

GoldMine®

VERSION 6.7

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Glossary

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INTRODUCTION



Introduction

Welcome to GoldMine

Welcome to GoldMine! GoldMine is the award-winning contact manager for individuals and teams, specifically designed for small- and mid-sized organizations to bridge the gap between traditional contact managers and complex Customer Relationship Management (CRM) solutions.

GoldMine provides your organization with a powerful, comprehensive, integrated, automated solution to managing customer relationships. The GoldMine solution offers effective tools to develop contacts, conduct activities, and track progress – tools that are available for both the individual and the workgroup. And with GoldMine's synchronization features, users working remotely can stay current with the main company database.

About this Guide

This guide introduces you to the main features in GoldMine Standard and GoldMine Corporate Edition and provides you with answers to your basic questions about how GoldMine works. For detailed instructions, consult the online Help and for an explanation of the administrative functions, review the *Administrator Guide*.

Some of the features discussed are specific to a particular edition. The term “GoldMine” is used when the feature applies to both GoldMine Standard or GoldMine Corporate Edition. The differences are commonly defined as follows:

- GoldMine Standard is licensed with a standard D-license and uses a dBASE database.
- GoldMine Corporate Edition is licensed with an E-license (enterprise) and typically uses an SQL database on Microsoft SQL Server.



Note: GoldMine Standard was previously known as GoldMine Business Contact Manager. GoldMine Corporate Edition was previously known as GoldMine Sales & Marketing.

IMPORTANT: For detailed, step-by-step instructions on any of the procedures mentioned in this guide, please refer to the online Help system by selecting **Help>>Help Topics**.

Audience and Expertise

The material assumes you have installed IP Contact Center and configured the IP Contact Center server. It also assumes you have an understanding of database structure and terminology and of the Microsoft Windows operating system.

Document Conventions

Example	Description
File>>Print	Menu bar commands (in this example, select File on the menu bar, then select Print in the drop-down menu)
The Select a Data Source dialog box appears.	Dialog boxes and menu items in bold
OK 	Button names
Note	Additional information
CAUTION/WARNING	Critical information to prevent functionality or data loss
	Reference to another topic or resource

Resources

- **GoldMine Help** (access from the Help menu)
- **What's New in GoldMine**
- **GoldMine Installation Guide**
- **Users Guide**
- **Administrator Guide**
- **Manager's Console/Answer Wizard**

IMPORTANT: Manuals are available in PDF format from the Installation CD-ROM or NetUpdate download or from **support.frontrange.com** for maintenance customers.

Contact Us

Support Site

FrontRange Solutions can answer your technical support questions about HEAT, GoldMine, and IT Service Management. Visit:

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Offices are also located in Los Angeles, United Kingdom, Germany, Italy, South Africa, Australia, Singapore, and China.

in this chapter...

- What is GoldMine?
- Maintaining Contact Information
- Managing Activities
- Managing Sales
- Communicating with Others
- Analyzing and Reporting
- Synchronizing Data
- Automating Routine Tasks

CHAPTER ONE

1

GoldMine Overview

Introduction

GoldMine puts all necessary contact information at your fingertips. Most organizations, particularly those geared toward sales, need to track not only the contacts, but their histories and pending activities as well. Customer service, sales, management, and accounting teams must all be able to communicate internally about prospects, clients, and vendors. GoldMine integrates each team's contribution into efficient, team-based workgroups by relating all communications and activities back to the contact.

For the GoldMine administrator who manages the system configurations, the application provides the capability to create users, customize contact records, set security, configure Automated Processes, manage databases, maintain databases, and administrate GoldSync. See the *Administrator Guide* for an overview of the administrative options.

What is GoldMine?



