GoldMine Link for Microsoft Outlook

GoldMine Link for Microsoft Outlook is a quick and easy way for you to link email messages from Microsoft Outlook to GoldMine. After installing GoldMine Link for Microsoft Outlook, a GoldMine toolbar is available within Outlook. This toolbar enables you to:

- Configure your GoldMine Link settings.
- Manually Link Email Messages to GoldMine contacts.
- Automatically link email messages to GoldMine contacts
    - Specify folders for automatic linking.
    - Specify email address to exclude from automatic linking.
- View a contact linked to an email message within GoldMine Premium Edition.
- Unlink email messages from GoldMine contacts.
- Create a new contact in GoldMine.
- Select recipients from the GoldMine Address Book to send email messages to.

IMPORTANT: GoldMine Link must be configured before the integration is considered complete and ready to use.

IMPORTANT: The GoldMine Address Book should be added *only* after the entire set up of GoldMine Link has been completed, and only after testing the connection between Outlook and GoldMine at least once.

Overview of GoldMine Link for Microsoft Outlook

After GoldMine Link has been installed, configured and is ready to use, you will see a GoldMine menu option in the toolbar. The toolbar contains several action buttons that allow you to:

- Link email messages to GoldMine contacts. See Linking Email Messages to GoldMine Contacts.
- Unlink email messages from GoldMine contacts. See Linking Email Messages to GoldMine Contacts
- View a contact linked to an email message within GoldMine Premium Edition.
- Configure your GoldMine Link settings.
- Connect to or disconnect from GoldMine.
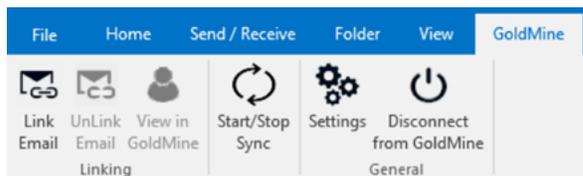
After installing GoldMine Link for Microsoft Outlook, you should see the following two (2) new columns appear in your default Inbox folder:

- **GM** column:
  Indicates whether or not an email message has been linked to a GoldMine contact.

- **GM Company** column:

  Displays the company and name of the GoldMine contact when an email message has been linked.

Linking Email Messages to GoldMine Contacts

You can link email messages from any of your **Microsoft Outlook** folders to GoldMine contacts either manually or by enabling automatic linking of email messages.

NOTE: In GoldMine, any linked email messages will be filed in the GoldMine contact's **History**, and will appear within the **History tab**.

Manually Link Email Messages

Email messages may be linked manually from Outlook to GoldMine contacts by using one of the following methods:

- Select an email message in Outlook then select the **Link Email** button in the GoldMine toolbar.
- Select several email messages in Outlook and click **Link Email** in the GoldMine toolbar.

At the **Link Email** dialog seen below, select an option to link your email message(s) to GoldMine.
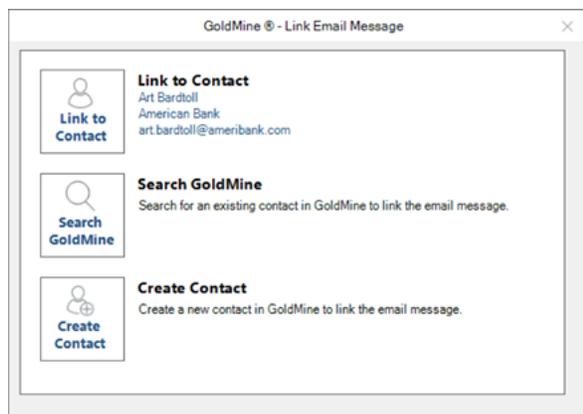
When multiple email messages are selected the following dialog is displayed.
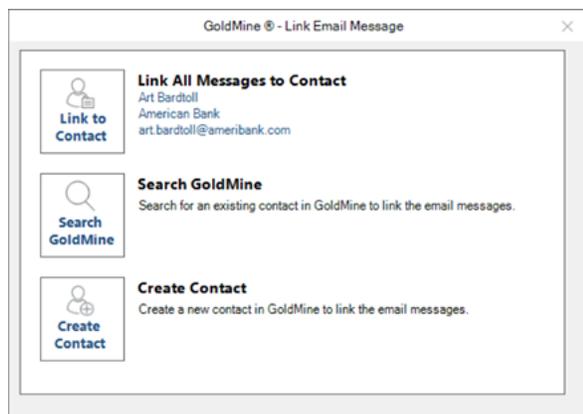
## Link to Contact / Link All Messages to Contact

If the email address in the selected email message(s) is (are) found in GoldMine, this section will contain information about the GoldMine contact whose email address matches the one in the selected email message(s).

