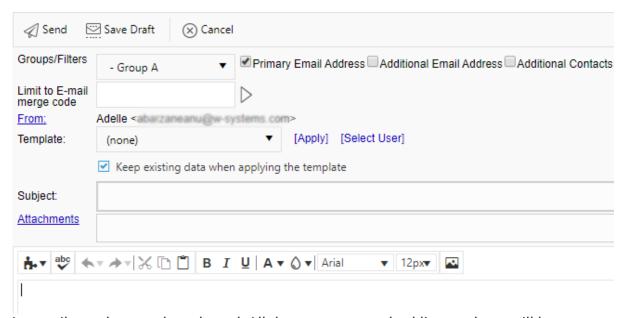
On the right side of this drop down there are three checkboxes for different options:
• Primary Email Address – means the email will be sent to primary email address of each contact in the selected group or filter
• Additional Email Address – means the email will be sent to all non-primary email addresses of each contact in the selected group or filter
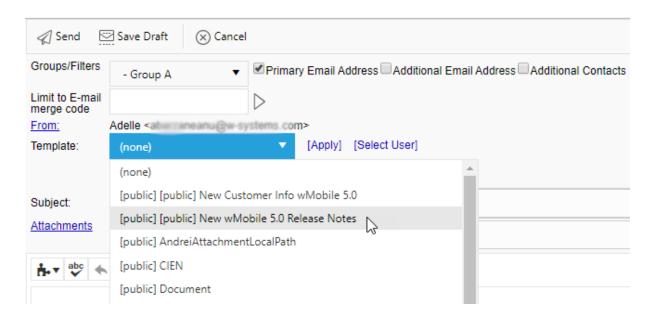
• Additional Contacts – means the email will be sent to email addresses of all additional records for each contact in the selected group or filter.
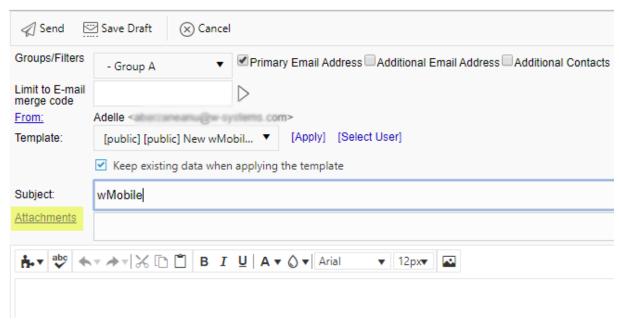
The email can be limited to a specific E-Mail merge code (in place of, or in addition to, a group or filter).
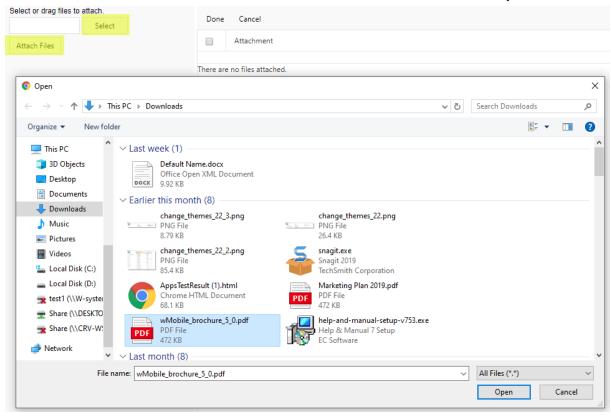
An email template can be selected. All the users own and public templates will be available. After a template is selected, select **[Apply]**.
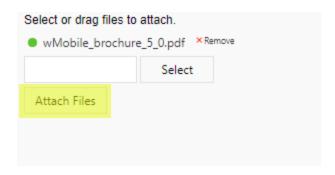
Attachments can be added.

Click **Select** and browse for a file. Double-click on the file name or select **Open**.
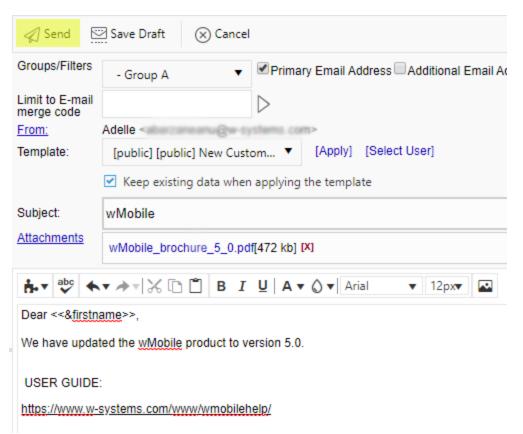
After selecting a file, click on **Attach Files**.

Select or drag files to attach.

● wMobile_brochure_5_0.pdf ✕ Remove

Select

Attach Files

If a template is not used, the email body can manually entered. Even if a template is used, the text can be updated.

When all options have been entered and the email body is filled in appropriately, select **Send** to send off the email merge to the selected filter or group of contacts.

✈ Send   ✉ Save Draft   ⊗ Cancel

Groups/Filters   - Group A ▼   ☑ Primary Email Address ☐ Additional Email Ad

Limit to E-mail merge code   ▷

From: Adelle < ~~aberzaneanu@w-systems.com~~ >

Template: [public] [public] New Custom... ▼   [Apply]   [Select User]

☑ Keep existing data when applying the template

Subject: wMobile

Attachments   wMobile_brochure_5_0.pdf[472 kb] [X]

▯▾ abc ◂▾ ▸▾ | ✂ ▭ ▯ | B I U | A ▾ ◊ ▾ | Arial   ▼   12px▼ ▨

Dear <<&firstname>>,

We have updated the wMobile product to version 5.0.

USER GUIDE:

https://www.w-systems.com/www/wmobilehelp/

NOTE: It is always recommended to send email blasts to a test group or filter first to double-check formatting etc.

6.10.6 Local Email Rules
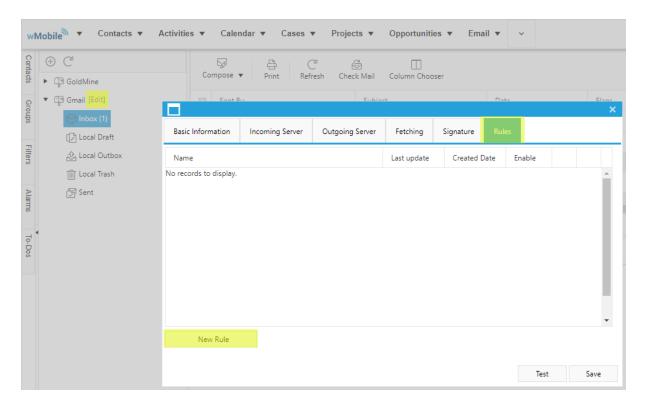
Local email rules will allow user to create filters for email handling and specify rules for what should happen to those emails, such as copying email to the GM Inbox or a specific project folder, marking email as Read, or forwarding email.

These are 'Local' email rules in wMobile, to be distinguished from email rules that users might have in GoldMine, Outlook, or other email clients.

These email rules will allow us to replicate the auto-retrieve and auto-delete email settings from GoldMine to copy email from the Online Inbox to the GoldMine Inbox and then remove them from the Online Inbox.
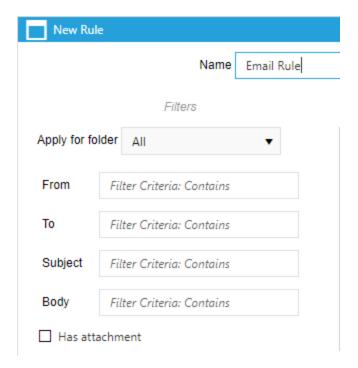
There is a Rules tab in Email Settings in wMobile Desktop, where Local Email rules can be configured. Additional information on configuring email can be seen in Configuring User Options

New rules can be added to the Rule tab by selecting **New Rule** as shown here.

The rule condition contains one or more filters, as follows:

Select / Apply for folder
Filter on FROM recipient
Filter on TO recipient
Filter on SUBJECT text
Filter on BODY text
Filter on ATTACHMENTS

Note: Filters on FROM, TO, SUBJECT, BODY are applied with CONTAINS function.

Example:
If the Filter criteria is SUBJECT='invoice'
Then the Incoming email (Subject='Please send invoice details') will evaluated as matching because it CONTAINS 'invoice'.
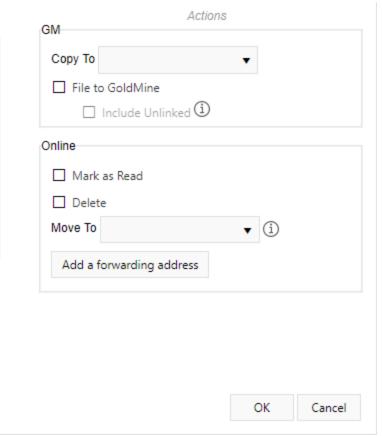
A rule can be set for one folder or all. Apply rules only for folders that are visible in wMobile, otherwise the rule will not be applied.
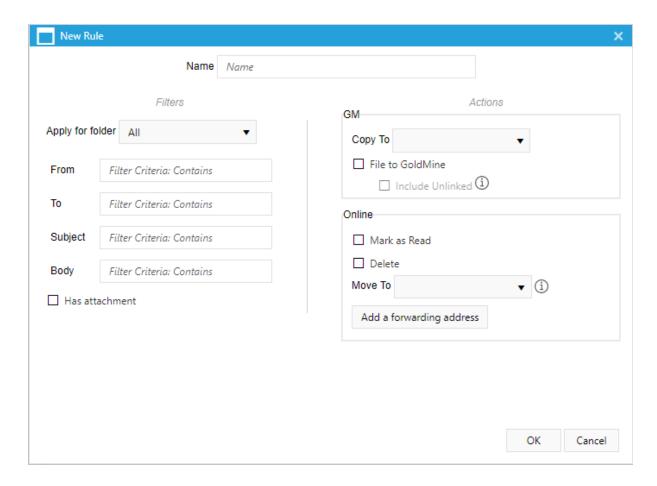
Setting up a rule with no condition (no values in FROM/TO/SUBJECT/BODY/ATTACHMENTS) will result in processing of ALL incoming emails from the selected folder.

The rule action contains one or more sub-actions, as follows:

Copy to GoldMine folder
File to GoldMine
Mark as Read
Delete
Move to Online folder

These options provide a range of possibilities for processing email. We can archive email into project folders, delete junk mail based on a specified criteria, forward email to other email address(es). We can now also emulate GoldMine's auto-retrieve and auto-delete functionality to copy new email into the GoldMine Inbox and remove it from the Online Inbox.

When the desired Filters and Actions have been configured, select **OK** to save the rule.

Multiple rules can be created for different purposes.
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6.10.7   Meeting Requests

If an incoming email contains a meeting request, a meeting response or a canceled meeting, the email will be parsed and the body of the email will be created using information extracted from the meeting part.

See related topics:
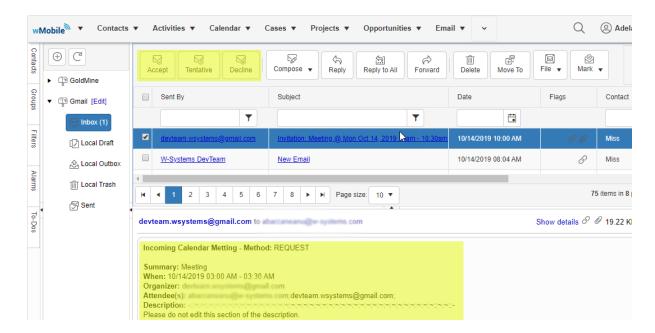
[Accepting Meeting Requests](#)
[Meeting Cancellations](#)
[Using Meeting Requests with Office 365](#)
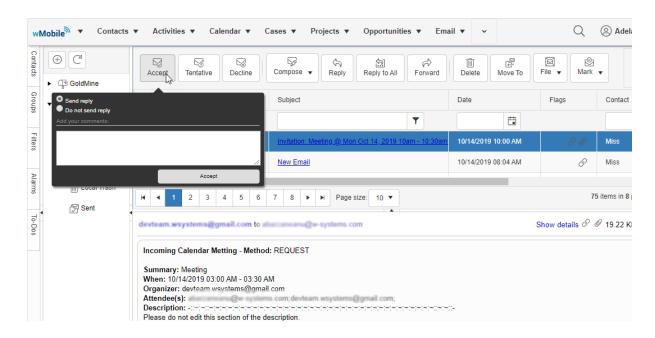
6.10.7.1 Accepting Meeting Requests (Desktop)
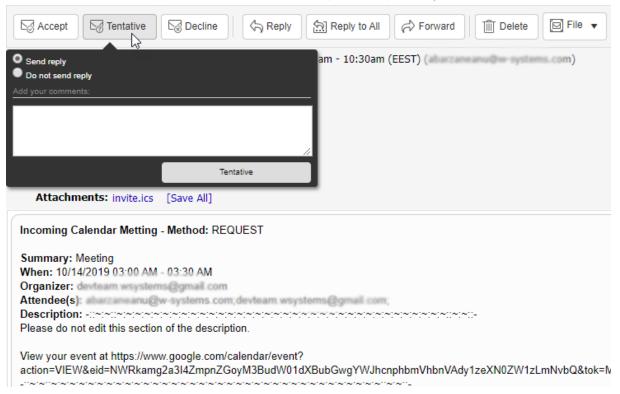
In wMobile Desktop, when the selected email from Email Center contains a meeting request, three new buttons will be added to the email toolbar: '**Accept**', '**Tentative**', '**Decline**'.

When hovering the mouse over one of these buttons a tool tip will be opened where the user can insert his comments and choose if he wants to send a reply email or not to the meeting organizer to notify him whether or not he will be attending. The response will be sent when the user presses one of the three buttons or presses the button inside the tool tip.

The same behavior happens when the email is opened separately.

1. A meeting response email would be created:
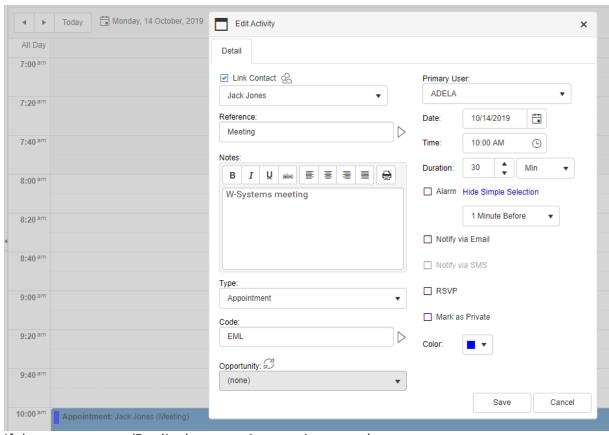
If the '**Send reply**' option is checked, a meeting reply email would be created and sent to the meeting organizer to notify him whether or not the user will be attending.

Meeting accepted.

When a user responds to a meeting request the following actions can happen:

2. An appointment would be inserted in the user Calendar

If the user presses 'Accept' or 'Tentative', a new appointment is created and inserted in his calendar:

If the user presses 'Decline', no appointment is created.
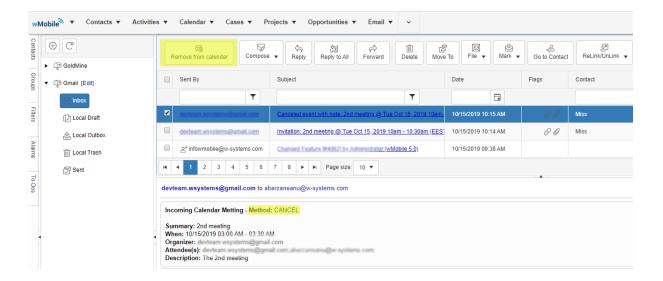
3. After the user responds, the email is deleted and filed to GoldMine. This action happens regardless of the response.

6.10.7.2 Meeting Cancellations (Desktop)

When opening an email that contains a canceled meeting, a new button will be added to the email toolbar: 'Remove from calendar'.
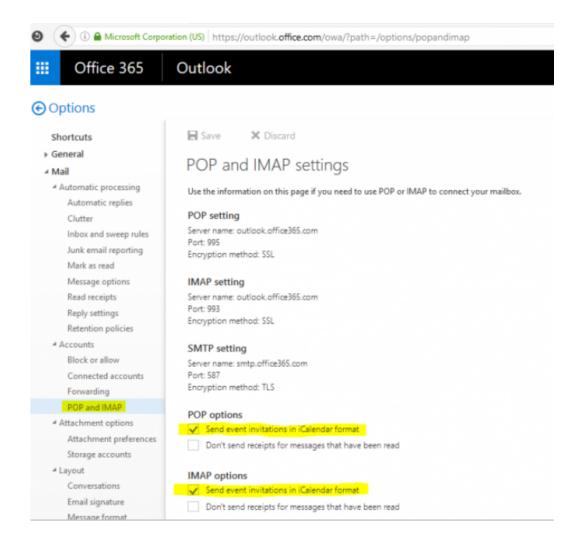
When clicking on that button, the pending activity linked to that email is deleted from calendar and email is Filed to GM.

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6.10.7.3 Using Meeting Requests with Office 365 (Configuration)

If you're using a Microsoft 0ffice 365 account, some configuration is required.

Go to: https://outlook.office.com/owa/?path=/options/popandimap, and verify if 'Send event invitations in iCalendar format' is checked, as in the image below:

6.11   Working with Cases
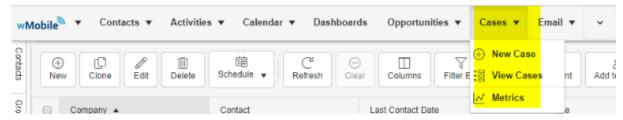
wMobile Desktop supports GoldMine cases in order to view, create, and update Cases. wMobile customers use Cases for different types of service or support cases.

See the links below:

[View Cases](#)
[New Case](#)
[Working with Case Tabs](#)
[Case Metric Dashboards](#)
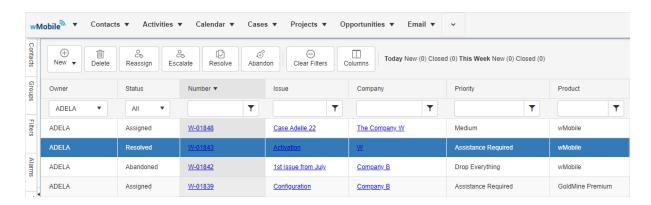
6.11.1 View Cases

To access the Service Center, select **View Cases** from the wMobile menu.
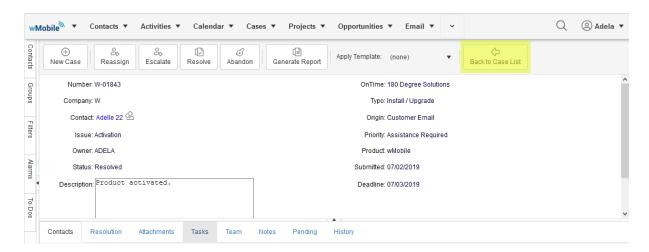
Click on a case link in the Number or Subject column to bring it up in detail view.

Clicking on the Company hyperlink will navigate back to the main account record.
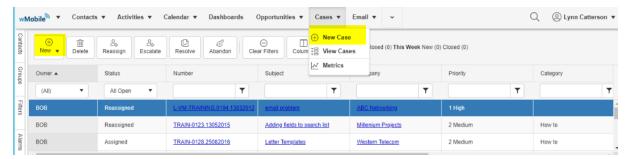
The case can be edited or activities logged. When ready, click on **Back to Case List** to return to the summary list of cases.
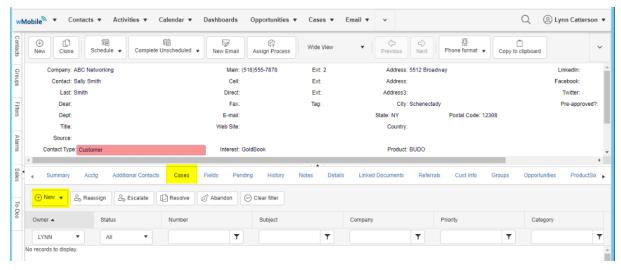
6.11.2 New Case
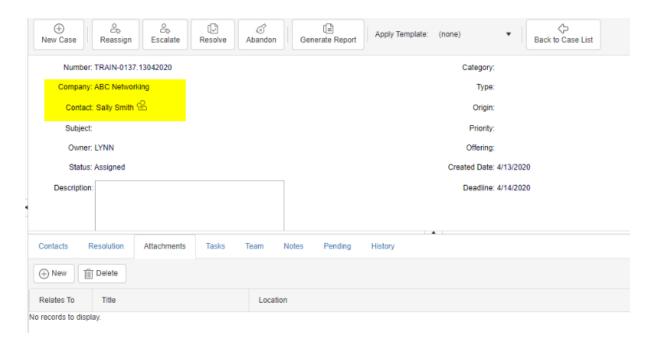
To create a new Case, select **New Case** from the Cases menu or use the **New** button on the Cases toolbar.
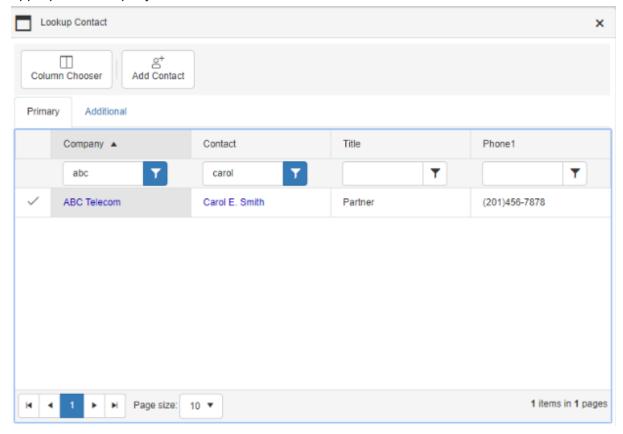
A Case could also be created from the Cases tab on a Contact record. Use the **New** button on the Cases tab toolbar.
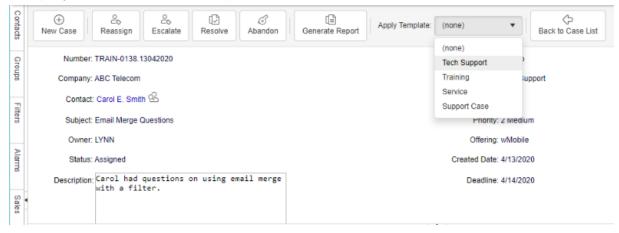
If this method is used, the Company and primary Contact will be filled in automatically.