GoldMine is a set of customizable tools revolving around the Contact Record, enabling your organization's personnel to interact effectively and efficiently with contacts. It allows them to schedule, automate, and track activities associated with each contact. Whether you work alone or with others, GoldMine's flexibility and synchronization features keep you current with all your contacts, whether they are customers, prospects, or vendors. During a typical work day, you can use GoldMine to:

- Quickly look up information about your contacts. GoldMine associates all activity, sales, and correspondence with each contact, so you can retrieve all relevant information for an individual from one place.
- Schedule, track, and complete your activities, from 15-minute telephone calls to week-long events.
- Plan and record an individual sale or large-scale sales opportunities that require a team to complete. Managers can use GoldMine to assign quotas and track actual performance during a quota period.
- Send and retrieve e-mail from your Internet e-mail accounts. You can also set up your own system to organize e-mail in categories that work best for you.

- Print and fax letters, memos, and other types of correspondence. You can use GoldMine's filters and groups to target your mailings to the appropriate recipients, and work with customized templates to personalize correspondence.
- Manage the fulfillment of requests for printed literature, such as brochures and catalogs, to prospects and customers.
- Run reports, using one of GoldMine's standard reports, a Crystal Decisions Crystal Reports (if installed), or a custom report developed with GoldMine's report designer.
- Update your contact and calendar information by synchronizing GoldMine with your office, or with other popular products, such as Microsoft Outlook, Palm, Visor, and Pocket PC.

Several programs can do all this – but in one application GoldMine allows you to manage work to a degree not possible when using several separate programs.

The following sections show how you can work smarter using GoldMine's key features every day to increase your efficiency.

Maintaining Contact Information

You can use GoldMine to store a vast amount of information about each prospect and customer, yet find a specific type of information quickly.

GoldMine's method of categorizing information in tab folders puts this information at your fingertips.

Each time you or any user in your organization uses GoldMine to add a contact to GoldMine's database, a **Contact Record** is created. The Contact Record is the basic building block from which all other information is generated.

Each Contact Record is like an individual index card and has all the standard information, such as name, company, phone, and address. However, the amount of detail you can store and track on each record is virtually unlimited as you customize GoldMine for your organization by creating new fields for your Contact Records.

Managing Activities

Schedule, view, and complete activities in GoldMine for yourself and your team members. Activities you schedule for a future date and time are stored as records in GoldMine's Calendar. Reminders and alerts keep you up to date. Once calls are made, appointments kept, and messages received, the information transfers from the Calendar and the related contact's Pending tab to the History tab, where it is stored as a completed activity record.

Do you want to check your schedule for activities on a particular day, week, or even a month? If you work with others on accounts, do you want to review all activities scheduled for one contact by all team members? You can view activities for users, user groups, for a particular date, or for a contact.

You can use the Calendar to view activities by date, the Activity List to view by activity type, and the Pending tab on the Contact Record to view the contact's activities for the contact.

Each activity record, whether still pending on the Calendar or completed in the history file, is directly linked to a specific Contact Record. Connecting activities to contacts establishes a relational link that you can use to track the progress of each customer relationship.

Managing Sales

Sales is the key activity for many organizations. GoldMine provides special features for planning, scheduling, and recording sales. Individuals can forecast sales that they are responsible to close. Managers can use GoldMine to assign and track sales quotas.

GoldMine also provides a comprehensive set of features in the Opportunity Manager that a sales team can use to manage a complex sale composed of multiple components and participants.

Communicating with Others

You can use GoldMine to communicate by today's most frequently used methods—print and fax correspondence, send e-mail, send pages, and distribute literature. GoldMine integrates the functionality of your word processor and e-mail software to communicate with contacts and coworkers.

E-mail

You can use GoldMine to send, retrieve, and manage your Internet e-mail. Individuals within an organization can use GoldMine e-mail, which provides the same extensive feature as Internet e-mail, yet does not require an online connection.

Printing and Faxing Correspondence

GoldMine works in conjunction with Microsoft Word so you can merge contact information from GoldMine into templates, generating personalized correspondence. GoldMine's Document Management Center provides a central location where you can access and manage your correspondence.

Distributing Literature

Organizations can manage requests for printed material, such as brochures and price lists, using GoldMine's Literature Fulfillment Center.

Paging

Using GoldMine, you can send a pager message by dialing or by sending e-mail.

Analyzing and Reporting

GoldMine provides analysis reports you can run to review metrics. For example, GoldMine can calculate statistics based on activities scheduled and completed by any or all GoldMine users.