- Selecting this option will link your selected email message to the GoldMine contact.
- To link a previously linked email message to a different contact, first unlink the email message from the original contact, then link the email message to the GoldMine contact of your choice.

If the email address is not found in GoldMine, the **Link to Contact** option is disabled, as seen in the following dialog.
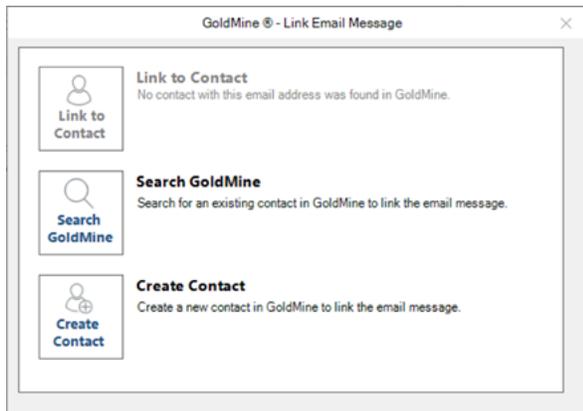
When multiple email messages are selected and the email address is NOT found in GoldMine, as seen in the following dialog.
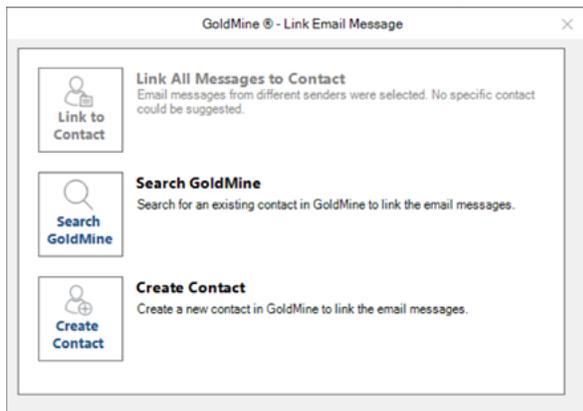
Search GoldMine

The **Search GoldMine** option enables you to search GoldMine Premium Edition for a specific contact, with whom to link the Outlook messages.
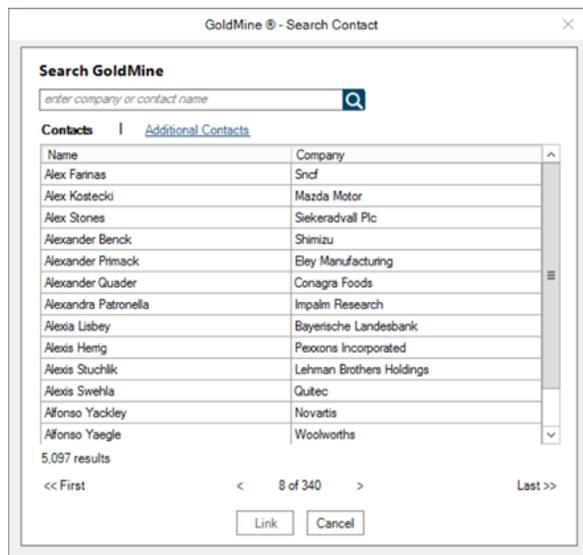
Browse your GoldMine contacts and additional contacts using the Search window, or enter a contact name or company in the search field to narrow your search results.

Once you have selected a GoldMine contact and selected the **Link** button, you will be prompted on what to do next, depending on whether or not the email address in the selected email message already exists in GoldMine.

1. If the email address *does not* exist in GoldMine, you will see the following options:
   a. To *add* the email address to the contact you choose, and link the email message.

      OR

   b. To *only* link the email messages to the contact you chose. The email address will not be added to the contact.