If a case is created from the Service Center, the user will need to search for the appropriate company and/or contact record.
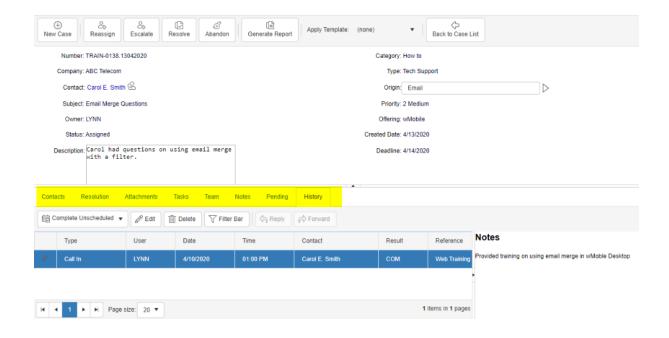
The remaining fields can be filled in as appropriate. A template can be applied if your company or team uses case templates.

See [Working with Case Tabs](#).
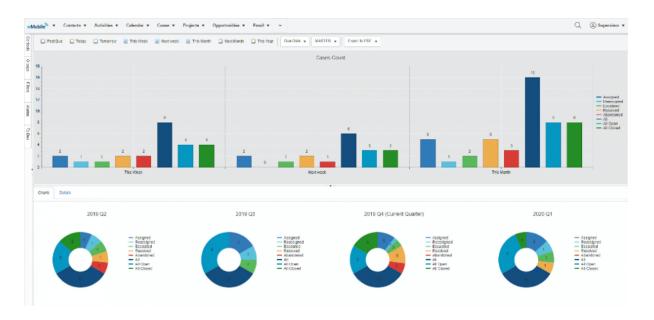
6.11.3   Working with Case Tabs

The same tabs are available in wMobile Desktop as in GoldMine to track information related to the Case including Contacts, Resolution, Attachments, Tasks, Team, Notes, Pending, and History. Actvities created from the Pending or History tab will automatically be linked to the Case.
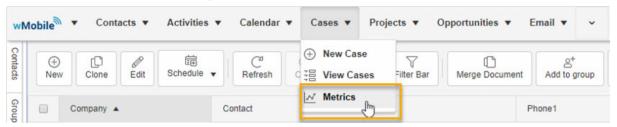
6.11.4 Case Metric Dashboard

The Case Metric Dashboard was introduced in wMobile 5.0.0.511, in January 2020. These metrics represent a better way to track, analyze, and summarize all types of cases.

The metric dashboard can be opened from Cases tab -> Metrics:

Cases metrics include 2 big areas:

- The top part of the dashboard contains bar charts with the cases counts.
- In the bottom half of the dashboard, you will find the donut charts split in 4 quarters, representing periods of a year.
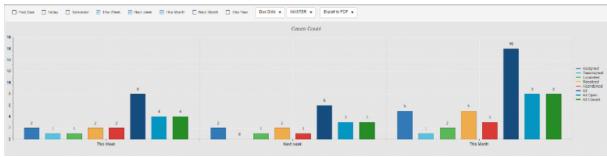
In the first area, you can make different selections based on time period, User, and Case Status.

For the counted cases you can select different periods of time, by checking the checkboxes above the graphs, these can be counted/displayed by 'Created Date' and 'Due Date'.

You can choose for which user you want to display the cases graphs (based on user permissions in GoldMine).

The legend of the colors is detailed on the right side. The case types are displayed or hidden by clicking on the color specified.
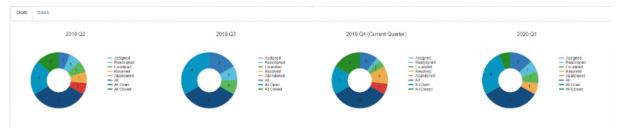
These graphs can be exported in .pdf format.

Click on a bar in the chart to drill down to a list of the Cases.

Select the Charts tab to return to the list view.

In the second area, you can see the donut charts which represent 4 time periods of a year. The legend color is also detailed on the right side with the same actions as in the Cases count area.

As above, if you want to see the assigned cases, you simply click on the color assigned to this type of case in the chart to drill down. The details tab will be opened.

From this tab, you can modify a case, by clicking on its number. It can also be deleted (based on GoldMine permissions).
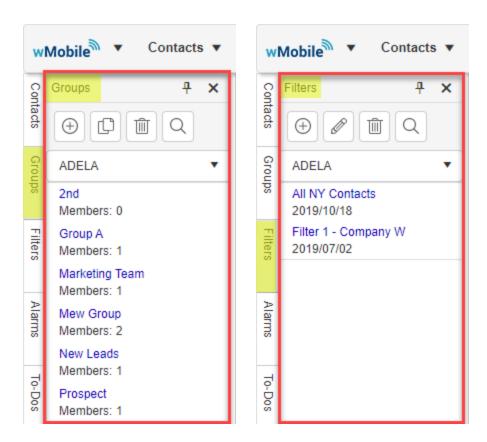
By clicking on the company or contact name the contact page will be opened.

Click on the Charts tab in the top left of the drill down the chart to return to the Chart view.

We hope the Case metric dashboard will help you track the progress of your cases, provide easy access for updating information, and make sure no Case gets overlooked.

6.12   Working with Filters and Groups

Groups (i.e., contact groups) and **Filters** that are created using wMobile (and/or defined in GoldMine) will be displayed on the appropriate tabs at the left of the Desktop windows:
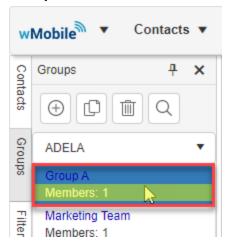
By default, the the Groups and Filters of the logged in user are displayed. However, using the drop-down to select another user will cause that user's groups/filters to be displayed.

When a tab is clicked, the window opens to display the items and tools appropriate for that list. The tools for each are described here:
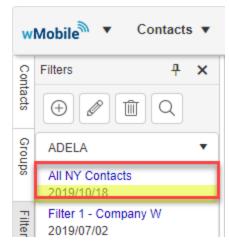
Group / Filter Tools

Before using the **Groups** or **Filters** tools, an item must be selected. When selecting a specific group or filter from the lists, do not click on the link itself as that opens a contact list containing the results of the selection made. To use the tools, click on the area below the group/filter name and the selected item will be highlighted when selected as shown here:
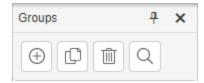
Groups: **Filters:**
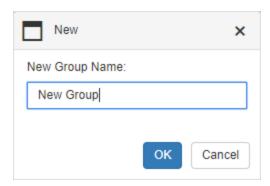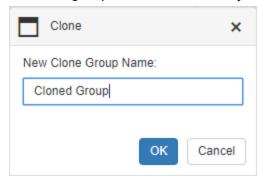
Groups tools:
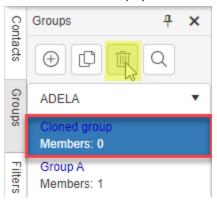
New - Use to create a new group. After the following dialog is displayed, enter a group name for the new group and click **OK**. After the group is created, search for contacts and add them to the newly created group as desired.

Clone - Use to clone (i.e., copy) an existing group into a new group having a new name. After the following dialog is displayed, enter a group name for the new group and click **OK**. After the group is cloned, the newly cloned group will be available to display its contacts.
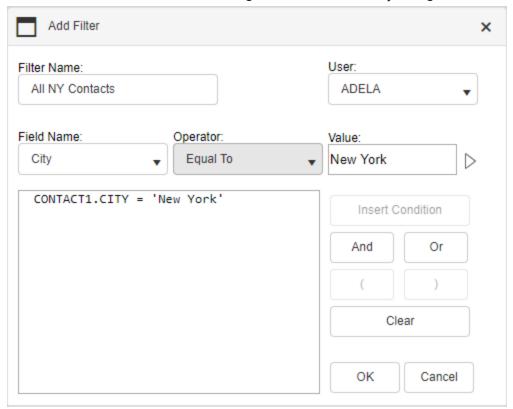
Delete - After selecting a group, use this button to delete the group (contacts in the group will not be deleted). (WARNING: The user will NOT be prompted before filter is deleted!)
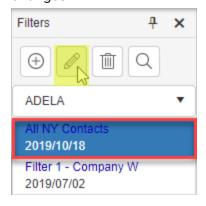
Filters tools:
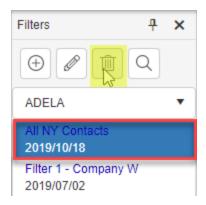
New - Use to add a new filter. After the following dialog is displayed, enter a filter name for the new filter. Enter the filter criteria as desired and then click **OK**. After the filter is created, search for contacts meeting the filter's criteria by using its link.

Edit - Use to edit an existing filter. The dialog that appears is similar to the one used to create a new filter. After making necessary edits to the filter, click **OK** to save the changes.

Delete - Deletes the currently selected filter. (WARNING: The user will NOT be prompted before filter is deleted!)
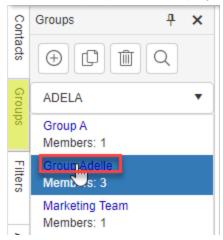
Viewing Groups / Filters Results
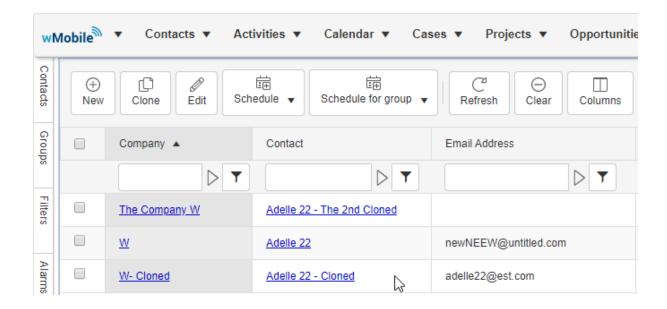
To view the contacts that are in a group or found using a filter, select the group or filter by clicking on the group/filter name's "link" from the appropriate list and the results will be displayed. Below are examples of using each.

Group Results

Select the group link to display its members:
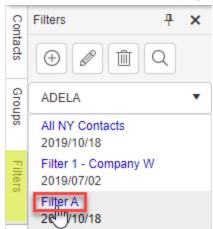
The members of the selected group are displayed:
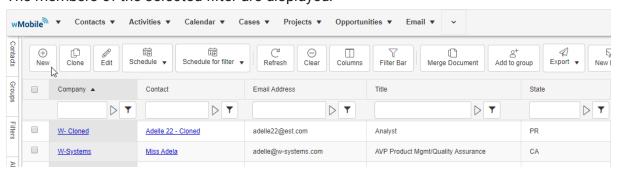
Filter Results

Select the filter link to display its members:
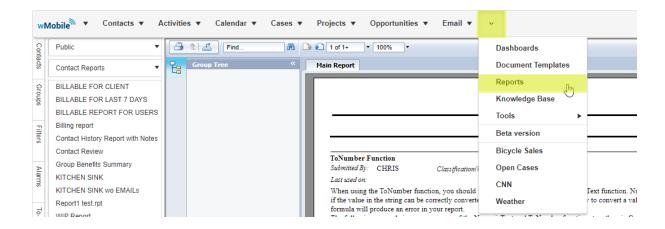
The members of the selected filter are displayed:
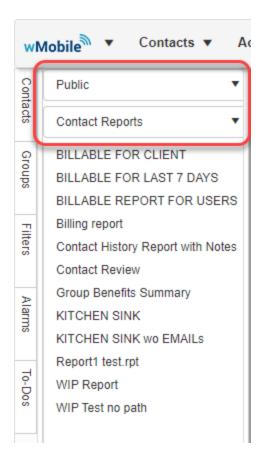
6.13 Working with Reports

wMobile Desktop supports running Crystal Reports. The Crystal Reports Runtime engine must be installed for the Reports functionality to work.
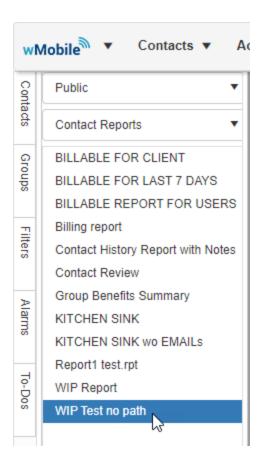
The reports themselves must be written using Crystal Reports tools and then stored/maintained in GoldMine. Once the reports are accessible for use in GoldMine, they can then be accessed using the **Reports** button from the expanded menu list.

To access a specific report, select the appropriate user library and category the report was filed to.
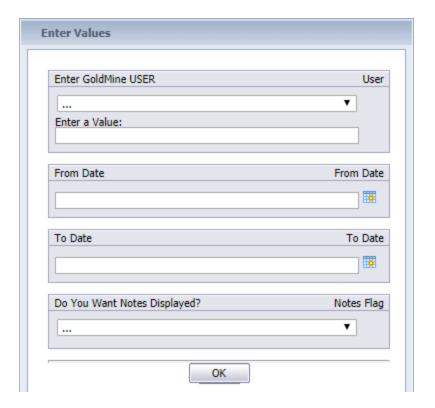
Only Crystal Reports will appear on this list.
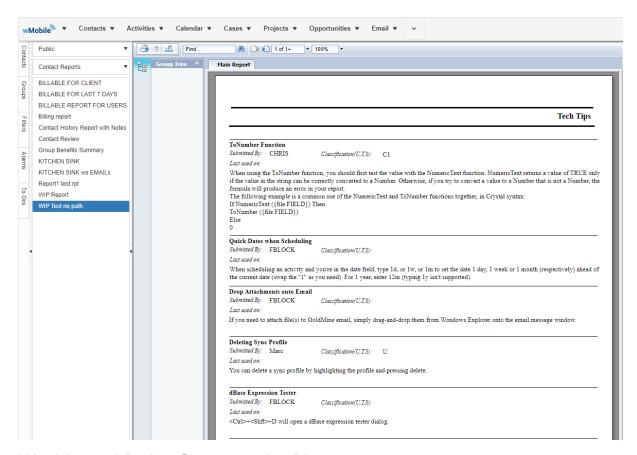
To run a report, double-click the report name (for the following example, "**WIP Test no path**" was used).

If the report requires any parameters to be selected (**Enter GoldMine USER** in this example) the user will be prompted. After the parameters are set, click **OK**:

The report will be generated and then displayed. The Crystal Reports Runtime provides the report navigation tools like paging through the report, zoom level, find, and more:

6.14   Working with the Opportunity Manager

Using Opportunity Manager in wMobile Desktop

The Opportunity Manager in wMobile is available to help users work with and maintain opportunities that are simple or complex having many components. As an example, a large sales potential might involve a few contacts, several appointments to get things scheduled, several files may be used for reference, and so on. With an opportunity, all of these components are consolidated into one central location to make the components of the opportunity easy to find, navigate, review, and update. Opportunities can be assigned stage values and status values to track progress as well as start and end dates.

See the links below:
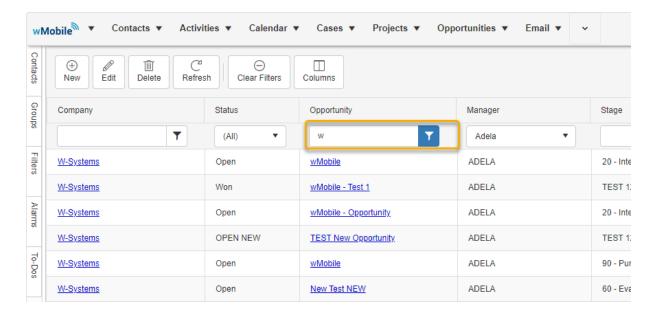
View Opportunities
New Opportunity
Working with Opportunity Tabs
Opportunity Metrics

6.14.1 View Opportunities

Opportunity menu:
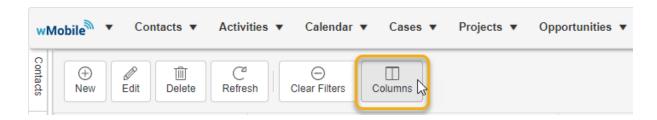
To view existing Opportunities in wMobile, click **Opportunities** on the toolbar and select **View Opportunities**:
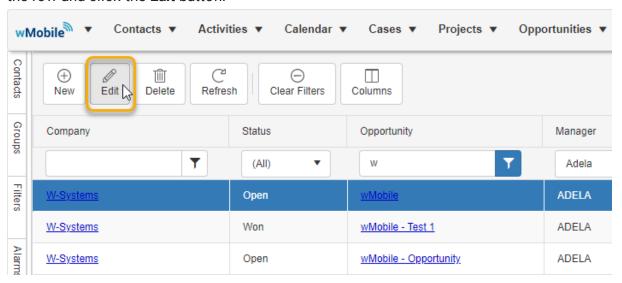
wMobile will display the **Opportunity List** screen and will list the opportunities. Please note that the opportunities can be filtered by typing into the filter field and pressing enter (the funnel button allows the user to change the scope of the value searched for within the field; this is typical for most columns in the **Opportunity List**):
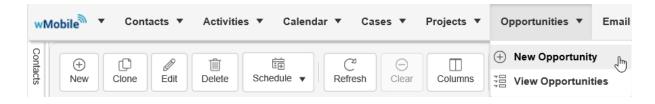
Other columns in this view display information for **Stage**, **Code**, **Probability**, **Forecast**, and more. The displayed columns can be controlled to be visible or hidden, and the order they appear in, using the **Select Columns** button.
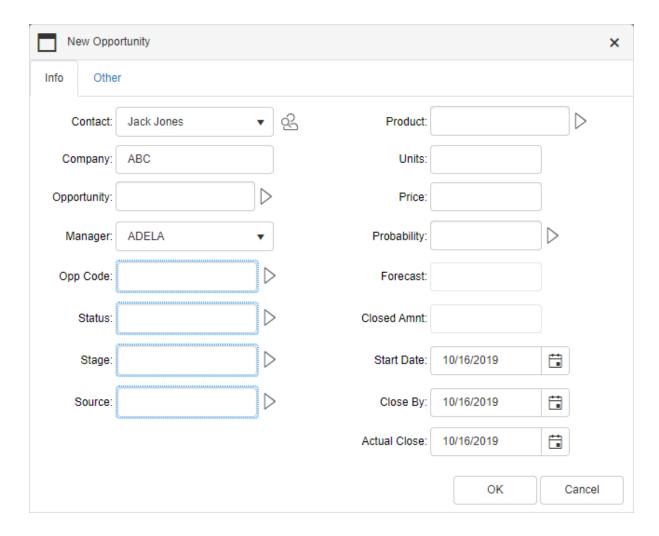
The tool buttons allow a user to create a new opportunity, edit an existing one, refresh the list of opportunities, or select the columns to be displayed. To edit an opportunity, select the row and click the **Edit** button.

6.14.2 New Opportunity

Opportunity menu:

Click the **New Opportunity** button to open the **New Opportunity** dialog:
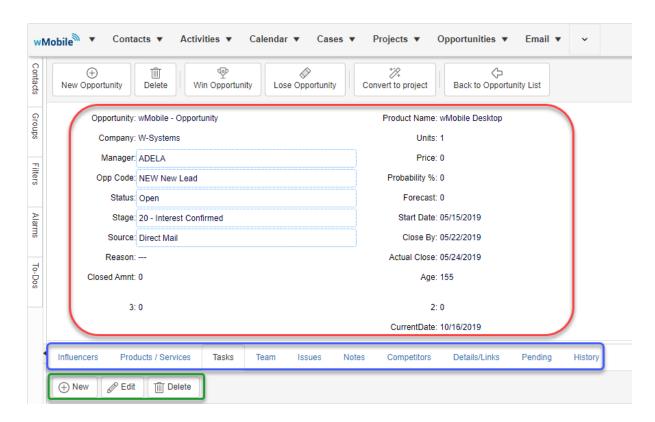
Enter the "main" opportunity information here. This information is displayed in the **Opportunity List**. Other components and details that need to be related to the opportunity are added after the opportunity is created.