Select from over 50 standard GoldMine reports or design a custom report tailored specifically to meet the needs of your organization. If you are using GoldMine Corporate Edition with an E-license, you can use the Answer Wizard reports.

Synchronizing Data

Using GoldMine's synchronization features can ensure that your contact data stays consistent and up-to-date across applications and devices (such as your Palm, Visor, or Pocket PC). GoldMine also synchronizes data between the main office and off-site, undocked users.

Automating Routine Tasks

Streamline your work with Automated Processes and the Server Agents Administrator, making GoldMine a reliable assistant and freeing you from many routine, time-consuming tasks.

Automated Processes

Using Automated Processes, you can set up GoldMine to perform repetitive tasks required in medium- and long-length sales cycles, including:

- Administrative and tracking duties
- Generating direct mail
- Validating data

Set up a series of predefined actions to run on all contacts or groups of contacts in the database. For example, using an Automated Process you can print an introductory letter to a new contact whenever a Contact Record is created. After printing the letter, the Automated Process can automatically schedule a follow-up activity (such as a call back) on the calendar of a specified GoldMine user.

Server Agents Administrator

The Server Agents Administrator helps you to manage the activities you need to occur on a regular basis, such as:

- Retrieving Internet e-mail with GoldMine
- Printing and faxing correspondence
- Running Automated Processes

Tip:

Find out more about GoldMine's automation tools in the Administrator Guide. Learn to use these tools using the online Help.

in this chapter...

- Key Terms
- Launching GoldMine
- Using the QuickStart Wizard
- Navigating the Main Window
- Using My GoldMine
- Quitting your Work Session

CHAPTER TWO

How GoldMine Works

Overview

GoldMine places a full range of features in an easy-to-navigate main window. After you log on, GoldMine's work area appears. Within the work area you can perform virtually all of the tasks related to the management of your contact relationships, either individually or as part of a team.

Record information about prospects and customers, schedule and complete activities, send correspondence and literature, manage e-mail, and more. Tie almost every task to a Contact Record so synchronizing, tracking, and reporting features provide up-to-date information. This chapter explains key terms, describes how to start and stop the application, and shows you how to navigate the interface.

Tip:

The Glossary provides an extensive list of terms in GoldMine's displays and to describe operations.

Key Terms

The following terms identify the various portions of GoldMine's main window.

Work Area

The work area displays open Contact Records, the Calendar, Activity List, E-mail Center, and any other open windows. Although you can open, position, and size multiple contact records in the work area, only one Contact Record can be active at a time.

Contact Record

The standard unit of information in GoldMine is the Contact Record. It incorporates standard contact information, such as name, company, phone number, and address, and much more. Most operations in GoldMine are performed on the Contact Record.

The Contact Record serves as the basis for all scheduled work in GoldMine, acting as the central link between GoldMine's Calendar and History by maintaining all pending and past events related to each individual Contact Record in the GoldMine database.

When multiple windows are open in your GoldMine work area, the title bar of an active Contact Record is a different color from other records or items occupying the work area.

F2 Lookup

A special type of data entry tool that can be set up to list frequently used or code-specific entries. Security options control F2 Lookups, ensuring user input and allowing standardization of data.

Calendar

A graphic display of scheduled activities, the Calendar organizes activity information in a set of tabs that access different levels and types of detail.

You can use the Calendar to schedule and complete activities.

Activity List

A categorized list of activities that are either associated with a particular Contact Record or assigned to a GoldMine user.

You can use the Activity List to view the pertinent details of an activity, display the Contact Record linked to a particular activity, schedule and complete the activity, and save vital reference information in the history file.

Local Menu

Local menu commands are available when you right-click in a field or browse window. The commands affect only options or information in the currently selected field or browse window.

Browse Window

This type of window displays lists of contacts, Calendar events, reports, and other items. Browse windows differ from other types of windows in GoldMine because they display information in columns.

Main Menu

The display bar located directly under the GoldMine title bar organizes the first level of commands in functional groups, such as **File** and **Edit**. Each group contains a pull-down menu of commands.