Selecting either one of these options will link the email messages to the GoldMine contact. See the following example.
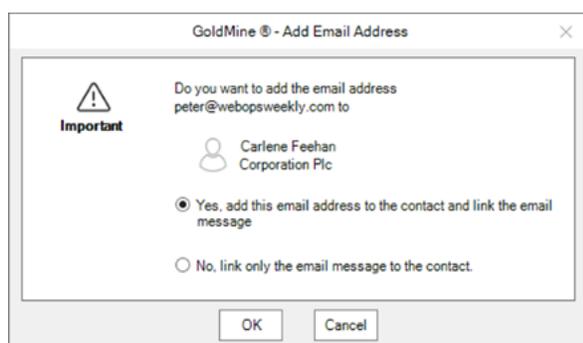
2. If the email address already exists in GoldMine, you will see the following options instead:

    a. To remove the email address from the contact it is currently attached to and add it the contact you have chosen from the Search window. Then link the email message.

     OR

    b. To only link the email messages to the contact you have chosen from the Search window. The email address will not be added to the contact.

Selecting either one of these options will link the selected email message/s to the GoldMine contact. See the following example.
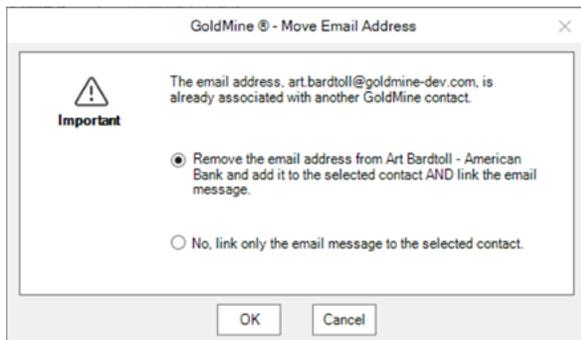
Create Contact

The **Create Contact** option, shown in the following example, enables you to create a new contact in GoldMine and link your selected email message(s) to the new GoldMine contact.
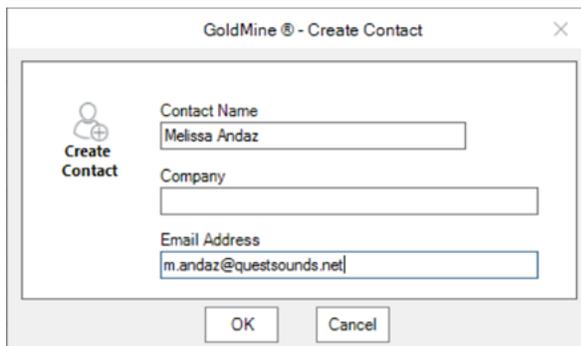
Enter the contact name and company and verify the email address of the GoldMine contact you want to create within the **Create Contact** window.

Select **OK** and GoldMine will attempt to create the new GoldMine contact and link the email message(s) to it after the contact is created.

- If BOTH the contact and company name matches an existing GoldMine contact, you will be prompted to select whether or not you wish to create a duplicate GoldMine contact with the same contact name and company as seen in the following example.

  - Select **Yes** and **OK** to create a duplicate GoldMine contact.
  - Select **No** and **OK** to return to the **Create Contact** window. You can then change any values, as needed.

- If the email address matches the email address of an existing GoldMine contact, you will see the following options:

  a. To *remove* the email address from the contact to which it belongs and *add it* to the contact you create. Then link the email message.

  OR

  b. To *only* link the selected email messages to the contact you create. The email address *will not* be added to this contact.

Selecting either option will link the email message to the newly created GoldMine contact.
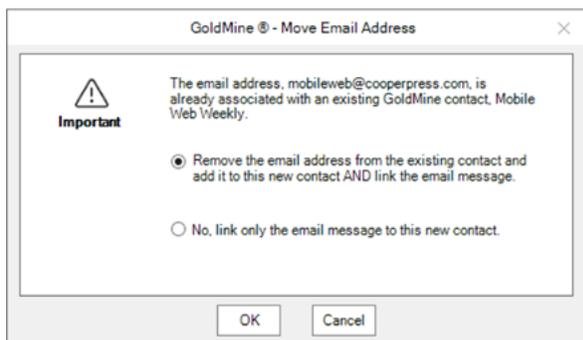
- If the contact and company name matches an existing GoldMine contact *and* the email address matches an existing GoldMine contact's email address.

  You are prompted to select whether you wish to create a duplicate GoldMine contact with the same contact name and company.

  You will see the following two (2) options:

  a. To continue with creating a duplicate GoldMine contact without the email address, and link the email message.

  OR

b. To remove the email address from the contact it is currently attached to and add it the new duplicate GoldMine contact. Then link the email message.