Clicking on the arrow icon opens a lookup list to select a pre-defined value from. However, the user can type directly into the field (free form) if that is desired. The **Manager** drop-down field contains a list of users to select from. The three date fields can have their values set using the calendar button to open a date selector.

After all of the information is entered, click **OK** to create the opportunity.

In the following examples, the sample opportunity named: **wMobile - Opportunity** linked to company "**W-Systems**" (seen in the **Opportunity List** above) will be used.

Once the opportunity is added and appears in the **Opportunity List**, click on the opportunity name to view its details (in red frame):

Users can manage the components and details of the opportunity using the tabs (shown above in the blue frame). Each of the tabbed views contains a toolbar typically containing the tools: **New**, **Edit**, and **Delete** for working with the data within the specific tab (tools are shown above in the green frame).

6.14.3 Working with Opportunity Tabs (Desktop)
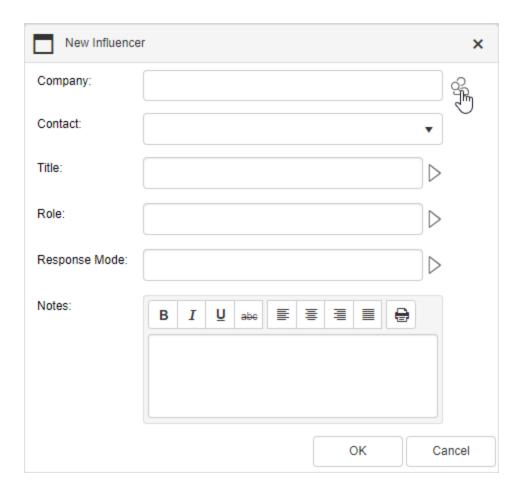
The same tabs are available in wMobile Desktop as in GoldMine to track information related to the Opportunity including Influencers, Products/Services, Task, Team, Issues, Notes, Competitors, Details/Links, Pending, and History.

Influencers:

Add one or more influencers that should be associated with the opportunity. These may be anyone in your database that has a part in the opportunity. Use this to add sales staff, IT techs, vendors, purchase agents, prospects, etc. If the influencer you want to add does not exist in your database, it can be added without leaving this tab. To add an influencer to the opportunity, click the **New** button to open the **New Influencer** dialog.
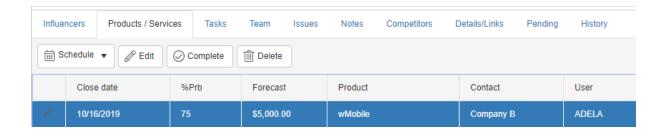
On the **New Influencer** dialog, search for a influencer using the Lookup button. In the **Lookup Contact** dialog presented, search for the influencer (actually a contact) to add to the opportunity, or use the **Add Contact** button to add a new contact to the database and then to the opportunity.

Products / Services:

This tab stores products and services that are related to the opportunity. The specific items can be assigned to specific users. The area below the tabs displays, from left to right, the tasks:

	Close date	%Prb	Forecast	Product	Contact	User
✏	10/16/2019	75	$5,000.00	wMobile	Company B	ADELA

Tabs: Influencers | Products / Services | Tasks | Team | Issues | Notes | Competitors | Details/Links | Pending | History

Toolbar: 📅 Schedule ▼ | ✏ Edit | ⊘ Complete | 🗑 Delete

Tasks:
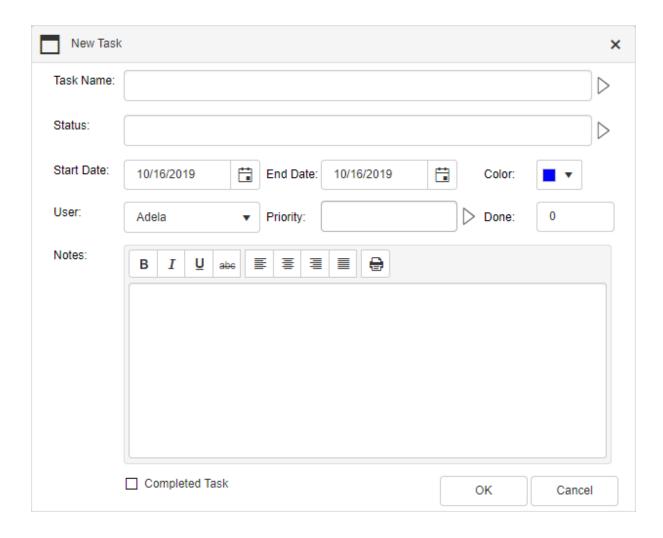
Schedule actions to take place for the opportunity. The specific tasks can be assigned to specific users. The area below the tabs displays the list of tasks:

Tabs: Influencers | Products / Services | Tasks | Team | Issues | Notes | Competitors | Details/Links | Pending | History

Toolbar: ⊕ New | ✏ Edit | 🗑 Delete

	Task Name	Status	Priority	User	Begin Date	End Date
✏	Task 1	Initial Follow Up	Medium	ADELA	10/16/2019	10/16/2019
✏	Add wMobile Users	In Process	High	ADELA	10/16/2019	10/16/2019
✏	Configure	In Process	Medium	ADELA	10/16/2019	10/16/2019
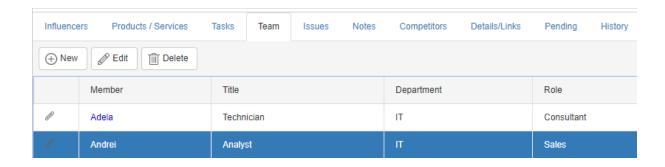
Start Date and **End Date**, **Priority**, **% Done**, and **Notes** can be set for each task using the **New Task** dialog:

Team:
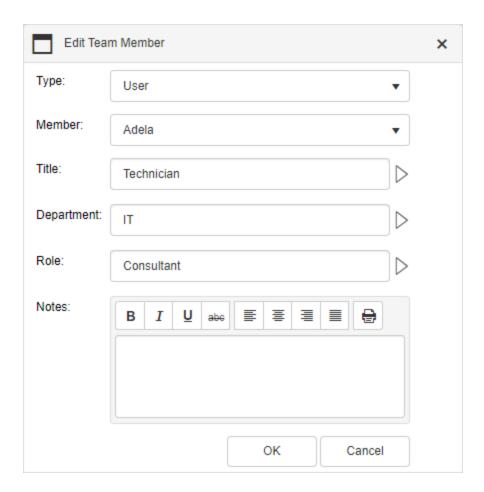
Create a "Team" for the opportunity on the **Team** tab. A team can consist of GoldMine users and/or contacts that are going to be contributing to the opportunity.
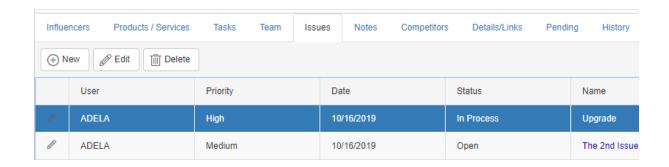
Following is a screenshot of the **Edit Team Member** dialog (the row was selected and **Edit** tool was clicked). The **Type** field allows the user to select either a GoldMine user or a contact and set them as a team member (GoldMine user for "Type" is shown here):

Issues:
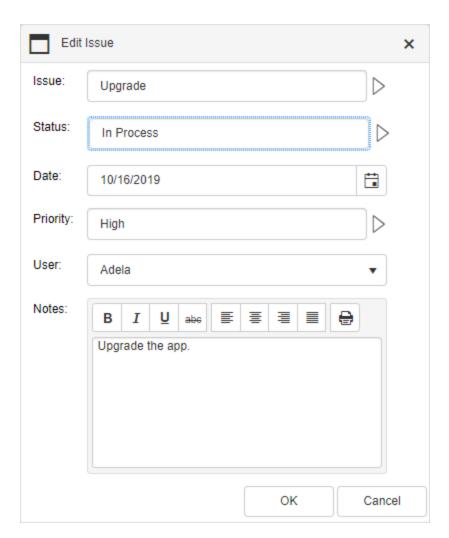
If there are and issues hampering the success in completing an opportunity, they can be tracked against an opportunity too. Here is an example of a problem that needs to be addressed:
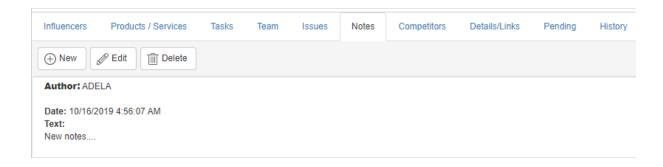
This screenshot of the **Edit Issue** dialog shows the information entered for the issue at hand. Here we can store and view notes pertaining to the issue:

Notes:

Notes are an important part of opportunity management. The **Notes** tab gives users a place to store and edit free-form notes. After a note is created, the **Author** and **Date** values are set by wMobile:

To add/edit notes, the **Add/Edit Note** dialog is used (the top of the **Edit Note** dialog is shown here; not shown are the **Save/Cancel** buttons):
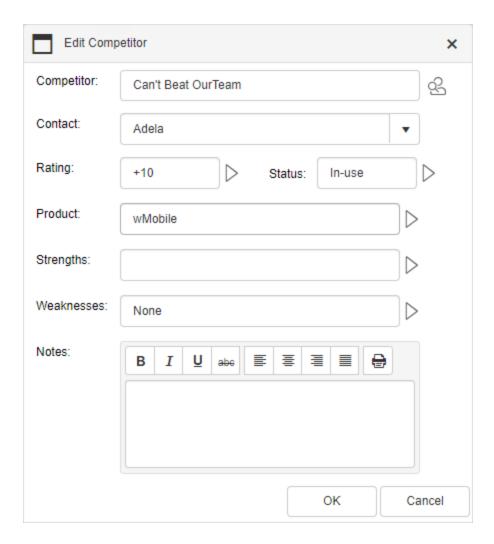
Competitors:

This tab allows a user to enter contacts that could be competition for the opportunity being tracked. The competitor can be selected from contacts within the database, a lookup list, or typed in.
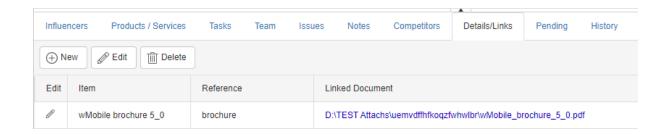
This screenshot of the **Edit Competitor** dialog shows the information entered for the competitor record. Here we can store and view notes pertaining to this competition:
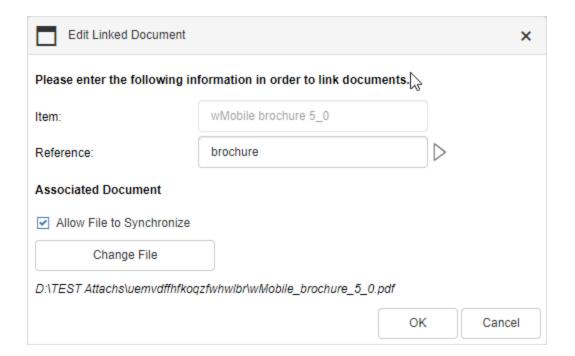
Details/Links:

This tab allows a user to enter very simple details consisting of two fields, **Item** and **Reference**, and the ability to "optionally" link a document to the record. If a file is linked to a record, the **Linked Document** path can be clicked on to download the file for use (i.e., if the device running wMobile supports the file format).

| Influencers | Products / Services | Tasks | Team | Issues | Notes | Competitors | Details/Links | Pending | History |

| + New | ✎ Edit | 🗑 Delete |

Edit	Item	Reference	Linked Document
✎	wMobile brochure 5_0	brochure	D:\TEST Attachs\uemvdffhfkoqzfwhwlbr\wMobile_brochure_5_0.pdf
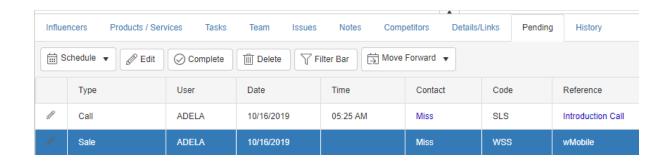
Displayed here is the **Edit Linked Document** dialog. Use the **Choose File** button to select a file to be linked to the opportunity. In our example of the **Riva Cloud Deployment** opportunity, we've linked a file containing a support document to have handy when needed.

Edit Linked Document ✕

Please enter the following information in order to link documents.

Item:　　wMobile brochure 5_0

Reference:　　brochure　▷

Associated Document

☑ Allow File to Synchronize

Change File

D:\TEST Attachs\uemvdffhfkoqzfwhwlbr\wMobile_brochure_5_0.pdf

OK　　Cancel
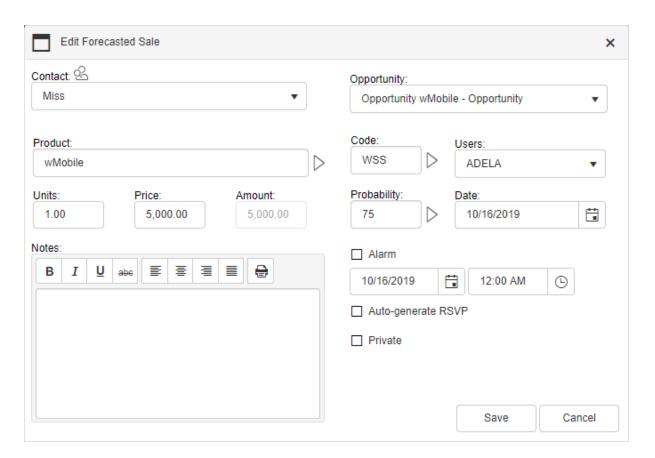
Pending:

In any given opportunity, there are always items that need to get done. When something needs to be scheduled, the **Pending** tab is the place. The **Schedule** drop-down on the **Pending** tab allows a user to schedule a **Call**, **Appointment**, **Other**, **Next Action**, **Sale**, or **Event**. Also available on this tab is: (1) the ability to Complete an activity, (2) filter the activities being viewed using the **Filter Bar**, and lastly, (3) a user can move an activity forward to a different date using the **Move Forward** drop-down which contains a pre-defined list of date increments (i.e., various numbers of days) or a date picker to easily set a specific date:

	Influencers	Products / Services	Tasks	Team	Issues	Notes	Competitors	Details/Links	Pending	History

	Schedule ▾	⌀ Edit	⊘ Complete	🗑 Delete	▽ Filter Bar	Move Forward ▾

	Type	User	Date	Time	Contact	Code	Reference
✎	Call	ADELA	10/16/2019	05:25 AM	Miss	SLS	Introduction Call
✎	Sale	ADELA	10/16/2019		Miss	WSS	wMobile

Clicking the **Edit** button with a row selected on the **Pending** tab opens the **Edit Activity** dialog (note the fields available for your information):

Edit Forecasted Sale   ✕

Contact: 👥
| Miss ▾ |

Opportunity:
| Opportunity wMobile - Opportunity ▾ |

Product:
| wMobile | ▷

Code:
| WSS | ▷

Users:
| ADELA ▾ |

Units:
| 1.00 |

Price:
| 5,000.00 |

Amount:
| 5,000.00 |

Probability:
| 75 | ▷

Date:
| 10/16/2019 | 📅

Notes:

| B | I | U | abc | ≡ | ≡ | ≡ | ≡ | 🖨 |

☐ Alarm

| 10/16/2019 | 📅 | 12:00 AM | 🕐 |

☐ Auto-generate RSVP

☐ Private

| Save | | Cancel |

History:
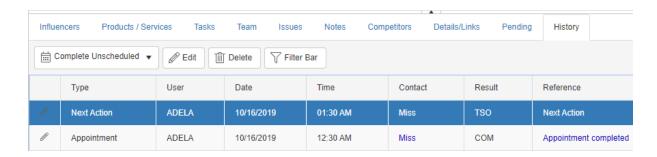
Another important aspect of opportunity management is history related to it. We need to be able to refer to items that have been completed. After a pending activity is completed it becomes a history record. The **History** tab displays completed activities for the

opportunity. Please note that there will be times when an action is taken for an opportunity that was not previously scheduled (i.e., no pending activity exists). In those cases, users can use the **Complete Unscheduled** drop-down to create a history record on-the-fly. The choices in this drop-down are: **Call**, **Appointment**, **Other**, **Next Action**, **Letter/Memo**, **Literature Request**, **Sale**, or **Event**.
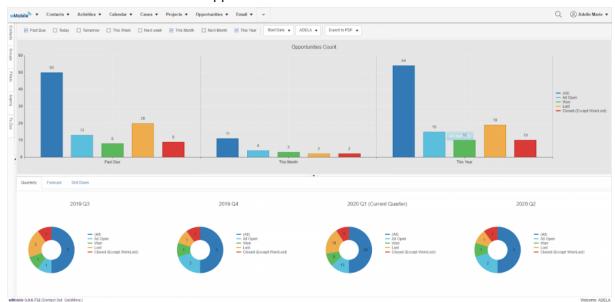
Clicking the **Edit** button with a row selected on the **Pending** tab opens the **Edit Completed Activity** dialog (note the fields available for your information):
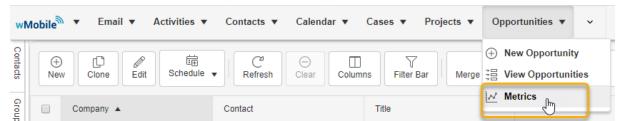
6.14.4 Opportunity Metrics

In Fall '19 a new feature has been added in wMobile for GoldMine (Desktop): the Metric Dashboards. These metrics dashboards represent interactive data graphs. This information is presented in bar charts, forecast charts, and donuts charts. In this article, we'll describe the metrics on Opportunities.
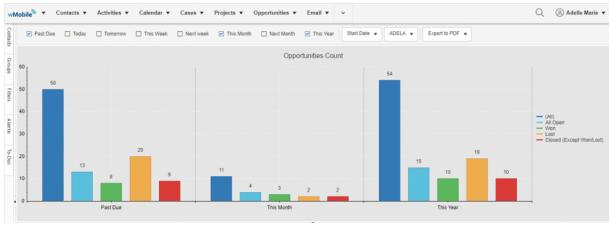
Keep track of your Opportunities with these new metrics which help you to analyze and visualize in an easier way the progress of the Opportunity sales on different periods of time.

The metrics dashboard can be open from the Opportunities tab -> Metrics:
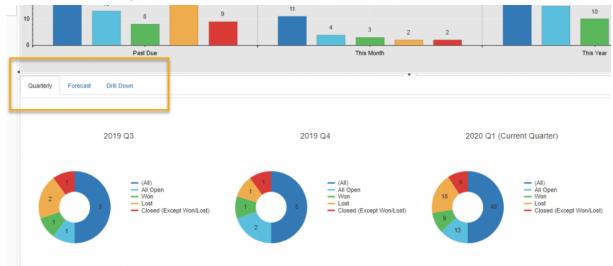
At the top of the Opportunity Count, you can make different selections for choosing what type of opportunities you want to display. It can be filtered by periods of time, 'Start/Closed Date' & 'Close By' or even to export one of the charts.
By permissions set in GoldMine, you can choose for which user you want to display the opportunities graphs.

In the first area of metrics you can also find:

- The top part of the dashboard represents the opportunities counts
- In the bottom section, there are three tabs which represent different information
  - In the 'Quarterly' tab, you will find four donut charts that represent 4 periods of time
  - The 'Forecast' tab represents the sum of all types of opportunities. Also, these graphs can be displayed quarterly
  - The 'Drill Down' tab will be open when a specific type of opportunity is selected. (For example, click on a column from the first chart and in the 'Drill down' tab the selected opportunities types will be listed. Select the Charts tab to return to the list view.

The legend of the colors is detailed on the right side. The opportunities types are displayed or hidden by clicking on the specified color. This behavior is applied for all types of graphs, in the Opportunities Count, Quarterly and Forecast tabs.

In the second area, you can see the donut charts which represent 4 time periods of a year. The legend color is also detailed on the right side with the same actions as in the Opportunities count area.

As above, if you want to see the active opportunities, you simply click on the color assigned to this type of opportunity in the chart to drill down. The 'Drill Down' tab will be opened.

From this tab, you can modify an opportunity, by clicking on its name. It can also be deleted (based on GoldMine permissions). By clicking on the company or contact name the contact page will be open. Click on the Quarterly tab in the top left of the drill-down chart to return to the Chart view.

The 'Forecast' tab presents the sales opportunities in monthly graphs, split in 4 quarters. The user can choose the quarter from the drop-down list which is located in the left corner, under the tabs. Like in the 'Quarterly' tab, if you want to see a type of opportunity, you click on the assigned color for this type and the 'Drill Down' tab will be open.

We hope the Opportunity metric dashboard will help you to have a clear vision of your sales progress, easy access for updating information and make sure no Opportunity gets overlooked.