Status Bar

Located at the bottom of the GoldMine work area, this bar displays system-related information, such as time, date, user, and the status of **CAPS LOCK** and **NUM LOCK**.

Launching GoldMine

You can start GoldMine from either the Windows' Desktop or Taskbar:

- From the desktop, double-click the GoldMine icon.
- From the Microsoft Windows taskbar, click **Start** and select **Programs>>GoldMine>>GoldMine**.

The **GoldMine logon** window appears.



Type your **Username** and **Password**, then click **OK**.

Using the QuickStart Wizard

Note: The QuickStart Wizard is available only with GoldMine using a D-license.

The QuickStart Wizard appears immediately after you install GoldMine using a D-license to help set up the critical operations most users need right away such as e-mail accounts; however, you can use the QuickStart Wizard at any time after installation to add or change basic configuration settings.

Use the QuickStart Wizard to configure:

- Personal information for users such as name and title.
- General user data and security settings such as the individual's GoldMine user name and password and QuickStart Wizard access rights.
- Industry Solutions templates and GoldMine PLUS applications.
- Key field labels to store data useful to your business.
- Contact data imported from another contact management application into GoldMine.
- Internet e-mail account(s).
- GoldMine's links to document applications including Microsoft Word and Adobe Acrobat.

Accessing the QuickStart Wizard

You can use the QuickStart Wizard at any time after installation to add or modify settings. The QuickStart Wizard provides an easy, centralized alternative to working with a variety of other windows in GoldMine such as the **Preferences** window or the Users' Master File.

Depending on your security authorization, you can access the QuickStart Wizard from GoldMine's Main Menu or Taskbar.

Select one of the following methods:

- From the Main Menu, select **Tools>>QuickStart Wizard**.
- From the Taskbar, click the **Quick Start Wizard** button.



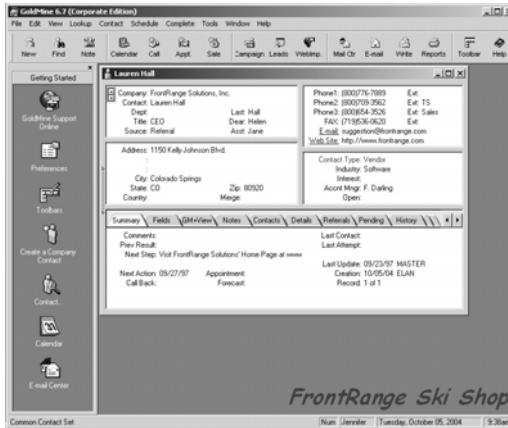
Instructions for using the various wizards are available in the online Help.

Navigating the Main Window

GoldMine's main window provides everything you need to manage your contact relationships. The default display is divided into several parts:

- The top portion of the window contains GoldMine's title bar, the Main Menu, and the toolbar.
- The middle portion of the window is the work area that always contains the active Contact Record, but also displays multiple Contact Records, your Calendar, E-mail Center, Contact Search Center, or any of the GoldMine windows and dialog boxes.
- The left side displays the Taskbar. Use it to place frequently used commands. You can organize commands into one or more groups according to your personal needs or the needs of your organization.

- The status bar forms the bottom line of the work area.



Main Menu

Commands are organized in pull-down menus. These menu commands define all of the operations available to a given user or Contact Record. Navigate through these menus using the mouse or keystroke combinations.

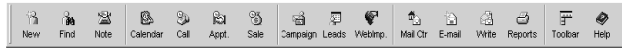
Each of the menus contains a set of commands, some of which feature submenus or additional displays. For instance, menu commands followed by ellipses (...) open dialog boxes from which you can select settings. Menu commands followed by an arrow display submenus that list more command options.

As you navigate through the menus, you may notice that some commands are not active. When this condition exists, it may be because:

- The unavailable option does not apply to the current selection.
- A different command option must be activated before you can select the inactive menu option.
- Security restrictions based on your user name or user group prevent your access to the unavailable option.

Toolbars

The toolbar contains buttons that execute GoldMine commands. Some of the commands are also available from the Main Menu. Depending on the toolbar setup, moving the mouse pointer over a toolbar button displays additional information about the button or command. The following figure shows the **Getting Started** toolbar.