Selecting either one of these options will in future always link the email message to the newly created GoldMine contact. See the following example.
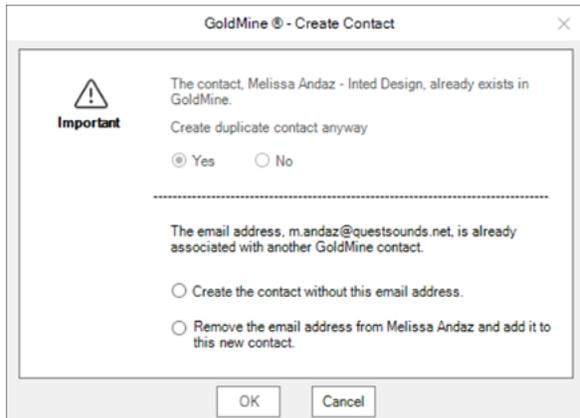
Automatically Link Email Messages

Enable automatic linking in GoldMine Link to automatically track Outlook folders for new email messages to link to GoldMine contacts.

For more information about enabling automatic linking and specifying Outlook folders for tracking, please refer to Setting Up Automatic Linking in GoldMine Link.

Automatic linking works by matching email addresses in the email messages to existing GoldMine contacts.

- If an email address matches a GoldMine contact's email address, the email message will be linked to that contact.
- If the email address does not match any GoldMine contact's email address, the email message will not be linked.
- If an email address matches the email addresses of multiple GoldMine contacts, automatic linking will skip the email message. It will not be linked to any contact.

Linked email messages will appear within the **History** tab for the GoldMine contact.

Unlinking Email Messages to GoldMine Contacts

This topics contains information about unlinking Outlook messages from GoldMine contacts.

Unlinking Email Messages Previously Linked to GoldMine Contacts

1. Select the email message(s) you want to unlink.
2. Select **Unlink Email** in the GoldMine Link toolbar.
3. The selected email message(s) will be unlinked.

Email messages that are not already linked to a GoldMine contact *cannot* be unlinked. If you have selected multiple email messages to unlink, GoldMine Link will skip any email messages that were not linked to a GoldMine contact.

To re-link a previously linked email message to a different GoldMine contact:

1. Select the email message you want to re-link.

2. Select **Unlink Email** in the GoldMine Link toolbar to unlink the message.

3. Select **Link Email** in the GoldMine Link toolbar.

4. Link the email message to a contact. See Linking Email Messages to GoldMine Contacts.

View a Contact Linked to an Email Message in GoldMine

For email messages that are linked to a GoldMine contact, you can view the contact in GoldMine by selecting **View in GoldMine** button in the GoldMine Link toolbar. This opens the contact within GoldMine Premium Edition.

Configure Your GoldMine Link Settings

GoldMine Link must be configured before the installation is considered complete and ready for use.

NOTE: If you are configuring GoldMine Link for the very first time, first log into GoldMine Premium Edition before proceeding to set up GoldMine Link.

General Set Up

After installing GoldMine Link, select **Settings** from the GoldMine tab in the Outlook toolbar to open the **Settings** window.
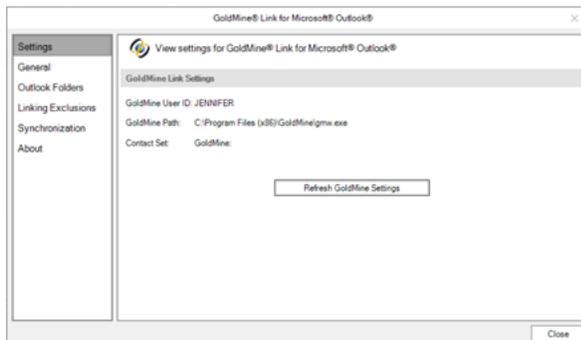
If values for **GoldMine User ID**, **GoldMine Path** and **Contact Set** are empty, select **Start GoldMine & Read GoldMine Settings** to retrieve your user settings from GoldMine Premium Edition.

If the values for **GoldMine User ID**, **GoldMine Path** and **Contact Set** are incorrect:

- If you are logged into GoldMine Premium Edition, select the **Refresh GoldMine Settings** button to update your user settings.

- If you are not already logged in, log into GoldMine Premium Edition then select **Refresh GoldMine Settings** button from the Outlook toolbar to update your user settings.