6.15   Working with the Project Manager
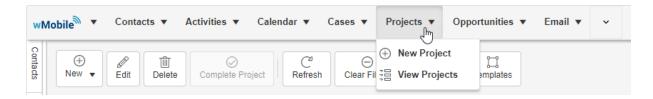
Using Projects in wMobile Desktop

The Project Manager in wMobile is available to help users work with and maintain projects that are simple or complex having many components. As an example, a wMobile installation project may potentially involve a few contacts, several appointments to get things scheduled, several files may be used for reference, and so on. With a project, all of these components are consolidated into one central location to make the components of a project easy to find, navigate, review, and update. Projects may be assigned stage values and status values to track progress as well as start and end dates. As you see what Projects has to offer, you may find it useful to use.

See the links below:
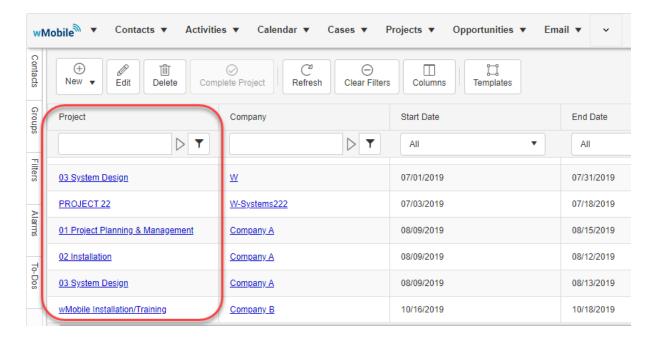
[View Projects](#)
[New Project](#)
[New Project Template](#)
[Working with Project Tabs](#)

6.15.1   View Projects
Project menu:
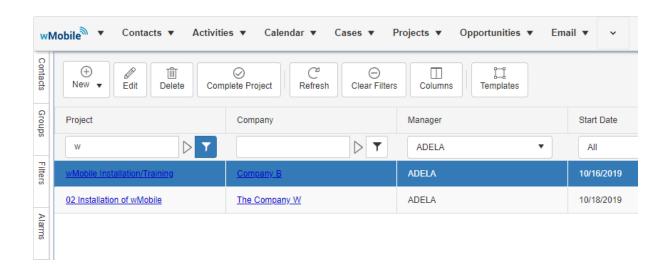
To work with existing Projects in wMobile, click **Projects** on the toolbar and select **View Projects**:

wMobile will display the **Project List** screen and will list the projects. Please note that the projects can be filtered by typing into the filter field and pressing enter (the funnel button allows the user to change the scope of the value searched for within the field; this is typical for most columns in the **Project List**):
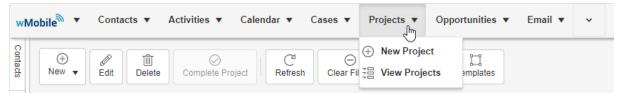
Other columns in this view display information for **Start Date**, **End Date**, **Age**, **Status**, **Stage**, etc.

The tool buttons allow a user to create a new project, edit an existing one, complete the selected project, refresh the list of projects, or delete one (after selecting a row in the list, click the appropriate tool button), or to open the Project Templates lists:
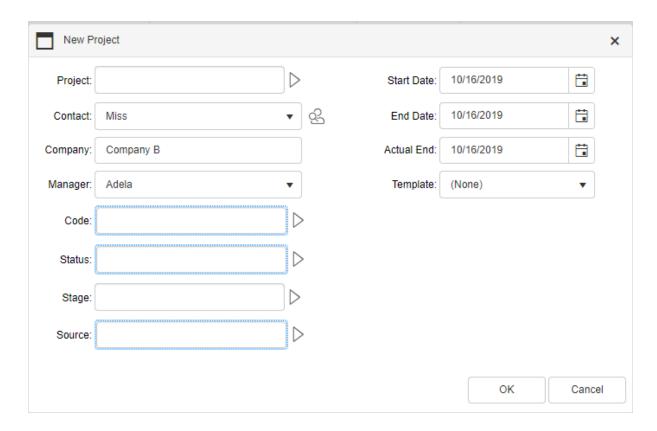
6.15.2 New Project

Project menu:

To Create a New Project, click the **New** button and select **New Project.**
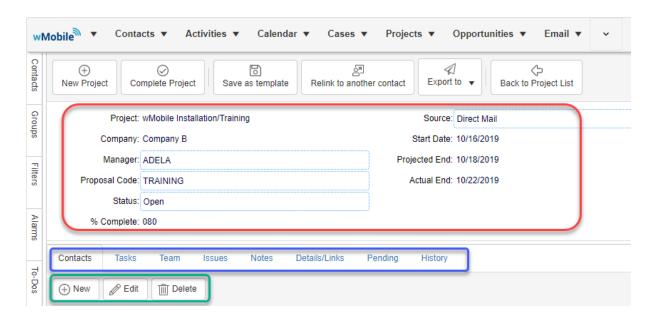
Enter the "main" project information in the New Project dialog box. This information will be displayed in the **Project List**. Other components and details that need to be related to the project are added after the project is created.

Clicking on the arrow icon opens a lookup list to select a pre-defined value from. However, the user can type directly into the field (free form) if that is desired. The **Manager** drop-down field contains a list of users to select from. The three date fields can have their values set using the calendar button to open a date selector.

After all of the information is entered, click **OK** to create the project.

Once the project is added and appears in the **Project List**, click on the project name to view its details (in **red** frame):
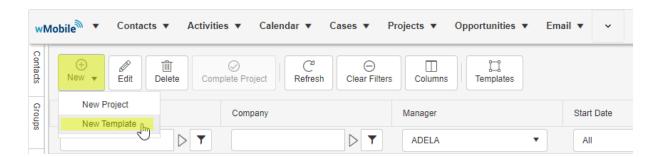
Users can manage the components and details of the project using the tabs (shown above in the blue frame). Each of the tabbed views contains a toolbar typically containing the tools: **New**, **Edit**, and **Delete** for working with the data within the specific tab (tools are shown above in the **green** frame).
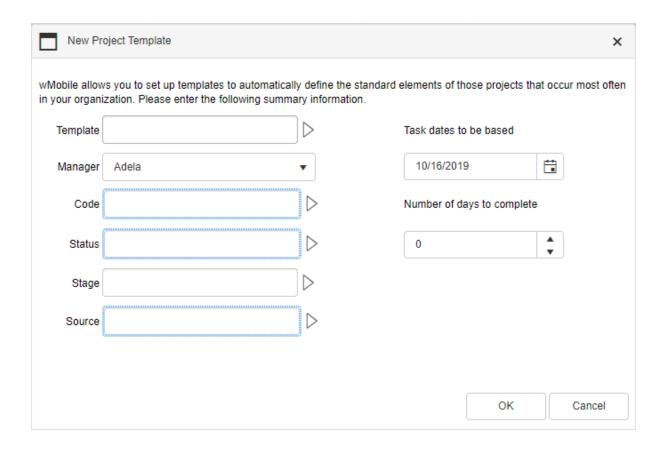
See Working with Project Tabs.

6.15.3 New Project Template
To Create a New Project Template
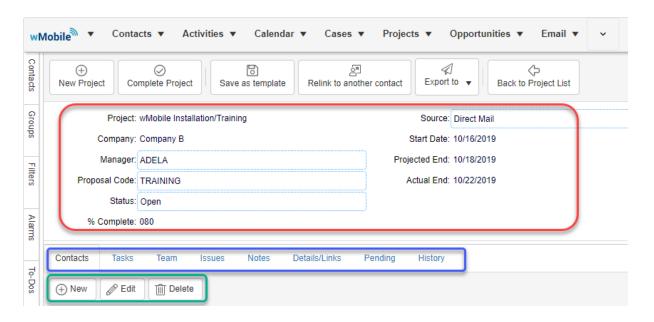
Click the **New** button and select **New Project Template** to open the **New Project Template** dialog:

6.15.4 Working with Project Tabs (Desktop)

In the following examples, the sample project named: **wMobile Installation/Training** linked to company "**Company B**" (seen in the **Project List** above) will be used.

Users can manage the components and details of the project using the tabs (shown above in the blue frame).The same tabs are available in wMobile Desktop as in GoldMine to track information related to the Opportunity including Contacts, Task, Team, Issues, Notes, Details/Links, Pending, and History.
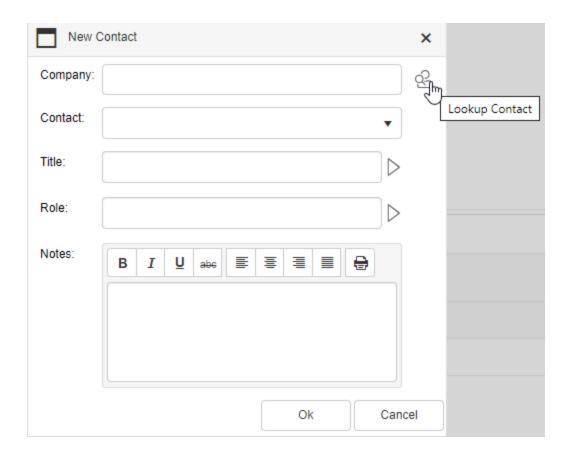
Each of the tabbed views contains a toolbar typically containing the tools: **New**, **Edit**, and **Delete** for working with the data within the specific tab (tools are shown above in the **green** frame).

Contacts:

Add one or more contacts that should be associated with the project. These may be anyone in your database that has a part in the project. Use this to add sales staff, IT techs, vendors, purchase agents, prospects, etc. If the contact you want to add does not exist in your database, it can be added without leaving this tab. To add a contact to the project, click the **New** button to open the **New Contact** dialog.

	Company	Contact	Title	Role
	Company B	Miss	Buyer	Negotiating
	ABC	Jack Jones	Building Owner	Contractor Electrical

On the **New Contact** dialog, search for a contact using the Lookup Contact button. In the **Lookup Contact** dialog presented, search for the contact to add to the project, or use the **Add Contact** button to add a new contact to the database and then to the project.

Tasks:
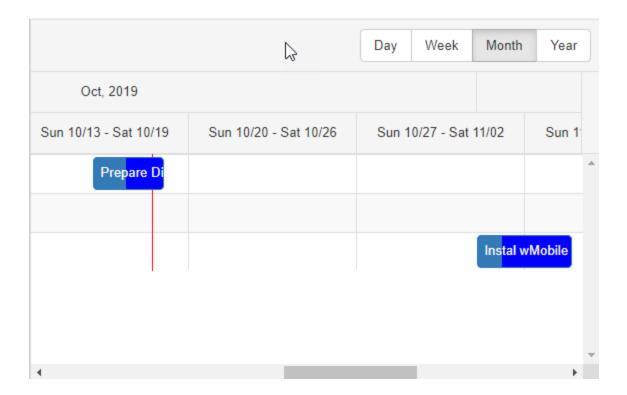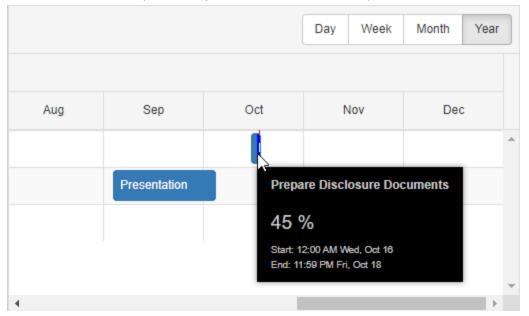
Schedule actions to take place for the project. The specific tasks can be assigned to specific users. The area below the tabs displays, from left to right, the tasks:
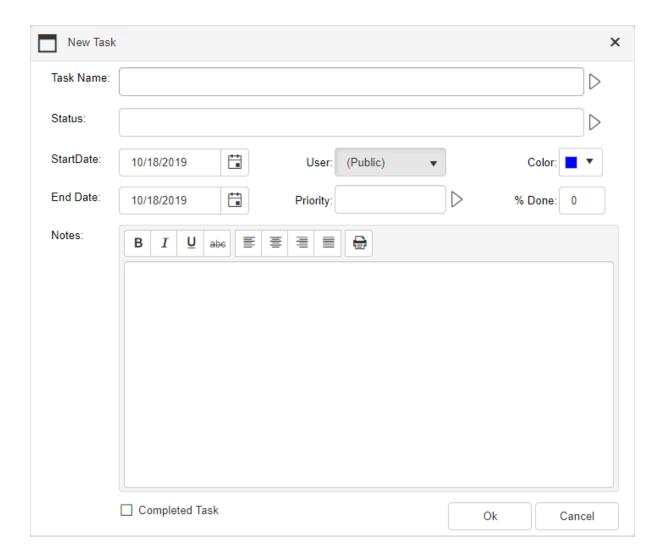
... the progress of each task:

.. and a Gannt chart (all side-by-side across the screen):

Start Date and **End Date**, **Priority**, **% Done**, **Notes** and **Color** can be set for each task using the **New Task** dialog:

Team:
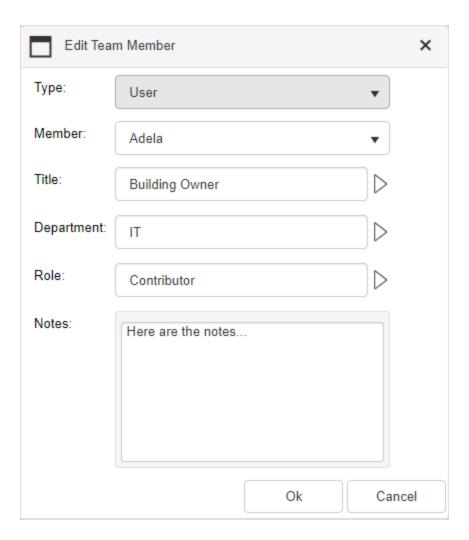
Create a "Team" for the project on the **Team** tab. A team can consist of GoldMine users and/or contacts that are going to be contributing to the project.
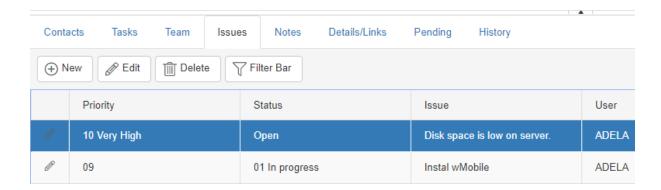
Following is a screenshot of the **Edit Team Member** dialog (the row was selected and **Edit** tool was clicked). The **Type** field allows the user to select either a GoldMine user or a contact and set them as a team member (GoldMine user for "Type" is shown here):

Issues:
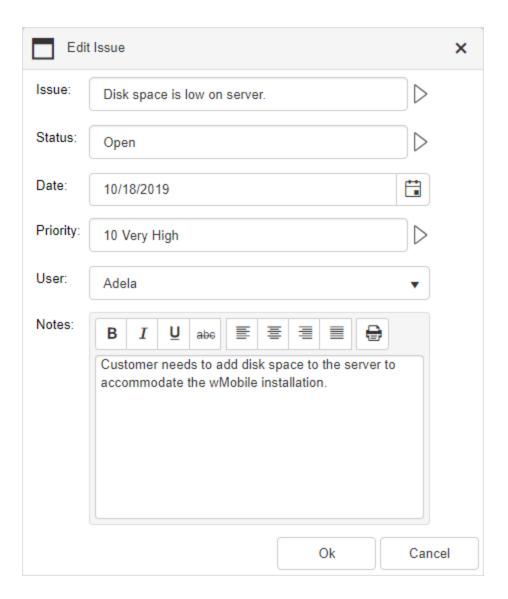
If there are and issues hampering the success in completing a project, they can be tracked against a project too. Here is an example of a problem that needs to be addressed (there is also a **User** column that is not shown in this screenshot):
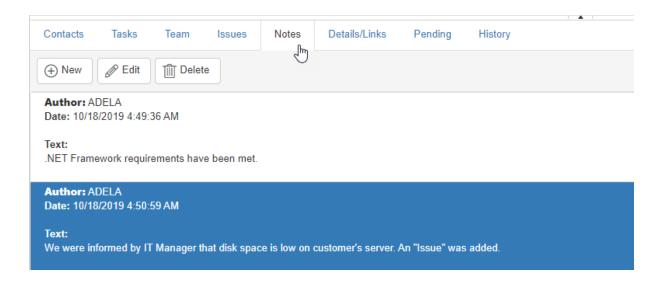
	Contacts	Tasks	Team	Issues	Notes	Details/Links	Pending	History	

	Priority	Status	Issue	User
	10 Very High	Open	Disk space is low on server.	ADELA
	09	01 In progress	Instal wMobile	ADELA

This screenshot of the **Edit Issue** dialog shows the information entered for the issue at hand. Here we can store and view notes pertaining to the issue:

Notes:

Notes are an important part of project management. The **Notes** tab gives users a place to store and edit free-form notes. After a note is created, the **Author** and **Date** values are set by wMobile:
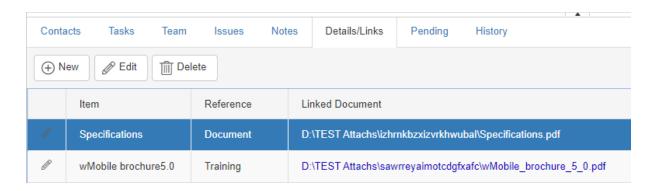
To add/edit notes, the **Add/Edit Note** dialog is used (the top of the **Edit Note** dialog is shown here; not shown are the **OK/Cancel** buttons):
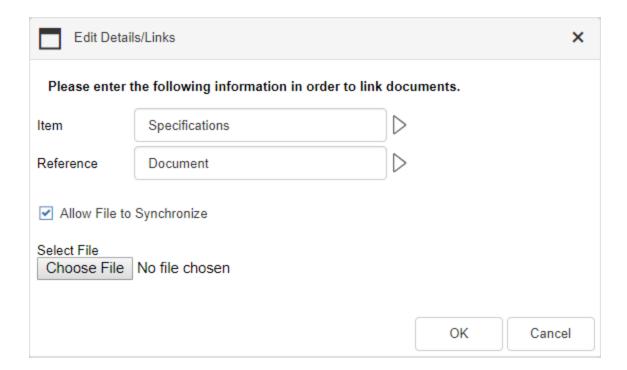
Details/Links:

This tab allows a user to enter very simple details consisting of two fields, **Item** and **Reference**, and the ability to "optionally" link a document to the record. If a file is linked to a record, the **Linked Document** path can be clicked on to download the file for use (i.e., if the device running wMobile supports the file format).
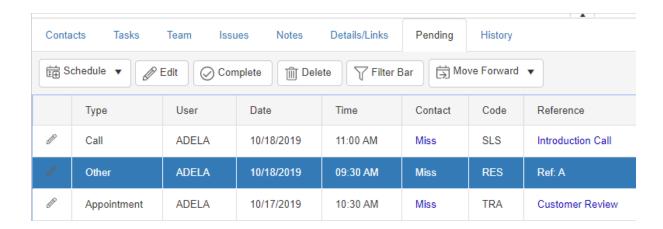
Displayed here is the **Edit Details/Links** dialog. Use the **Choose File** button to select a file to be linked to the project. In our example of the **wMobile Installation/Training** project, we've linked a file containing the license/serial number to have handy when needed during the installation of wMobile.
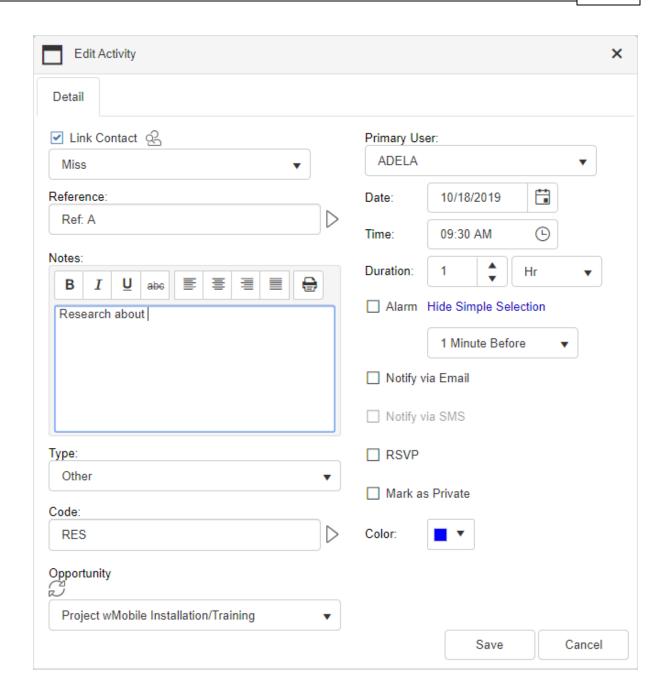
Pending:

In any given project, there are always items that need to get done. When something needs to be scheduled, the **Pending** tab is the place. The **Schedule** drop-down on the **Pending** tab allows a user to schedule a **Call**, **Appointment**, **Other**, **Next Action**, **Forecasted Sale**, or **Event**. Also available on this tab is: (1) the ability to Complete an activity, (2) filter the activities being viewed using the **Filter Bar**, and lastly, (3) a user can move an activity forward to a different date using the **Move Forward** drop-down which contains a pre-defined list of date increments (i.e., various numbers of days) or a date picker to easily set a specific date:

	Type	User	Date	Time	Contact	Code	Reference
✎	Call	ADELA	10/18/2019	11:00 AM	Miss	SLS	Introduction Call
✎	Other	ADELA	10/18/2019	09:30 AM	Miss	RES	Ref: A
✎	Appointment	ADELA	10/17/2019	10:30 AM	Miss	TRA	Customer Review

Contacts   Tasks   Team   Issues   Notes   Details/Links   Pending   History

Schedule ▼   Edit   Complete   Delete   Filter Bar   Move Forward ▼
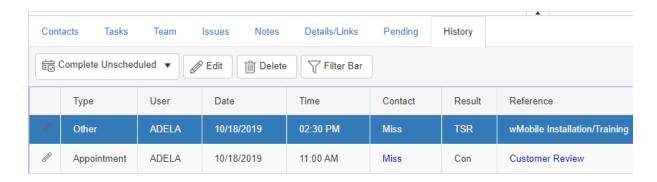
Clicking the **Edit** button with a row selected on the **Pending** tab opens the **Edit Activity** dialog (note the fields available for your information):

History:
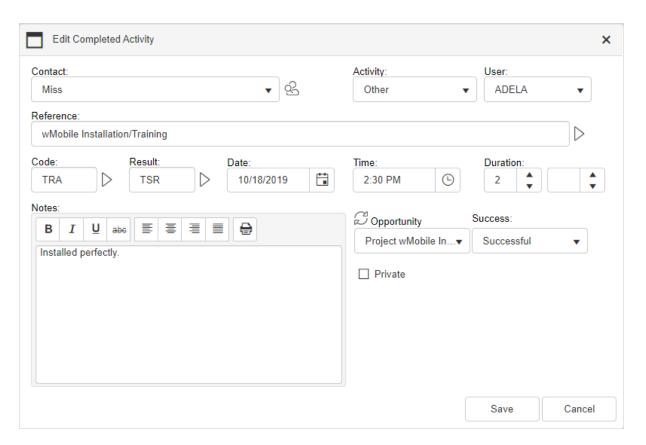
Another important aspect of project management is history related to it. We need to be able to refer to items that have been completed. After a pending activity is completed it becomes a history record. The **History** tab displays completed activities for the project. Please note that there will be times when an action is taken for a project that was not previously scheduled (i.e., no pending activity exists). In those cases, users can use the **Complete Unscheduled** drop-down to create a history record on-the-fly. The choices in this

drop-down are: **Call**, **Appointment**, **Other**, **Next Action**, **Letter/Memo**, **Literature Request**, **Forecasted Sale**, or **Event**.