Including the **Getting Started** toolbar, GoldMine has nine toolbars:

- **Getting Started:** Extended set of commands required for the primary tasks in GoldMine, such as creating a Contact Record, finding a contact, and viewing the Calendar.
- **Basic:** Commonly used commands, such as creating a Contact Record, viewing groups, and accessing the InfoCenter.
- **Standard:** Small set of frequently used commands.
- **Schedule:** Commands related to scheduling, viewing, and completing activities.
- **E-mail:** Commands related to sending phone, pager, e-mail, and network messages.
- **Misc.:** Miscellaneous commands, such as logging in another user, accessing Help topics, and displaying information about your GoldMine installation.
- **Record:** Commands related to viewing and working with Contact Records.
- **Tools:** Commands to run frequently used utilities, such as setting up a synchronization profile and running a system performance test.
- **Setup:** Commands related to defining various functions, such as defining custom fields and setting up an Automated Process.

Customize GoldMine's toolbar displays and capabilities to meet your needs. Some options include:

- Add one or more toolbars to the work area.
- Configure a toolbar display and capabilities.
- Create a custom toolbar.
- Remove a toolbar from the work area.
- Record a macro that can be assigned to a button and then added to a custom toolbar.



For information about adding, creating, removing toolbars, as well as how to add macros to toolbars, see the online Help or the *Administrator Guide*.

Taskbar


Located conveniently along the left side of the work area, the Taskbar holds links to your frequently used items. Customize it as needed to speed your workflow. You can drag and drop task icons to move them between the open taskbar and taskbar groups. Among other things, from the customized Taskbar, you can:

- Initiate GoldMine menu commands or macros.
- Launch an external application.
- Display a document.
- Launch a Web site.

Actions you run from the Taskbar are known as Task Items. You can organize up to 50 Task Items into a single Task Group.

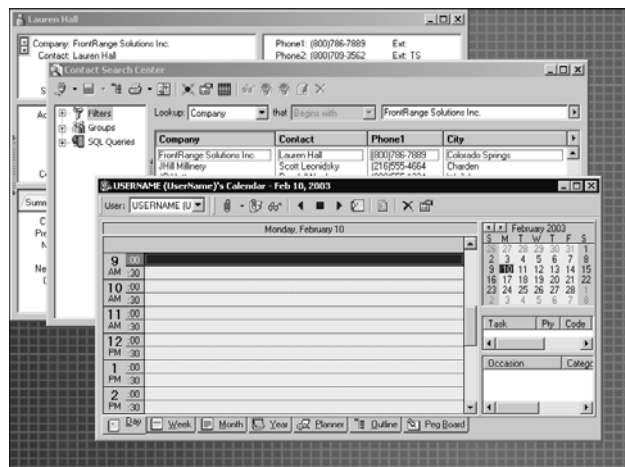
Any user can add up to 20 Task Groups to the Taskbar, and a system administrator can add up to 20 global Task Groups that can be made available to all users.

The activated Task Group title appears at the top of the Taskbar. GoldMine minimizes other available Task Groups at the bottom. To activate a different Task Group, click on the minimized title of the Taskbar that you want to use.

 For specific details about working with any of the Taskbar features, see the online Help.

Work Area

GoldMine's work area displays the Contact Record, Contact Search Center, Calendar, and other windows.



GoldMine can display more than one window at a time. Typically, the title bar of the active window is a different color than the title bars of inactive windows. You can customize the background with a special graphic, your company's logo, and even a text message.

Contact Record

The focus of GoldMine is the Contact Record. Almost everything you do with GoldMine relates back to a contact's record. The Contact Record contains basic information such as the name, address, and telephone numbers of a person or company with which you have a relationship. The Contact Record also contains supplemental information needed to manage that relationship.