Setting Up Automatic Linking in GoldMine Link

To enable automatic linking, select **General** from the left pane of the **Settings** window. Automatic linking can be enabled for: emails received, emails sent, or for both.
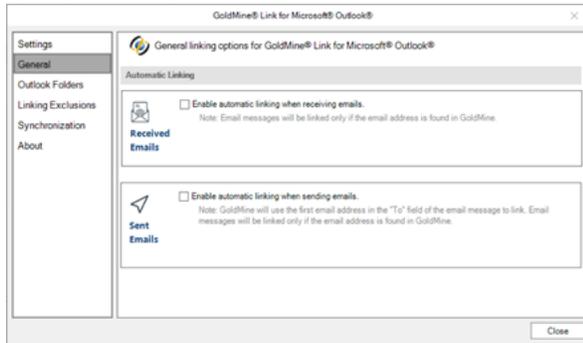
- To enable automatic linking for received emails, select the **Enable automatic linking when receiving emails** checkbox.
  - When enabled for received emails, email messages in the default Inbox associated with the default Data File specified in your Outlook settings will be linked.
- To enable automatic linking for sent emails, select the **Enable automatic linking when sending emails** checkbox.
 - When enabled for sent emails, email messages in the default Sent folder associated with the default Data File specified in your Outlook settings will be linked automatically.

Email messages that were received and/or sent prior to enabling automatic linking will not be linked automatically. To link these email messages, you will need to manually link them. See Linking Email Messages to GoldMine Contacts for more information.

NOTE: *After* automatic linking has been enabled, if email messages in your default Inbox and/or Sent folders do not appear to be automatically linked even though the email addresses of the messages in those folders exists in GoldMine, verify your **Outlook Account Settings** to ensure that the correct data file has been set as a default.

Outlook Folders for Automatic Linking

In addition to the default Inbox and/or Sent folders, you can set automatic linking to track other Outlook folders.

To specify additional Outlook folders for automatic linking, select **Outlook Folders** in the left pane of the Settings window:

- The folders specified in the **Folders for automatic tracking** column will be the additional folders that GoldMine Link will track for automatic linking.

- To add additional folders for automatic linking to track, select the folder(s) desired from the **Your Outlook folders** column and the **>>** button to add them in the **Outlook Folders** column. Any folders not explicitly specified are not tracked for automatic linking.

- When automatic linking has been enabled, the email messages in your default Inbox and/or default Sent folders associated with the Data File specified in your Outlook settings are tracked. You do not have to add them to the **Folders for automatic linking** column.

- To remove any folders, select the folder(s) from the **Folders for automatic linking** column and the **<<** button to remove them. Automatic linking will no longer track those folders.

Email Addresses to Exclude in Automatic Linking

To exclude specific email addresses to be automatically linked, you may specify them so that automatic linking will skip the messages sent to these email addresses.

1. In the field with the placeholder enter **email address or domain**, enter the email address or domain you wish automatic linking to *exclude*, and select the **Add** button to save the email address or domain.
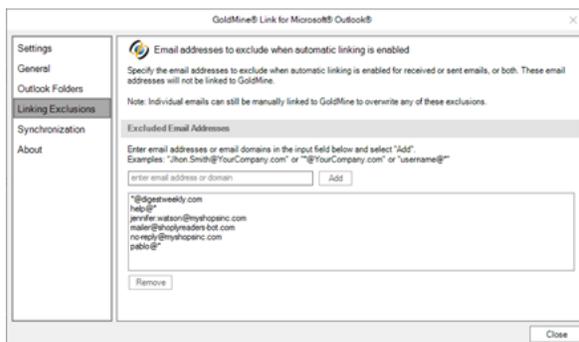
2. You can enter exact email addresses, for example `john.doe@yourcompany.com`, or use the asterisk * as a wildcard for example `*@yourcompany.com` or `jane@*`).

    To remove any previously excluded email addresses or domains, select an item from the list in the box under the **enter email address or domain** field, then select the **Remove** button to remove it.

3. Select the **Add** button to add the next email address or domain to the exclusion list.

Synchronization

If your GoldMine user account has been enabled for synchronization between Microsoft Outlook and GoldMine Premium Edition, you may set up or update your Outlook synchronization profile. Selecting the **Set up Outlook Synchronization for <user>** button will launch the Outlook synchronization wizard within GoldMine Premium Edition.