Clicking the **Edit** button with a row selected on the **Pending** tab opens the **Edit Completed Activity** dialog (note the fields available for your information):
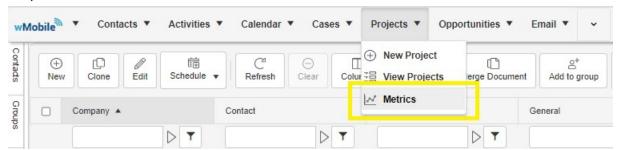
6.15.5 Project Metrics
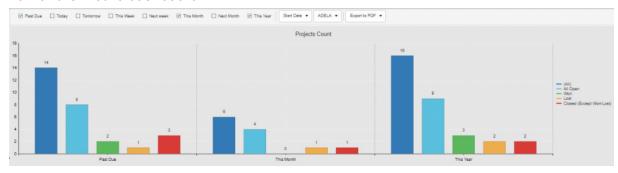
The metrics dashboard in wMobile for GoldMine provides interactive data information. This data is represented in new graphs and charts. The projects can be easier to track, analyze, and summarize in these metrics.

The metrics dashboards are found in the 'Projects' tab, click on 'Metrics' from the dropdown list:

Project metrics include two significant areas. The first graph represents the Projects Count, and by default, all types of projects are presented. The legend of the colors is detailed on the right side. The project types are displayed or hidden by clicking on the specified color. This same selection method is used for the donut Charts on the bottom half of the metric dashboard.
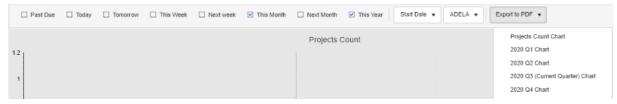
For the counted projects, you can select different periods of time, by clicking the checkboxes above the graphs. These can be displayed by 'Start Date', 'Closed Date' and 'Actual End'.

You can choose for which user you want to display the project graphs. (Note: Access will be determined by permissions set in GoldMine).

Each chart can be exported in PDF format.

Click on a bar in the chart to drill down to a list of the Projects. The Details tab includes hyperlinks to navigate to the Project detail record, Company or Contact. Select the Charts tab to return to the list view.
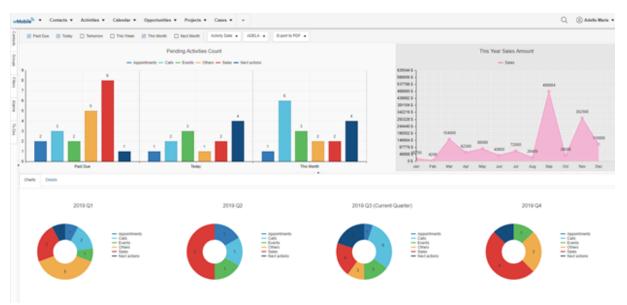
6.16   Working with Dashboards

wMobile 5.0 introduces the use of new dashboards for user to track Activities, Cases, Opportunities, and Projects.

[Activity Dashboard](#)
[Cases Dashboard](#)
[Opportunities Dashboard](#)
[Projects Dashboard](#)
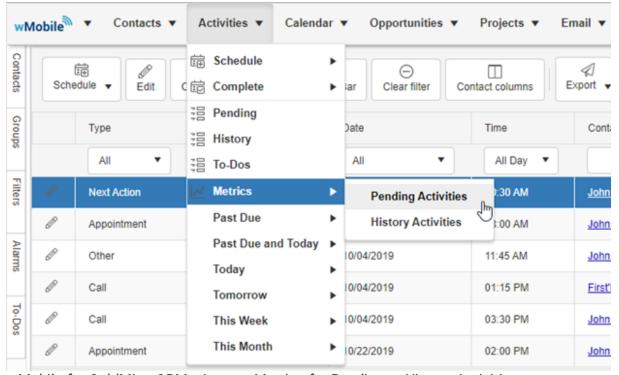
6.16.1 Activity Dashboard

Starting with Fall '19 in wMobile 5.0.0.334, wMobile Desktop for GoldMine includes a new functionality on Activities: Metrics. These metrics contain modern graphs and charts which can be selected on time intervals, for pending activities and history activities.

wMobile for GoldMine CRM - Pending and History Activity Metrics Dashboard

The metrics are found in the 'Activities' tab, click on the dropdown list, choose Metrics > Pending Activities or History Activities.

wMobile for GoldMine CRM - Access Metrics for Pending or History Activities

Pending Activities metrics include three areas. The first graph represents the Pending Activities Count and, by default, all types of activities from that day (Today) are displayed.
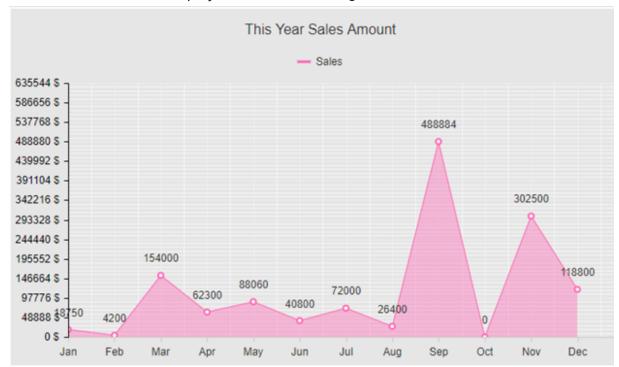
The user can choose which period of time they want to include in the graph from the checkboxes included in the menu above this graph.

If you don't want to view an activity type, you on it to temporarily deselect it.

wMobile for GoldMine CRM - Pending Activities Count
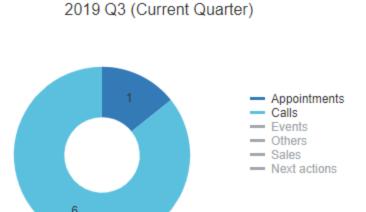
The second area displays the This Year Sales Amount chart. This chart represents the forecasted sales and their projected amounts, using a month interval.

wMobile for GoldMine CRM - Current Year Sales Chart

In the last area, we find the donut charts that represent all activity types. These are split into four Quarters, which represent the four quarters of a year. By default, all types of activities are displayed. You can also deselect a type by clicking on it.

For example, if you want to display in the Current Quarter, the appointments and calls, you can click on Events, Others, Sales and Next actions. These will get disabled and will be shown in gray.

wMobile for GoldMine CRM - Current Quarter Activities Donut Chart

The legend of colors described on the right side of the donut helps the user identify each type of activity. If you click on the color assigned to Calls, the Details drilldown tab is opened with all call activities. In this tab, you can also complete, edit or delete an activity.

After each action, the charts will be reloaded. The Delete action respects GoldMine record deletion permissions.

wMobile for GoldMine CRM - Activity Metrics Settings

In the metrics menu from above, we will find 3 more buttons/dropdown lists.
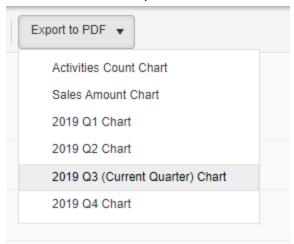
The activities graphs can be filtered by date (the Activity Date, Created Date and Modified Date) and these filters affect the graphs for the Pending Activities Count and for donut charts.

Also, the user can be selected for whom the graphs will be displayed.

wMobile for GoldMine CRM - Activity Metrics Filters

Each chart can be exported in PDF format.
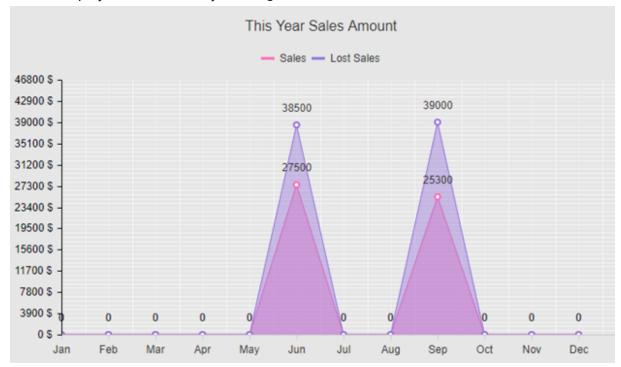
wMobile for GoldMine CRM - Export Activity Metrics Charts as PDF

The History Activities Metrics display the same types of charts with the same functionalities.

wMobile for GoldMine CRM - Past Activity Metrics

The only difference is on the This Year Sales Amount chart, where the user finds the completed sales which include completed and lost sales. The sales type (closed or lost) can be displayed or disabled by clicking on it.

With the new metrics on activities, the user will have a better view of activities from the pending and completed lists.
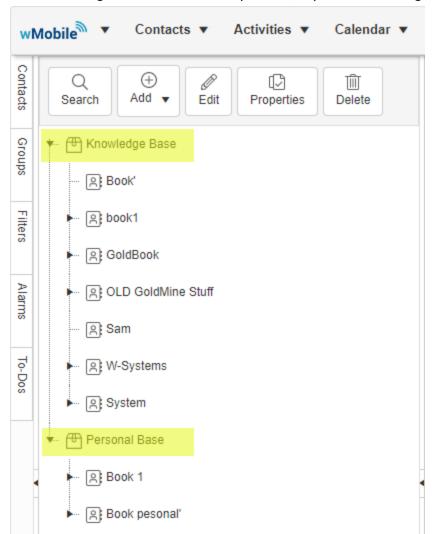
6.17   Working with the Knowledge Base

Usage

The Knowledge Base provides a resource for maintaining any type of information useful to an organization or an individual. The Knowledge Base can be accessed from the navigation menu bar. If this option isn't in the first commonly used menu items, check the down arrow at the end of the menu bar for more options.
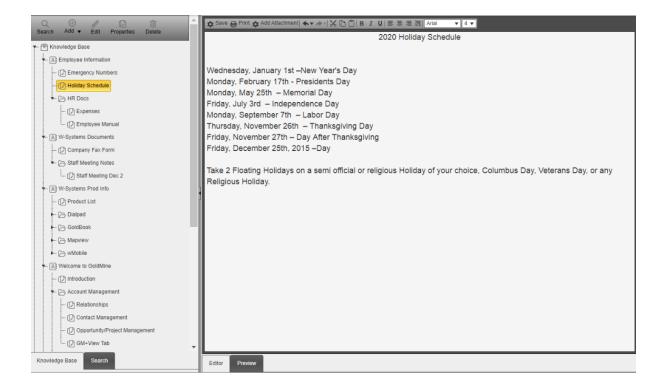
The Knowledge Base has two components, a public Knowledge Base and a Personal Base.

The public base contains general information relevant to staff and clients and can contain information like company policies, product prices, press releases or any other general information. The personal base contains information for the individual user and can contain personal notes, special personal events, or any other type of personal information. Both bases are structurally the same and operate in the same way. The reading and writing access are determined by users with master access.
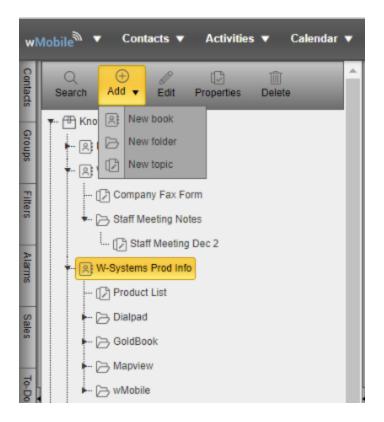
Structure

The graphic interface is structured into two sections, the left side that contains the Knowledge Base tree functionality and the right side that contains the items content.

6.17.1   New Knowledge Base entries
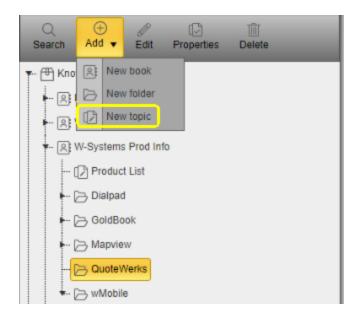
The Knowledge Base contains books, folders and topics. To add a new entry in the Knowledge Base, select the area where you wish to add use the **Add** button on the tree menu (or right click on the entry in the tree view). Choices will include **New Book**, **New Folder** and **New Topic**.
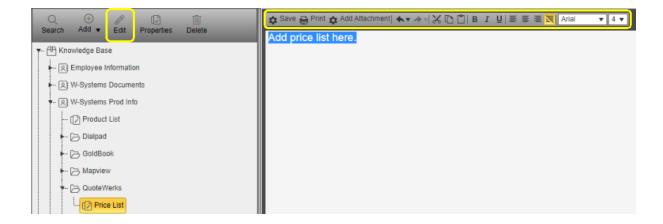
In this example, a new folder will be added.

Repeat the process to add a New Topic.

Select the book, folder or topic and select **Edit** to make changes. Use the Knowledge Base menu to format text, **Add Attachment** and **Save** when the topic is complete.

7   Troubleshooting

Troubleshooting wMobile:

- [wMobile Diagnostics Tool](#)
- [Account is Locked](#)
- [Cannot find license file](#)
- [Change wMobile Port](#)
- [Duplicate Lookup Header Warning](#)
- [Internet Service Provider (ISP) Has Changed](#)
- [ISAPI Filter Troubleshooting](#)
- [Migrating wMobile to a New Server](#)
- [No connection could be made because the target machine actively refused it](#)
- [SQL Password Changed](#)
- [Troubleshooting Email Accounts](#)
- [User Cannot Log into wMobile](#)

7.1   wMobile Diagnostics Tool

OVERVIEW:

The **wMobile Diagnostics Tool** is designed to assist wMobile administrators in identifying configuration problems. This tool also has the capability to send a diagnostics report and associated wMobile log files to wMobile Support for review when needed. The wMobile Diagnostics Tool also has a [Repair](#) command which is able to correct some common issues reported by this tool.

Running the wMobile Diagnostics Tool
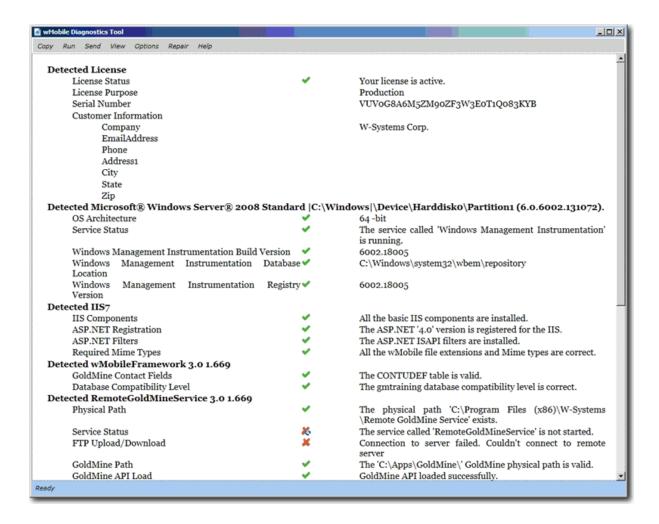
During a wMobile installation or upgrade, the wMobile Diagnostics Installer Wizard prompts the user to **Run wMobile Diagnostics**. Running this tool is optional but highly recommended after an installation/upgrade to check for success. However, this tool can be started at anytime after an installation by using its shortcut from the Windows Start menu.

To run the wMobile Diagnostics Tool, select **Start > All Programs > W-Systems > wMobile Diagnostics > wMobile Diagnostics**.

While the **wMobile Diagnostics Tool** is opening, it runs a set of diagnostics against your wMobile system and displays a screen containing the results. Following is a key describing the various status symbols displayed for the results.

✔ **Success**: This symbol designates that the item is meets requirements.

⚠ **Warning**: This symbol designates that error logs exist in the log files.

✖ **Critical**: This symbol is identifying a critical issue with an item. This issue will need to be addressed manually.

✖ **Critical/Repairable**: This symbol is identifying a critical issue with an item. This issue can be fixed using the [Repair](#) command.
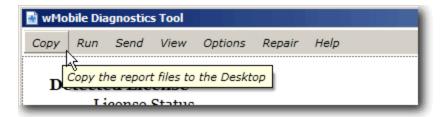
In the following example, the Remote GoldMine Service is shown as "not started" (✖) and a connection to a remote server failed (✖):

Using the wMobile Diagnostics Tool
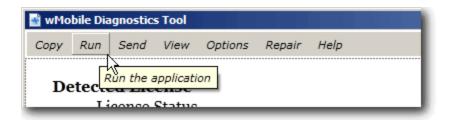
Create wMobile Diagnostics Report File

Click **Copy** to create a copy of the report as an HTML file and place it on the server's Desktop. The resulting file will be named: **HtmlDiagnosisReport.html** and can be viewed in a browser by double-clicking it.

Run the wMobile Diagnostics Tool

Although the wMobile Diagnostics Tool runs the diagnostics when it is started, you may optionally want to run it again once it's opened after making configuration changes to wMobile to see if they were successful. Clicking **Run** will re-run the diagnostics and display the new results.

Send wMobile Diagnostics Report and wMobile Log Files to wMobile Support

A support technician might request the report and log files using the wMobile Diagnostics Tool. Clicking **Send** will email a copy of the report and the wMobile log files to wMobile Support.

> ⚠ **IMPORTANT**:
>
> If you are not able to submit the diagnostic by using the **Send** command, this is usually due the port being blocked on your server.
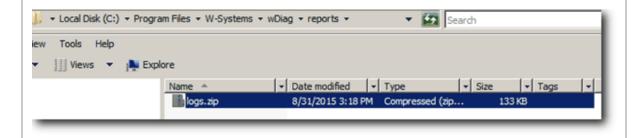
When the **Send** command is unsuccessful, the diagnostic report and logs are compressed into a file that can be forwarded manually via email to goldminesupport@sugarcrm.com. If wMobile was installed to the default folders during installation, the file will be found in the following folder:

`C:\Program Files\W-Systems\wDiag\reports`
- or -
`C:\Program Files (x86)\W-Systems\wDiag\reports` (on a 64-bit operating system)

The file name is **logs.zip**:

If you need further assistance, please contact wMobile Support. Please see our Contact Information for details.
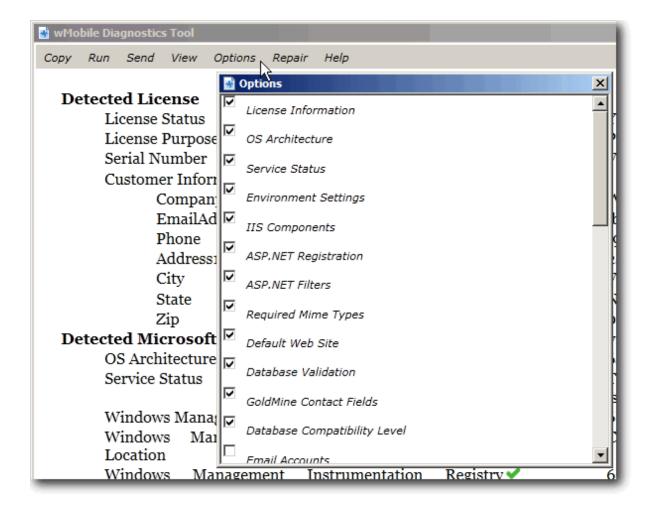
Viewing Logs

To view log files, click **View** on the main menu and then click the appropriate log to view.