The screenshot shows a window titled "Lauren Hall" with a tabbed interface. The tabs are: Summary, Fields, GM+View, Notes, Contacts, Details, Referrals, Pending, and History. The "Summary" tab is active, displaying the following information:

Company: FrontRange Solutions Inc.		Phone1: (800)786-7889	Ext:
Contact: Lauren Hall		Phone2: (800)709-3562	Ext: TS
Dept: Sales	Last: Hall	Phone3: (800)654-3526	Ext: Sales
Title: CEO	Dear:	FAX: (719)636-0620	Ext:
Source: Internet	Asst: Jane	E-mail: suggestion@frontrange.com	
		Web Site: http://www.frontrange.com	

Address: 1150 Kelly Johnson Boulevard	
City: Colorado Springs	
State: CO	Zip: 80920
Country:	Merge:

Record Type: Prospect
Industry: Technology
Interest:
Acct Manager: F. Darling
Open: Yes

Comments:

- Prev Result: GoldMine Internet E-mail Support
- Next Step: Visit FrontRange Solutions' Home Page at www

Next Action: 03/27/97 Appointment: Last Contact: Last Attempt:

Call Back: Forecast: Last Update: 10/05/04 MASTER Creation: 10/05/04 JENNIFER Record: 1 of 18

The Contact Record contains two major parts:

- Upper panes contain the primary contact information: name, address, telephone numbers, and user-definable Key fields.
- Lower part organizes secondary and activity information, such as pending activities and history records in tab folders.

A Contact Record is always active in the work area. More than one Contact Record can be open in GoldMine's work area, although only one is active at a time. You can position and resize multiple Contact Records as needed.

Status Bar

The status bar appears at the bottom of the GoldMine window and contains the following information:

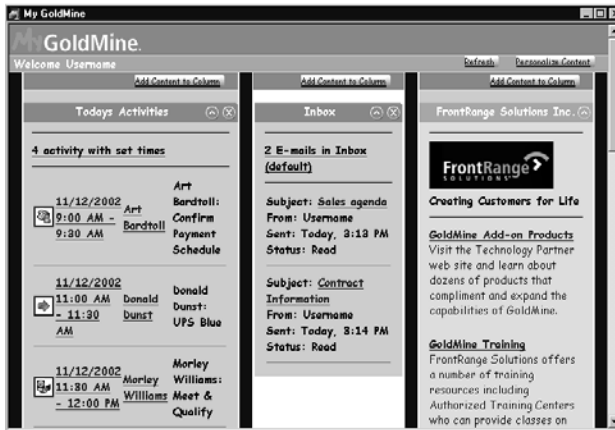
- Currently open contact database
- Time and date
- Currently logged user
- Status of **Num Lock** and **Caps Lock**

The status bar also displays brief descriptions of GoldMine's menu commands when you highlight them, or, in the case of the toolbar, when you point to a toolbar button.

Using My GoldMine

My GoldMine provides an up-to-the-minute resource for viewing the GoldMine and Internet information you need most during your workday. You can display a window in GoldMine that contains personalized content in an easy-to-view, customizable layout. You can view GoldMine information, including pending activities from your Calendar, updates about synchronization, information about new or changed Contact Records, items from the InfoCenter, and other information. If you have an Internet connection, you can also access Internet Web sites, such as news sites and business sites with content that you use frequently.

To start My GoldMine, select **View>>My GoldMine**.
The **My GoldMine** window appears.



My GoldMine displays content from specified sources in a summary format, including your daily Calendar for the current date, and Internet sites supporting Rich Site Summary (RSS). Click on hyperlinks to display details from GoldMine or the linked Internet sites.

Configuring My GoldMine

You can select the layout and content to customize My GoldMine to provide the information you need in a format that you prefer. You can also set a refresh rate to ensure that the display is always current. All of the settings are available in the Configure My GoldMine window. To configure the My GoldMine display, select **File>>Configure>>My GoldMine** or click the **Personalize Content** hyperlink on the upper-right side of the My GoldMine window.

In the **Configure My GoldMine** dialog box, you can set the layout of the window, the content for each column, and the refresh rate for the information.

You determine the content of the columns and select the type of information you want to display in My GoldMine from within GoldMine, such as your scheduled activities for the current day, or a Rich Site

Summary (RSS) site from the Internet. You can select multiple items for each column.