Filtering the Results Displayed

To filter the components tested and displayed in the wMobile Diagnostics Tool, click on **Options**. Next, use the checkboxes to enable/disable the items to be displayed.

Repairing wMobile

Clicking the **Repair** command on the main menu will attempt to correct some of the common issues that are reported by the wMobile Diagnostics Tool. Issues that **Repair** will try to correct are designated with the 🛠 symbol.

As an example, let's consider that the Remote GoldMine Service was found with a red 🛠 symbol (meaning it is not running). After clicking **Repair**, the following **Checks to Repair** dialog will display listing the items to be fixed:

Click the **Repair** button (not shown) on the dialog to start the repair process. The dialog will update after running the repair. Please note the highlighted "Fixed" result indicating the repair was successful.

After closing the **Checks to Repair** dialog, the wMobile Diagnostics Tool will run and refresh the display.

7.2   Account is Locked

OVERVIEW:

When a user is logging into wMobile and enters an incorrect password more than a specified number of times (the default is 3), that user will be locked out of wMobile. This is a security feature and the access lock for this user needs to be reset before the user can regain access. This number of attempts allowed can be adjusted in the wMobile Manager Console.
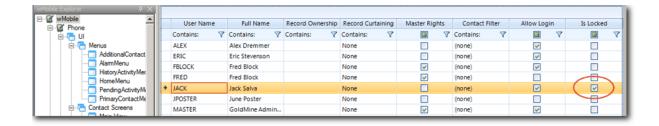
PROBLEM:

After failing to log in using the maximum number of attempts allowed, the user will receive a message similar to this:

Login Failed.Account is locked after repeated login failures. Please contact your wMobile administrator to release the lock.

RESOLUTION:

1. Log into the **wMobile Manager Console**.
2. Open the User settings by selecting the **wMobile** node in the **wMobile Explorer** window and then double-clicking the **Users** icon.
3. Remove the check from the **Is Locked** column for the appropriate GoldMine user you want to unlock.
4. In the **Actions** window, click **Save**.
5. Close the **wMobile Manager Console**.
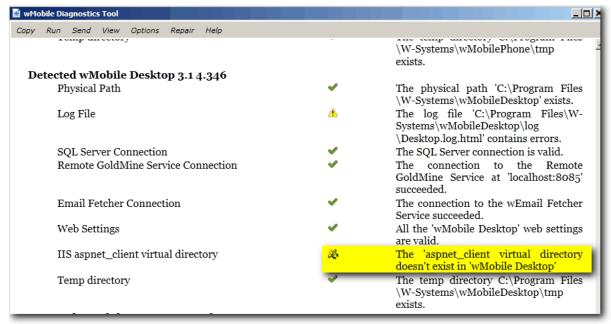
MORE INFORMATION:
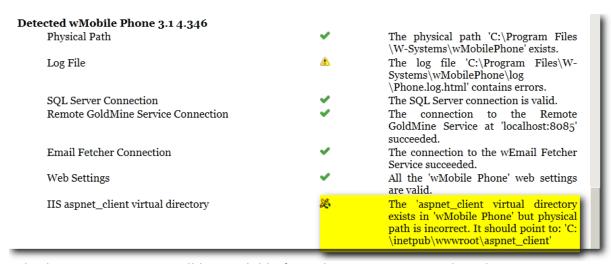
The maximum number of failed login attempts allowed is configured in the **System Settings** using the MaxFailedLogins property.

7.3 aspnet_client is Missing or Not Pointed to the Correct Location
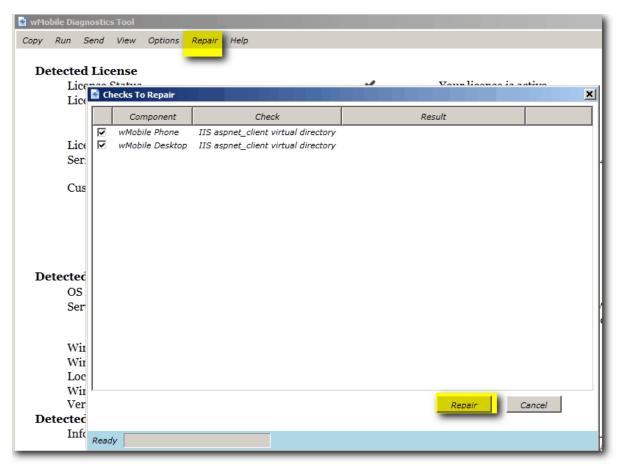
wMobile uses the aspnet_client resources in IIS. If the virtual directory is missing in IIS, or is not pointed to the correct location, there will be a warning in the wDiagnostic.

If the directory exists, but is not pointed to the correct location, the error would appear as shown below.

In both cases, an option will be available from the Repair menu. Select the option to Repair in the bottom of the window.

When the box shows the result as Fixed, the box can be closed.

7.4   Cannot access Login Page
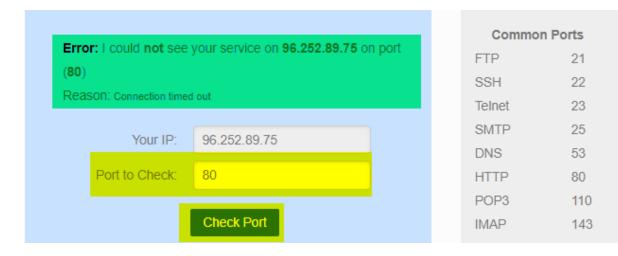
Our first step when a customer reports they can't reach the login page is to test wMobile on the server where it's installed.

If the login page doesn't come up directly on the server either, then there's a configuration issue with wMobile. Reach out to your wMobile reseller or run the wDiagnostic tool and use the SEND option to submit to wMobile Support.

If the login page comes up on the server and wMobile works as expected, then it's probably an issue with the firewall, such as a blocked port.

There are a variety of port testing tools available to test whether a port is accessible. In default wMobile installations, wMobile is installed using port 80 or port 443 (if you're using an SSL certificate and access wMobile using a https web address). Another port could have been selected during installation or might be changed after initial implementation. One such tool is available at www.canyouseeme.org. (Be advised this is a free tool and the web site contains advertisements.)

Enter the **Port to Check** based on the port in use for wMobile at your company and select **Check Port** as highlighted in yellow below. The result will be posted as highlighted in green. Port testing tools are not 100% foolproof based on firewall settings, but it shows a high probability that the port is blocked and/or the port needs to be mapped to direct traffic to the wMobile server. Consult with your IT staff or your Internet Service Provider to have the port opened and mapped accordingly.

Error: I could **not** see your service on **96.252.89.75** on port (80)
Reason: Connection timed out

Your IP: 96.252.89.75

Port to Check: 80

Check Port

Common Ports	
FTP	21
SSH	22
Telnet	23
SMTP	25
DNS	53
HTTP	80
POP3	110
IMAP	143

Reasons for external access problems can include needing to open a port or configure a port mapping to direct traffic to the wMobile server. This might be on initial installation or after a change such as switching internet service provider, getting a new modem, or after migrating wMobile to a new server.

7.5   Cannot find license file

PROBLEM:

Errors such as "*The GoldMine API failed to load*" or "*Cannot find the GoldMine license file*" might be seen when launching wMobile Phone, wMobile Desktop, or the wMobile Manager console. They might be seen in the logs, or possibly on initially installing the Remote GoldMine Service.

CAUSES:
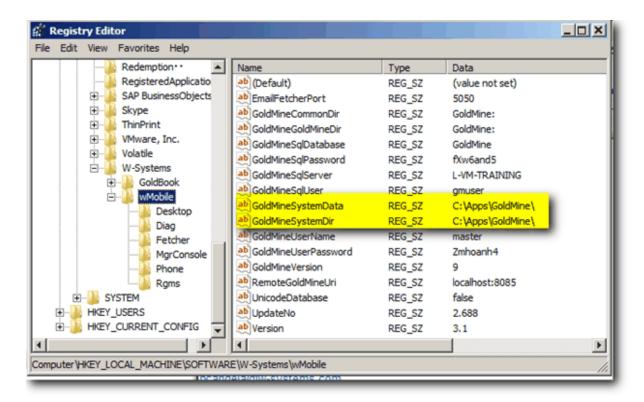
1. The settings referring to the GoldMine folder might be incorrect.
2. More often, the issue is related to problems accessing UNC or drive mapped paths to GoldMine.

RESOLUTION:

Open GoldMine. From the main menu, select **Help > About GoldMine > System** button:

QUESTION: Do the GoldMine files (i.e., **System Files** in the About GoldMine dialog) reside on the same server with wMobile, or is GoldMine on another server?

If GoldMine is on the same server as wMobile, then the path in the registry should be the local path such as shown in the example below.

The Remote GoldMine Service will start in the local location and follow pointers in the gm.ini such as the ones below:

```
RealIni=G:\GoldMine\gm.ini
SysDir=\\LVM-TRAINING\GoldMine\gm.ini
```

Any drive mapped or UNC paths must be accommodated in the Virtual File System Settings. If GoldMine resides on another server, then the Remote GoldMine Service will need Windows credentials to access GoldMine files across the network. This would be configured using the Virtual File System Settings within the wMobile Manager Console. Please see the topic on Virtual File System Settings.

> 🗒 **NOTE**: In new installations, the wMobile Manager Console does not require GoldMine authentication with a username and password. This allows login to the

> wMobile Manager Console to configure Virtual File System Settings to access GoldMine files such as the executable, dlls, and license file.

If further assistance is needed, please contact your wMobile reseller or goldminesupport@sugarcrm.com.

7.6 Change wMobile Port

If it is determined after wMobile is installed, that another port must be used, the port used should be updated in two places.

1. The port should be updated in IIS. It will apply to all applications in the website. For example, if you change the Default Web Site port, it would apply to any web applications installed into the Default Web Site. (It is also possible to create a separate website for wMobile. Email wMobile support at goldminesupport@sugarcrm.com for further information.)

To change the port in IIS, open IIS and select the website in the navigation pane on the left. Select **Bindings** in the Actions pane. Select **Edit** to change the port as needed. Click **OK** to save your changes.
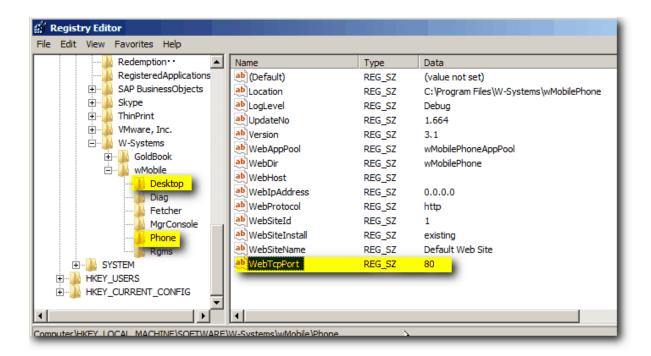
2. The port should be updated in the wMobile Phone and Desktop keys in the Windows registry.
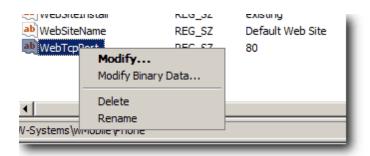
Open the registry and navigate to:

HKEY_LOCAL_MACHINE\SOFTWARE\W-Systems\wMobile

The Phone and Desktop keys have a value for the **WebTcpPort** entry.

Right click on **WebTcpPort** entry and select **Modify** to change the port number. Click **OK** to save your changes.

Make this change to the **WebTcpPort** entry for both the Phone and Desktop keys.

7.7   Considerations When Upgrading GoldMine

When upgrading GoldMine, you must have exclusive access to GoldMine tables. Any applications that access the GoldMine tables such as GoldSync and the wMobile services must be closed as well. To stop the wMobile services, select **Start > Run**. Enter **services.msc** in the field and press **Enter** or click **OK**.

There are two (2) wMobile services: **Remote GoldMine Service** and **wMobile Email Fetcher**. Stop these services during your GoldMine upgrade. Restart them after the upgrade has been completed.

7.8   Duplicate Lookup Header Warning

OVERVIEW:

A warning might appear when logging into the wMobile Manager Console:
"wMobile Manager Console Warning - wMobile identified duplicate lookup headers in your GoldMine installation. Some features in wMobile may not work properly until the problem is corrected. Please fix the duplicate lookup headers in the Manager Console"

PROBLEM:

GoldMine has duplicate lookup headers, which were likely caused by synchronization in the past.
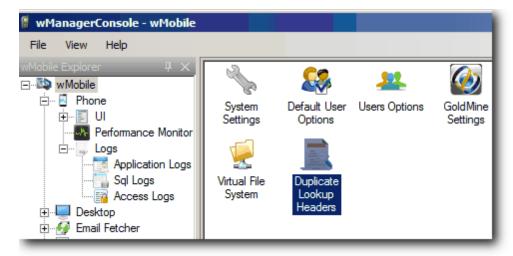
DISCUSSION:

In GoldMine, the F2 lookups can be configured to allow blanks, force valid inputs, etc. These settings are stored in a header record in the LOOKUP table. If you have duplicate headers, this means that you have two or more records that indicate what the settings for a particular F2 lookup should be. Duplicate lookup headers are somewhat normal if you are installing wMobile on a copy of GoldMine that has been synchronized. It happens when two users alter or create the F2 lookup settings on two different instances of GoldMine. Since each system is not aware that the settings have been created on the other, they both create a header record. When the systems are synchronized together, the server GoldMine will then contain two (or possibly more) header records.
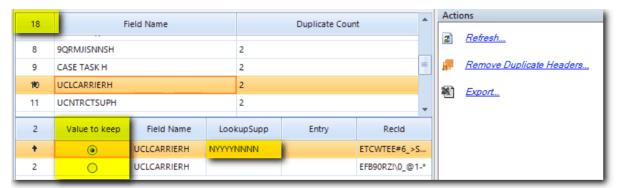
wMobile doesn't handle duplicate lookup headers - the result will be that for any F2 lookup where there are duplicate headers, wMobile will list the values in the drop-down, but not apply any of the settings.

RESOLUTION:
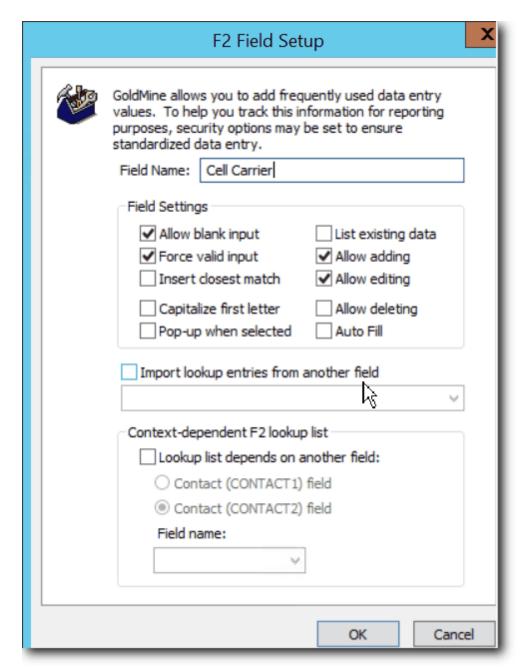
wMobile has a tool built into the Manager Console that can remove duplicate headers.

The Duplicate Lookup Header tool will display a list of fields that have duplicate headers. In this case there are 18, as highlighted in the screenshot below. If there's more than a few, there will be a scroll bar to scroll down the fields. For each entry on the list, select one to keep. If there's YN type data in the LookupSupp field as in the example below, it indicates values have been set for the field such as allowing blank input, requiring input from the lookup list, etc. Select the value you wish to keep.

Administrators will be able to check the field settings in GoldMine as in the example below.

When the list has been reviewed, select **Remove Duplicate Headers** in the Action pane to remove the duplicate headers (i.e., the headers you have chosen NOT to save).

The wMobile Manager Console will create delete sync stamps for the header records that were deleted and an updated sync stamp for the ones you are saving to enforce the selection on all of the remote, synchronizing GoldMine intances.
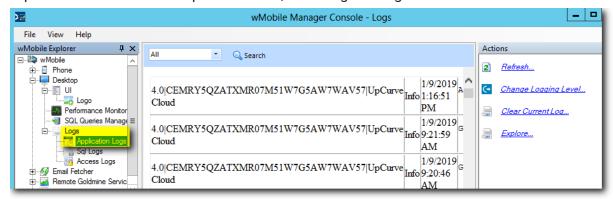
Once you have completed this procedure, you won't see the warning on logging into the wMobile Manager Console.

7.9   Increase Logging Level
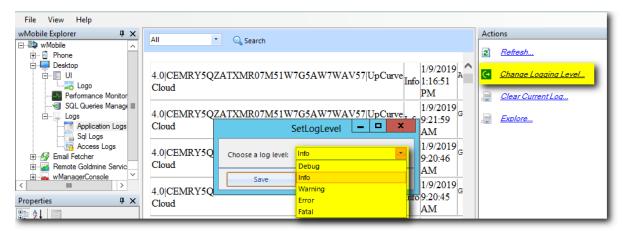
Each component in wMobile has logs: Phone, Desktop, Email Fetcher, Remote GoldMine Service, and wMobile Manager Console. Occasionally, we need to increase logging levels for troubleshooting purposes. Each component can be seen in the wMobile Explorer pane of the wMobile Manager Console.

Expand the component where additional logging is needed. In the example below, we've expanded the wMobile component folder, including the Log folder.
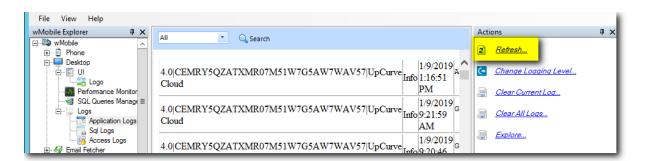
Select **Change Logging Level** and set the desired level of logging. Info is the default. Debug is the level used for debugging application errors.

Select **Save** when the selection is complete.

If a problem is reproducible, try to reproduce the problem in the component where it's occurring. Afterwards you can examine the logs by selecting **Refresh** or submitting the wDiagnostic to send the logs to the wMobile support team at goldminesupport@sugarcrm.com for review.
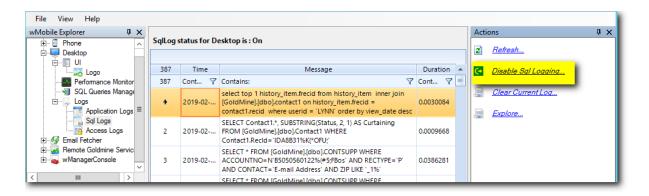
Note: A Debug logging level should be left for a short time, maybe up to a few days to try to capture more logging when an error occurs. It shouldn't be left at this verbose logging level indefinitely.

Sometimes additional SQL logging can be helpful. The SQL logging settings can be found just below Application Logs in the wMobile Explorer pane for each component. Select **Enable SQL Logging**.

To disable SQL logging after the problem has been reproduced and the log is captured, select **Disable SQL Logging**.
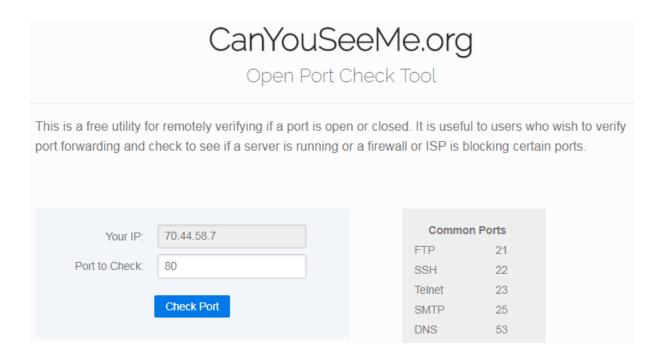
7.10   Internet Service Provider (ISP) Has Changed

When you change ISPs, you get a new external IP address. You can use a tool such as www.canyouseeme.org to determine the external IP address you need to use. The wMobile addresses follow the patterns shown below. You need to replace the "**ExternalIP**" value in the pattern with your actual external IP address. No changes need to be made to wMobile settings on the server, only to the address that is used to access wMobile.

http://**ExternalIP**/wMobilePhone
http://**ExternalIP**/wMobileDesktop

If these addresses don't resolve to the login page, try using a tool such as www.canyouseeme.org to determine whether the wMobile port is open. In a default installation, port 80 is used (HTTP). If you use HTTPS, then port 443 will most likely be used. Unless your ISP was notified that you use a particular port, it might have been left closed by default. The port needs to be open and mapped to your Web server where wMobile is installed.

It's also possible that a different port was designated for your wMobile in IIS. You can check your website binding in IIS.

If you are using a specific non-standard port, your URL will need to have the port added to it. Add a colon (:) and then the port number as shown in these examples:

http://ExternalIP:**8081**/wMobilePhone

http://ExternalIP:**8081**/wMobileDesktop

When you are in your office, you are typically connected to your internal network and using the external IP address might fail to get you connected. Using the internal IP address of the server on your network would be a better option.

See Also:
[Logging into wMobile](#)

7.11 ISAPI Filter Troubleshooting
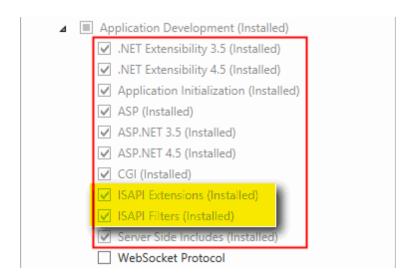
ISAPI filters are required for wMobile. If they are not installed, there will be an error during the install identifying that the ISAPI filters are missing.

"The installer has detected that none of the ISAPI filters are enabled for the selected web site. This will prevent correct functioning of the application….
Choose 'Yes' to ignore the error and continue with the installation, 'No' to stop installing wMobile Phone Edition 5.1 or 'Cancel' to go back and revise your settings."
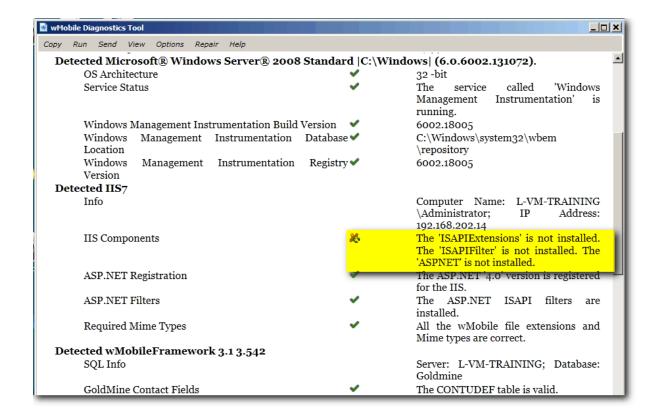
It is recommended to stop the installation and resolve this issue before continuing.

Check in **Roles and Features** to confirm that the **ISAPI Filters** and **ISAPI Extensions** are installed.
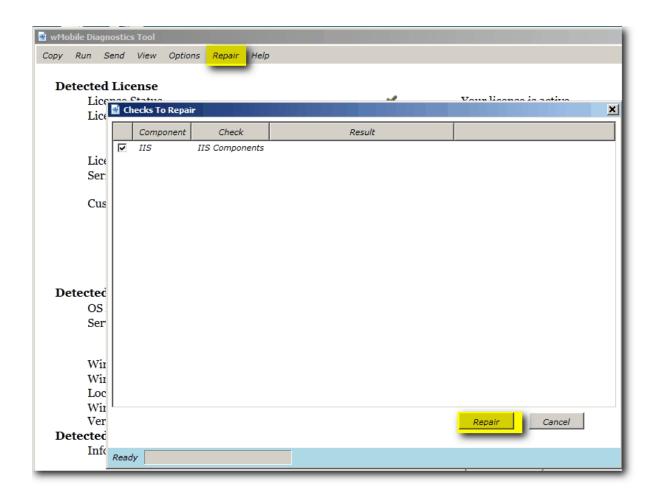
If the install was completed, but the ISAPI filters were not installed, this will be detected in the [wDiagnostics](#) tool:

Use the **Repair** option from the menu to install missing IIS components.

> 📃 **NOTE**: You might need to run the wDiagnostics tool using the '**Run As Administrator**' option to have permissions to install IIS components.

When completed, the **Result** status will be listed as **Fixed**, and the dialog can be closed.

7.12   Migrating wMobile to a New Server

INFORMATION:
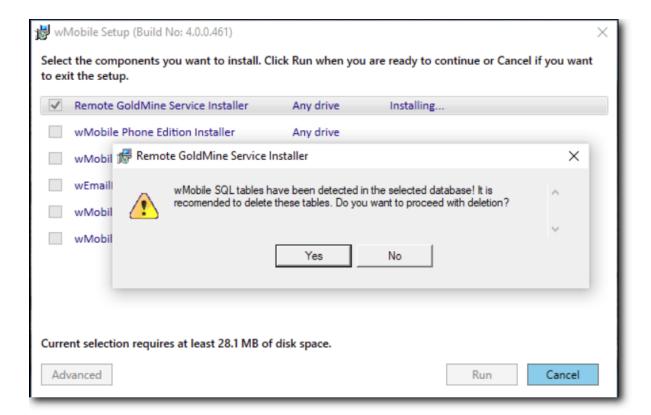
wMobile cannot be "moved" to a new server. The application must be reinstalled on the new server. The steps below are a guideline.

If wMobile is to be installed on a new server, please email goldminesupport@sugarcrm.com for a new license. Be sure to note what version of wMobile you are running.

If the wMobile version on the existing server is version 3.x, 4.x, or 5.x then wMobile can be installed on the new server over the existing wMobile (WT_ tables). If the wMobile version on the existing server is older than this, then the SQL table structure is different, and will cause conflicts. Where possible, we recommend updating wMobile on the original server before migration. If this is not possible, and wMobile is an older version (below 3.x), then uninstalling wMobile is recommended, or removing the WT_ SQL tables before installing wMobile on the new server.
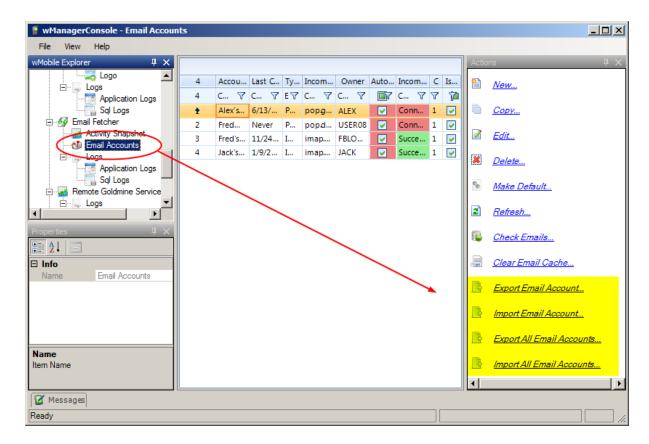
> ⚠ **IMPORTANT**: SQL Tables from an old install can cause problems with the new install.

Beginning with wMobile installer version 4.0.0.547, if WT_* tables are detected during installation, a warning message will be presented with the option to remove the old tables. Make the appropriate selection based on the information above.
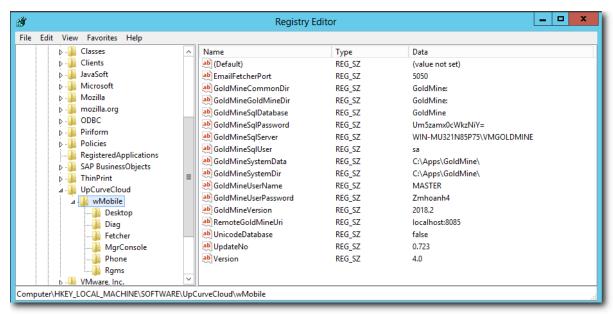
Some additional guidelines are below.

1. If wMobile is being used as an email client for sending/receiving or auto-filing email, it is recommended to export the email account settings on the existing/old server. This can be done individually for each account or for all email accounts at one time. Email accounts can be re-imported on the new server if SQL tables are removed from the previous installation. Further detail on importing email accounts appears below.
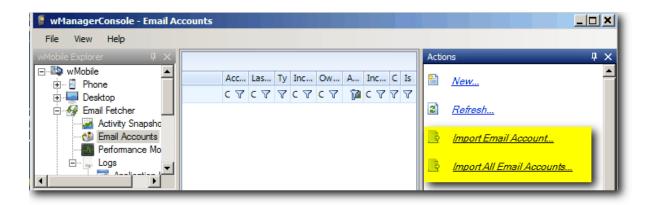
2. It is also recommended that a screenshot is saved of the wMobile registry key and its entries to be used for reference when reinstalling wMobile on the new server. This registry key is in the following location:

HKEY_LOCAL_MACHINE\SOFTWARE\W-Systems\wMobile

3. Be sure to make sure all prerequisite IIS roles and features are installed on the new server before installing wMobile.

4. Reinstall wMobile on the new server.

5. If SQL tables were removed, and Email Accounts don't appear in the Email Accounts list, import the previously exported Email Account data. Navigate to Email Accounts in the wMobile Explorer pane as shown below. Select **Import Email Account** or **Import All Email Accounts** in the **Actions** pane. Locate the email accounts export file from the original server, which will have a .eax file extension.

📄 **NOTE**: Migrating or reinstalling wMobile is not covered under standard maintenance. Migration and/or reinstallation can be scheduled with wMobile support staff at a flat fee of $350 USD.

Contact wMobile Support at goldminesupport@sugarcrm.com if you have further questions on this topic.

7.13   No connection could be made

OVERVIEW:

When a user attempts to log into wMobile, they receive a message stating that "No connection could be made because the target machine actively refused it".

PROBLEM:

One of the following errors, or one similar to these, can be displayed onscreen and/or appear in the wMobile logs:

Server Error in '/wMobilePhone' Application.

No connection could be made because the target machine actively refused it 127.0.0.1:8085

Description: An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code.

Exception Details: System.Net.Sockets.SocketException: No connection could be made because the target machine actively refused it 127.0.0.1:8085

Source Error:

An unhandled exception was generated during the execution of the current web request. Information regarding the origin and location of the exception can be identified using the exception stack trace below.

Stack Trace:

Server Error in '/wMobileDesktop' Application.

No connection could be made because the target machine actively refused it 127.0.0.1:8085

Description: An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code.

Exception Details: System.Net.Sockets.SocketException: No connection could be made because the target machine actively refused it 127.0.0.1:8085

Source Error:

An unhandled exception was generated during the execution of the current web request. Information regarding the origin and location of the exception can be identified using the exception stack trace below.

Stack Trace:

[SocketException (0x274d): No connection could be made because the target machine actively refuse
   System.Runtime.Remoting.Proxies.RealProxy.HandleReturnMessage(IMessage reqMsg, IMessage retMsg
   System.Runtime.Remoting.Proxies.RealProxy.PrivateInvoke(MessageData& msgData, Int32 type) +275

CAUSE:
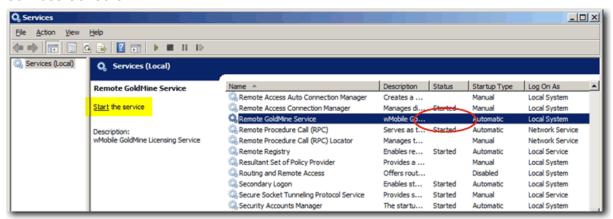
The connection is being refused because the **Remote GoldMine Service** is not running.

RESOLUTION:

1. On the server with the **Remote GoldMine Service** installed, click **Start > Run**.
2. Type **services.msc** and then click **OK**.
3. In the **Services** console, scroll down to the **Remote GoldMine Service** and select it.
4. Click **Start Service** button (or right-click on the **Remote GoldMine Service** entry in the list and click **Start** from the context menu).
5. After the service starts successfully, "Started" will appear in the **Status** column for the **Remote GoldMine Service**.
6. From the menu, select **File > Exit**.
7. Test your login to wMobile.

Services Console:

7.14 SQL Password Changed

PROBLEM:

If the SQL Server user/password credentials changed, the **Remote GoldMine Service** and other components that access SQL Server data will not work.
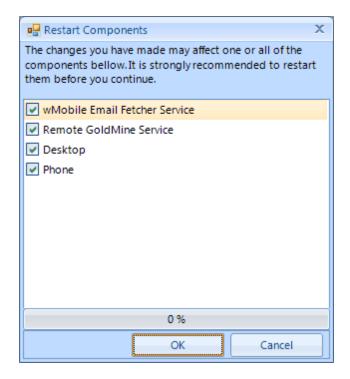
RESOLUTION:

To update wMobile's configuration to use the newer login credentials, start the **wMobile Manager Console** and you will be prompted to set them in the **Change SQL Password** dialog:

This will automatically update the SQL credentials in the registry.

After clicking **OK** the wMobile components will need to be restarted. Click **OK** to restart the application pools and services used by wMobile.

After the components are restarted, the **wMobile Manager Console Login** dialog will appear.
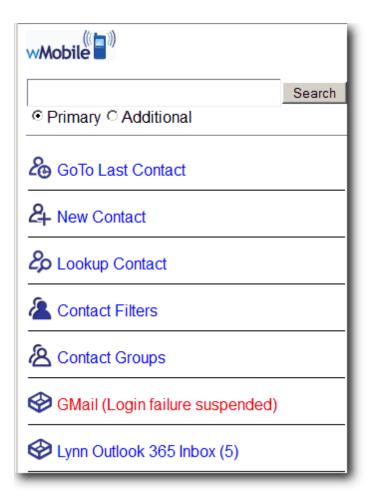
Note: The process above works when all wMobile components are on the server. If the Remote GoldMine Service resides on a different server, the wMobile Manager Console won't be able to access the registry on another server. In this case, email wMobile Support

at goldminesupport@sugarcrm.com for assistance. The registry contains the SQL password in an encrypted form, so it can't be edited in the registry directly.

7.15 Troubleshooting Email Accounts
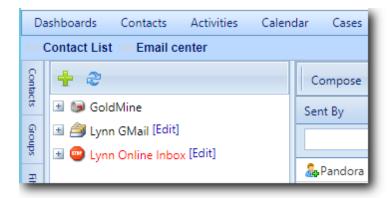
A user might report that they are not seeing new emails in wMobile. Or a user might see that their email account has been disabled, meaning that wMobile is no longer routinely checking for new email messages on the server or ISP mailbox.

In the Phone Edition, an account will be shown in red when there's a configuration problem or the account has been disabled due to connectivity issues.
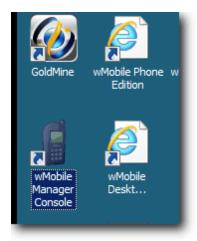
In Desktop Edition, the account will also be shown in red, and will have a Stop sign icon to indicate a problem.
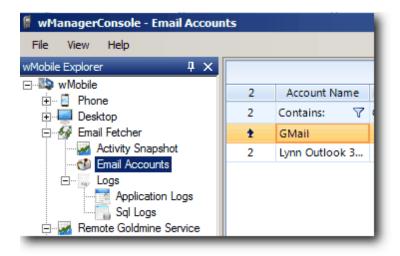
NOTE: When Auto-Retrieve is disabled, the stop sign is displayed and account name is shown in red as a visual reference. Hover your mouse over the account name to get more information.

Email settings can be accessed in either wMobile Phone or Desktop Edition, but the best place for an admin to troubleshoot these problems is in the wMobile Manager Console installed on the server.
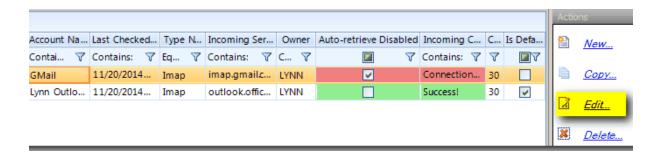
In the **wMobile Explorer** window, navigate to: **wMobile > Email Fetcher > Email Accounts**.

If auto-retrieve has been disabled, this status will be indicated in red.
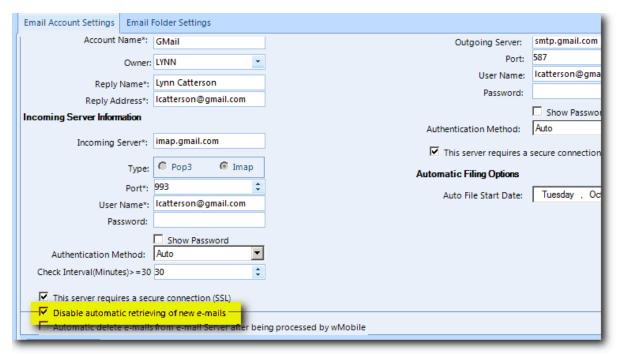
Highlight the account and select **Edit**.
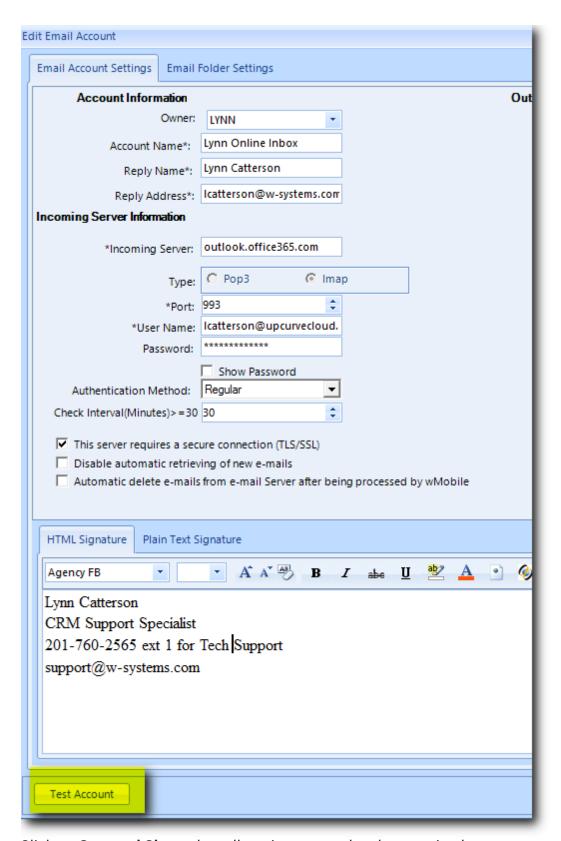
The email account settings will be displayed for review. If you know something has changed, such as the email password, go ahead and edit the settings.

When **Disable Auto Retrieving of new e-mails** is checked, the wMobile fetcher will no longer automatically check the server or ISP mailbox for new emails.

If the email fetcher fails to connect to an account a certain number of times, the auto-retrieval will be disabled automatically. By default, that's three times. This is done to prevent server resources from being used repeatedly to check a defunct account. The number of times that the account is checked and the interval can be adjusted in the Email Retrieval Settings.

If settings needed to be updated, use the Test Account button at the bottom of the email settings to see if the settings are valid.
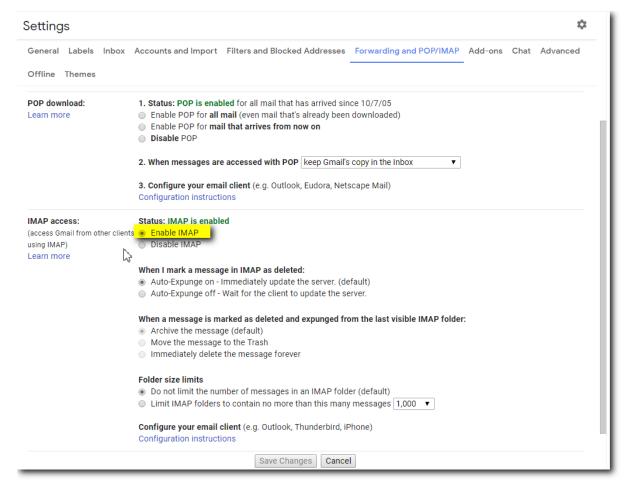
Click on **Save and Close** when all settings are updated appropriately.

7.15.1 Troubleshooting GMail Accounts

If a GMail Account doesn't test successfully, there are some settings to check in GMail.
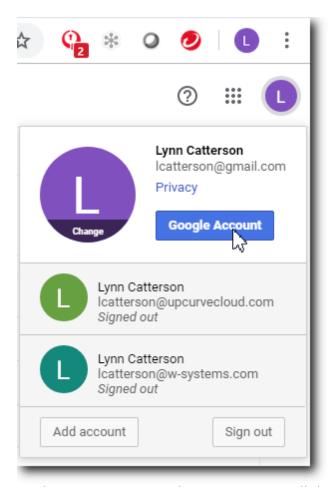
1) If the email account has been configured in wMobile to use the IMAP protocol, verify that IMAP has been enabled in GMail settings.
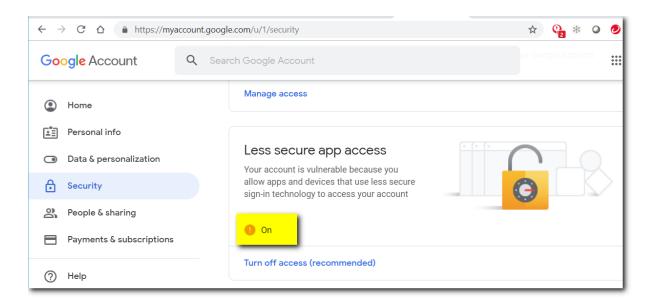
Further information on GMail settings can be found in Google Support:
https://support.google.com/mail/answer/7126229?hl=en

2) Verify that GMail's 'less secure app acess' setting is enabled. While wMobile does include functionality to connect using SSL (Secure Socket Layer) for email, GMail requires this setting with most email clients (including Outlook).

Log into your Google Account and select **Google Account**.

On the Account page, select Security. Scroll down to the Less secure app access setting and verify it's set to On or select **Turn on access**.

Note: It's possible that you will not be able to adjust this setting if your company has a corporate GMail account. This would need to be set by the GMail administrator.

Further information on GMail's less secure app setting can be found in Google Support: https://support.google.com/accounts/answer/6010255?hl=en

7.16　User Cannot Log into wMobile

PROBLEM:

A user cannot log into wMobile. The login failure may occur for several reasons.

CAUSES / RESOLUTIONS:

Wrong username or password
There is a mismatch between your GoldMine login credentials (username and password) and what you entered for logging into wMobile. Use your GoldMine username and password credentials exactly as you do for logging into GoldMine.

Access denied
You have entered valid username and password credentials but have not been granted access to wMobile. To grant access for a user, log into the wMobile Manager Console and open the **Users** list by double-clicking the **Users** icon in the main window. Place a check in the Allow Login column for the user needing access and then click on the **Save** button in the **Actions** window to save this change. If the user list is not complete, see the section on Adding or Updating Users in wMobile.

Multiple incorrect login attempts (Account is Locked)
If a user attempts to log in with the correct username but uses an incorrect password, after a predetermined number of failed attempts, the user will be locked out of wMobile. Please see Account is Locked for details and how to re-enable the user's access.

7.17　wSetup.exe installer blocked

OVERVIEW:

The wSetup.exe is clicked on, but nothing happens. There is no on-screen message, so it's not clear what's happening. We have seen the installer marked as blocked in some Windows environments.
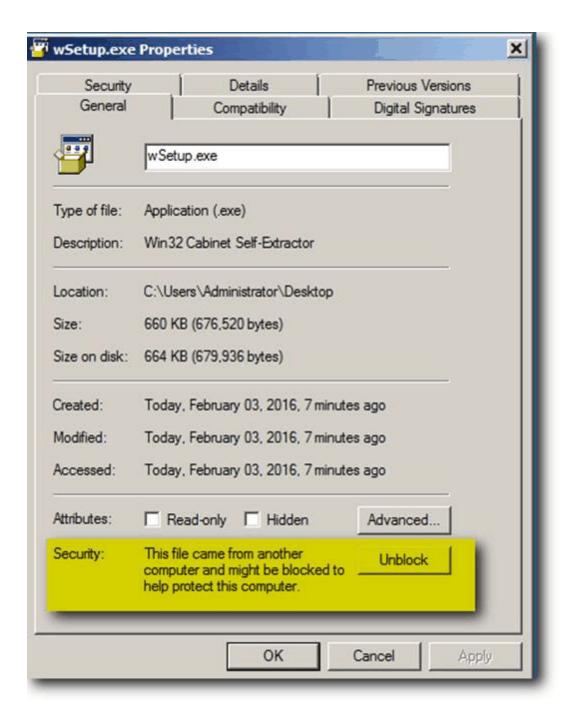
PROBLEM:

Under some Windows policy settings, installers are marked as blocked.
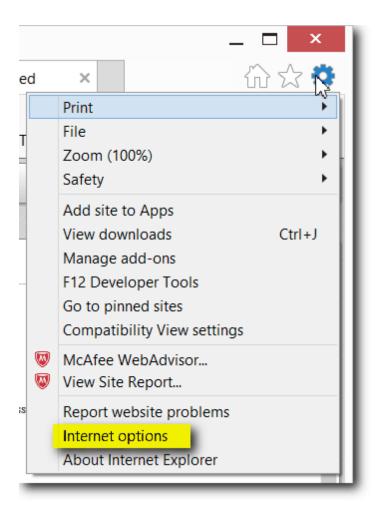
RESOLUTION:

There are 2 steps to take to resolve the blocked installer.
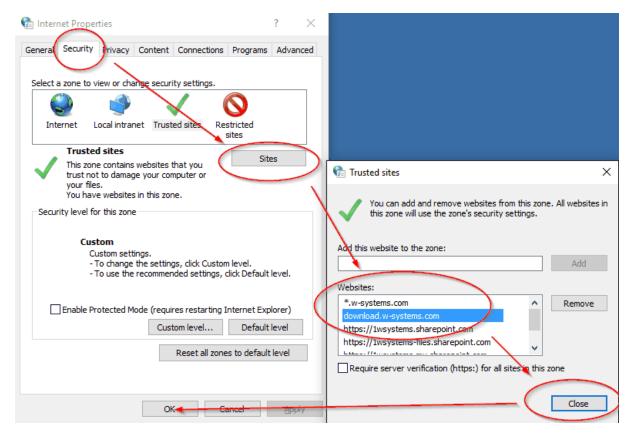
For a one-time, temporary fix, right click on the downloaded installer file (wSetup.exe) and select **Properties**. On the general tab, select **Unblock** as shown below.

To resolve this for future updates/upgrades as well, the wMobile download page should be added to Trusted sites. This can be accessed in Internet Explorer by going into **Internet Options**.

Select the **Security tab** and select **Sites**. Then add download.w-systems.com to the list of trusted sites.

You can also get to this area faster by typing in inetcpl.cpl from the Run option in Windows or a Command Line.

After this change is made, the installer will run as expected.

8   Technical Support

For Technical Assistance:

wMobile maintenance is $59/USD per user per year. Maintenance includes all application updates throughout the maintenance period. The maintenance also includes limited tech support. (Installation and migration are not included, but any functionality issues, questions, errors etc are included.)

If technical support is needed, please feel free to:

- Contact your wMobile partner
- Email goldminesupport@sugarcrm.com. Please include as much information as possible regarding your issue and supply full contact information so we know who to contact when we respond. Thank you!
- You may also initiate a support request by submitting a wDiagnostic.

9 Additional Information

9.1 Contact Information

W-Systems merged with SugarCRM in November 2020 after years as a top SugarCRM reseller. Sugar will continue to serve W-Systems customers using GoldMine by offering implementation and consulting services. wMobile for GoldMine will continue to operate as normal. The W-Systems services personnel will not change. Going forward, wMobile renewal notifications and invoices will come from Sugar.

wMobile questions can be directed to the wMobile team via email at goldminesupport@sugarcrm.com.

wMobile maintenance is $59/USD per user per year. Maintenance includes all application updates throughout the maintenance period. The maintenance also includes limited tech support. Installation and migration are not included, but any functionality issues, questions, errors etc are included. Support should be initiated via email to goldminesupport@sugarcrm.com. This will automatically create a support case. You may also initiate a support request by submitting a [wDiagnostic](#).

9.2 End-User License Agreement (EULA)

wMobile End User License Agreement
IMPORTANT – PLEASE READ CAREFULLY

Before reading the articles below, please note the following preliminary terms, which use some of the definitions specified in Article 1 below:

Entering into this Agreement: This End User License Agreement constitutes a valid and binding agreement between W-Systems and You, as a user, for the use of the wMobile Software. You must enter into this Agreement by clicking on the ACCEPT button in order to install and use the wMobile Software. You hereby agree and acknowledge that this

Agreement covers all Your use of wMobile Software, whether it be from this installation or from any other terminals where wMobile Software has been installed, by You or by third parties. Furthermore, by installing and continuing to use the wMobile Software You agree to be bound by the terms of this Agreement and any new versions hereof.

Electronic Signatures and Agreement(s): You acknowledge and agree that by clicking on the ACCEPT button or similar buttons or links as may be designated by wMobile to show Your approval of any foregoing texts and/or to download and install the wMobile Software, You are entering into a legally binding contract. You hereby agree to the use of electronic communication in order to enter into contracts, place orders and other records and to the electronic delivery of notices, policies and records of transactions initiated or completed through the wMobile Software. Furthermore, You hereby waive any rights or requirements under any laws or regulations in any jurisdiction which require an original (non-electronic) signature or delivery or retention of non-electronic records, to the extent permitted under applicable mandatory law.

Article 1 Definitions

In this Agreement the following capitalized definitions are being used, singular as well as plural.

1.1 **Affiliate**: any corporation, company or other entity that directly or indirectly controls, is controlled by, or is under common control with, wMobile. For the purpose of this definition, the word "control" shall mean the direct or indirect ownership of more than fifty percent (50%) of the outstanding voting stock of the corporation, company, or other entity.

1.2 **Agreement**: this End User License Agreement, as may be renewed, modified and/or amended from time to time.

1.3 **Documentation**: any online or otherwise enclosed documentation provided by wMobile.

1.4 **Effective Date**: the date on which this Agreement is entered into by clicking on the ACCEPT button as stated above.

1.5 **IP Rights**: any and all intellectual property rights, including but not limited to copyrights, trademarks and patents, as well as know how and trade secrets contained in or relating to the wMobile Software, the Documentation, the wMobile Website or the wMobile Promotional Materials.

1.6 **W-Systems**: refers to the company established under the laws of New Jersey, W-Systems, with its address at 19 Spear Road, Suite 101, Ramsey, NJ 07446.

1.7 **wMobile API**: application program interface consisting of the set of routines utilized by the wMobile Software to provide the wMobile Software functionality for a given platform or operating system, wMobile API being included in or linked to the wMobile Software.

1.8 **wMobile Online Material**: the wMobile images and documents available for download on the wMobile Website.

1.9 **wMobile Promotional Materials**: any and all trademarks, names, signs, logos, banners, wMobile Online Material and any other materials, in whatever form, owned and/or used by wMobile for the promotion of its company, its products and activities.

1.10 **wMobile Software**: the software distributed by SugarCRM for wireless CRM applications, including without limitation the wMobile API, UI and Documentation, as well as any future programming fixes, updates and upgrades thereof.

1.11 **W-Systems Staff**: the officers, directors, employees and agents of W-Systems or its Affiliates, or any other persons hired by W-Systems or its Affiliates.

1.12 **wMobile Website**: any and all elements, contents and the 'look and feel' of the website.

1.13 **UI**: the user interface of the wMobile Software.

1.14 **You**: you, the end user of the wMobile Software, also used in the form "Your" where applicable.

Article 2 License and Restrictions

2.1 **License**. Subject to the terms of this Agreement, WMobile hereby grants You a limited,, non-exclusive, non-sublicensable, non-assignable, license to download, install and use the wMobile Software on Your server, computer, phone or PDA for the sole purpose of enabling wireless access to a wMobile server and any other applications that may be explicitly provided by wMobile.

2.2 **No Granting of Rights to Third Parties**. You will not sell, assign, rent, lease, distribute, export, import, act as an intermediary or provider, or otherwise grant rights to third parties with regard to the wMobile Software or any part thereof.

2.3 **No Modifications**. You will not undertake, cause, permit or authorize the modification, creation of derivative works, translation, reverse engineering, decompiling, disassembling or hacking of the wMobile Software or any part thereof.

2.4 **Third Parties**. You acknowledge and agree that the wMobile Software may be incorporated into, and may incorporate itself, software and other technology owned and controlled by third parties. Any such third party software or technology that is incorporated in the wMobile Software falls under the scope of this Agreement. Any and all other third party software or technology that may be distributed together with the wMobile Software will be subject to you explicitly accepting a license agreement with that third party. You acknowledge and agree that you will not enter into a contractual relationship with W-Systems or its Affiliates regarding such third party software or technology and you will look solely to the applicable third party and not to W-Systems or its Affiliates to enforce any of your rights.

2.5 **New Versions of the wMobile Software**. W-Systems, in its sole discretion, reserves the right to add additional features or functions, or to provide programming fixes, updates and upgrades, to the wMobile Software. You acknowledge and agree that W-Systems has no obligation to make available to You any subsequent versions of the WMobile Software beyond a 30 day period after initial purchase. You also agree that you may have to enter into a renewed version of this Agreement, in the event you want to download, install or use a new version of the wMobile Software. W-Systems will not accept any liability in relation to the direct or indirect damages caused by the release and/or the absence of release of new versions of the wMobile Software..

2.6 **Paid Services**. This Agreement applies to downloading, installing and using the wMobile Software. The use of any paid services which may be offered by W-Systems or its Affiliates, may be subject to the additional Terms of Service.

Article 3 Confidentiality and Privacy

3.1 **W-Systems's Confidential Information**. You agree to take all reasonable steps at all times to protect and maintain any confidential information regarding wMobile, its Affiliates, the wMobile Staff, the wMobile Software and the IP Rights, strictly confidential.

Article 4 IP Rights and Translations

4.1 **Exclusive Ownership**. You acknowledge and agree that any and all IP Rights to or arising from the wMobile Software are and shall remain the exclusive property of W-Systems and/or its licensors. Nothing in this Agreement intends to transfer any such IP Rights to, or to vest any such IP Rights in, You. You are only entitled to the limited use of the IP Rights granted to You in this Agreement. You will not take any action to jeopardize, limit or interfere with the IP Rights. You acknowledge and agree that any unauthorized use of the IP Rights is a violation of this Agreement as well as a violation of intellectual property laws, including without limitation copyright laws and trademark laws. You acknowledge and understand that all title and IP Rights in and to any third party content that is not contained in the wMobile Software, but may be accessed through use of the wMobile Software, is the property of the respective content owners and may be protected by applicable copyright or other intellectual property laws and treaties.

4.2 **No Removal of Notices**. You agree that You will not remove, obscure, make illegible or alter any notices or indications of the IP Rights and/or wMobile's rights and ownership thereof, whether such notice or indications are affixed on, contained in or otherwise connected to such materials.

Article 5 Your Use of the wMobile Software

5.1 **No Warranties**. Access to a wMobile server is dependent on communications services provided to You by your communications vendor. W-Systems cannot guarantee that You will always be able to access your wMobile server, nor can W-Systems guarantee that You can communicate without disruptions, delays or communication-related flaws. W-Systems will not be liable for any such disruptions, delays or other omissions in any communication experienced when using wMobile Software.

Article 6 Term and (Consequences of) Termination

6.1 **Term**. This Agreement will be effective as of the Effective Date and will remain effective until terminated by either W-Systems or You as set forth below.

6.2 **Termination by W-Systems**. Without limiting other remedies, W-Systems may limit, suspend, or terminate this license and Your use of wMobile Software with immediate effect, if we think that You are in breach of this Agreement. W-Systems shall effect such termination by providing notice to You to the email address You have provided.

6.3 **Termination by You**. You may terminate this Agreement with immediate effect at any time, with or without cause and without recourse to the courts, provided that You will meet with the conditions as set forth in Article 6.4 below.

6.4 **Consequences of Termination**. Upon termination of this Agreement, You (a) acknowledge and agree that all licenses and rights to use the wMobile Software shall terminate, and (b) will cease any and all use of the wMobile Software, and (c) will remove the wMobile Software from all hard drives, networks and other storage media and destroy all copies of the wMobile Software in Your possession or under Your control.

6.5 **No liability**. W-Systems will not be liable in relation to any damage caused by the termination of this Agreement.

Article 7 Your Representations and Warranties; Indemnification of WMobile

7.1 **Representations**. You represent and warrant that You are authorized to enter into this Agreement and comply with its terms. Furthermore, You represent and warrant that You will at any and all times meet with Your obligations hereunder, as well as any and all laws, regulations and policies that may apply to the use of the wMobile Software.

7.2 **Indemnification**. You agree to indemnify, defend and hold W-Systems, Affiliates and the W-Systems Staff harmless from and against any and all liability and costs, including reasonable attorneys' fees incurred by said parties, in connection with or arising out of Your (a) violation or breach of any term of this Agreement or any applicable law or regulation, whether or not referenced herein, or (b) violation of any rights of any third party, or (c) use or misuse of the wMobile Software.

7.3 **Export Restrictions**. You acknowledge that the wMobile Software may be subject to international rules that govern the export of software. You agree to comply with all applicable international and national laws that apply to the wMobile Software as well as end-user, end-use and destination restrictions issued by national governments.

Article 8 Disclaimer of Warranties

8.1 **No warranties**. THE WMOBILE SOFTWARE IS PROVIDED "AS IS", WITH NO WARRANTIES WHATSOEVER; W-SYSTEMS CORP. DOES NOT, EITHER EXPRESSED, IMPLIED OR STATUTORY, MAKE ANY WARRANTIES, CLAIMS OR REPRESENTATIONS WITH RESPECT TO THE WMOBILE SOFTWARE, INCLUDING, WITHOUT LIMITATION, WARRANTIES OF QUALITY, PERFORMANCE, NON-INFRINGEMENT, MERCHANTABILITY, OR FITNESS FOR USE OR A PARTICULAR PURPOSE. W-SYSTEMS CORP. FURTHER DOES NOT REPRESENT OR WARRANT THAT THE WMOBILE SOFTWARE WILL ALWAYS BE AVAILABLE, ACCESSIBLE, UNINTERRUPTED, TIMELY, SECURE, ACCURATE, COMPLETE AND ERROR-FREE, NOR DOES W-SYSTEMS CORP. WARRANT ANY CONNECTION TO OR TRANSMISSION FROM THE INTERNET.

8.2 **Your own Risk**. You acknowledge and agree that the entire risk arising out of the use or performance of the wMobile Software remains with You, to the maximum extent permitted by law.

8.3 **Jurisdiction's Limitations**. As some jurisdictions do not allow some of the exclusions or limitations as set forth above, some of these exclusions or limitations may not apply to You. In such event the liability will be limited as far as legally possible under the applicable legislation.

Article 9 Limitation of Liability

9.1 **Limitation of Liability**. IN NO EVENT SHALL W-SYSTEMS CORP., ITS AFFILIATES OR THE W-SYSTEMS CORP. STAFF BE LIABLE, WHETHER IN CONTRACT, WARRANTY, TORT (INCLUDING NEGLIGENCE), PRODUCT LIABILITY OR ANY OTHER FORM OF LIABILITY, FOR ANY INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES (INCLUDING WITHOUT LIMITATION ANY LOSS OF DATA, INTERRUPTION, COMPUTER FAILURE OR PECUNIARY LOSS) ARISING OUT OF THE USE OR INABILITY TO USE THE WMOBILE SOFTWARE, EVEN IF W-SYSTEMS CORP., ITS AFFILIATES OR THE W-SYSTEMS CORP. STAFF HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

9.2 **Remedy**. YOUR ONLY RIGHT OR REMEDY WITH RESPECT TO ANY PROBLEMS OR DISSATISFACTION WITH THE WMOBILE SOFTWARE IS TO DEINSTALL AND CEASE USE OF SUCH WMOBILE SOFTWARE.

9.3 **Jurisdiction's Limitations**. As some jurisdictions do not allow some of the exclusions or limitations as set forth above, some of these exclusions or limitations may not apply to You. In such event the liability will be limited as far as legally possible under the applicable legislation.

Article 10 General Provisions

10.1 **New versions of the Agreement**. W-Systems reserves the right to modify this Agreement at any time by providing such revised Agreement to You or by publishing the revised Agreement on the W-Systems Website. The revised Agreement shall become effective within thirty (30) days of such publishing or provision to You, unless You expressly accept the revised Agreement earlier by clicking on the accept button. The express acceptance by You, or Your continued use of the wMobile Software after expiry of the notice period of thirty (30) days, shall constitute Your acceptance to be bound by the terms and conditions of the revised Agreement. W-Systems reserves the right to make changes to this Agreement from time to time.

10.2 **Entire Agreement**. The terms and conditions of this Agreement constitute the entire agreement between You and W-Systems with respect to the subject matter hereof and will supersede and replace all prior understandings and agreements, in whatever form, regarding the subject matter.

10.3 **Partial Invalidity**. Should any term or provision hereof be deemed invalid, void or enforceable either in its entirety or in a particular application, the remainder of this Agreement shall nonetheless remain in full force and effect.

10.4 **No waiver**. The failure of W-Systems at any time or times to require performance of any provisions hereof shall in no manner affect its right at a later time to enforce the same unless the same is explicitly waived in writing and signed by W-Systems.

10.5 **No Assignment by You**. You are not allowed to assign this Agreement or any rights hereunder.

10.6 **Assignment by W-Systems**. wMobile is allowed to at its sole discretion assign this Agreement or any rights hereunder to any Affiliate, without giving prior notice.

10.7 **Applicable Law**. This Agreement shall be governed by and construed in accordance with the laws of New Jersey.

10.8 **Competent Court**. Any legal proceedings arising out of or relating to this Agreement will be subject to the jurisdiction of the courts of the state of New Jersey.

YOU EXPRESSLY ACKNOWLEDGE THAT YOU HAVE READ THIS AGREEMENT AND UNDERSTAND THE RIGHTS, OBLIGATIONS, TERMS AND CONDITIONS SET FORTH HEREIN. BY CLICKING ON THE ACCEPT BUTTON AND/OR CONTINUING TO INSTALL THE WMOBILE SOFTWARE, YOU EXPRESSLY CONSENT TO BE BOUND BY ITS TERMS AND CONDITIONS AND GRANT TO WMOBILE THE RIGHTS SET FORTH HEREIN.

Last revised: December 2017.

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