Note: My GoldMine displays only RSS-supported Internet sites.

The online Help provides step-by-step information about configuring and adding information to your My GoldMine display.

Working in My GoldMine

After you set up the appearance, content, and refresh rate for My GoldMine, you can display the GoldMine information and Web site content that you need. You can access Internet sites from within My GoldMine by clicking on hyperlinks.

Buttons and commands inside the My GoldMine window enable you to control the operations and the display, including adding, minimizing, or removing items in individual columns. You may also copy information from My GoldMine into other applications.

The online Help provides step-by-step information about configuring and adding information to the display, as well as using My GoldMine.

Quitting your Work Session

Use one of two recommended methods for quitting a work session:

- Log away, but leave GoldMine running in the background.
- Exit to close GoldMine.

Logging Away

Sometimes, you might need to leave your desk temporarily, but you do not want to quit GoldMine. In this situation, you can log away yet leave GoldMine running in the background.

Select **File>>Log Away**. In the **I'm Away from my desk** dialog box, you can notify other users of your whereabouts and your estimated return time. The information displays on the Calendar Pegboard.

Exiting GoldMine

Be sure to exit GoldMine when you want to close the program on your system.

- Select **File>>Exit**.
- To quit GoldMine from the keyboard, press **ALT+F4**.

in this chapter...

- Creating Contact Records
- Working with Contact Records
- Using HTML Editing Features
- Copying Data from a Contact Record
- Viewing Contact Records
- Deleting Contact Records
- Opening Another Database
- Additional Tools to Manage Contacts

CHAPTER THREE

Managing Contact Records

Overview

All functions and tasks in GoldMine revolve around the Contact Record. After a record exists for a contact, GoldMine enables you to connect all related information and tasks to the Contact Record.

This chapter discusses how you can create, copy, edit, view, or delete Contact Records.

Tip:

For more information on importing, see the online Help and the *Administrator Guide*.

Creating Contact Records

Contact Records are the center of the GoldMine database. The import options in GoldMine, from dBASE, ASCII, SDF, XML files, or using predefined profiles for other programs, allow you to create your contact database from outside sources. Once you are working within GoldMine, you have several methods available to you for creating a Contact Record. You can access these methods by selecting **File>>New Record**.

You can select one of the following methods:

- **New Company and Contact:** Creates a contact for a new company. Using this method, you can also create a separate Contact Record for an existing company.
- **Add New Contact to an Existing Company:** Adds a new contact to an existing Contact Record. Use this to add personnel for a company already recorded in your database.

The existing company Contact Record must be active in the work area for this action to be successful.

- **New Org Chart, Company and Contact:** Creates both a Contact Record and an associated Organization Chart simultaneously.
- **Add a New Contact to an Existing Org Chart:** Creates a Contact Record and links it to an existing Org Chart. This option is available with GoldMine Corporate Edition using an E-license.

Creating a New Company and Contact

To access the most commonly used creating method select **File>>New Record>>New Company and Contact**.

The **New Company and Contact** dialog box appears.

The dialog box contains text boxes for gathering basic information, such as Company name, Contact name, the contact's main telephone number, the contact's Internet e-mail address, and the company's Web site.

To handle special circumstances, you can select one or both **Creation Methods**:

- **Create duplicate record:** Select this check box only if you want to populate all but the Contact name and E-mail Address text boxes with data from the active Contact Record.

You would use this feature, for example, if you were establishing a new Primary contact for a department different from the company department existing in the database.

- **View in new window:** Select this check box if you want to display the new record being created as the active Contact Record in the work area.

Use the **Duplicate Checking** area to ensure that you do not create a Contact Record for a contact already in the contact database. Select **Phone number, E-mail address, Contact name,** and **Company name**. The more items you select, the more accurate the checking. By default, the Phone number and E-mail address are selected. If you don't mind if a duplicate record is created, clear the default-selected check boxes.

Adding a New Contact to an Existing Company

In addition to the primary contact of a company, you can add another contact to a Contact Record. Typically, this would be an individual associated with the primary contact, such as another employee at the same company or account. An obvious example would be to add a new sales representative located in a different region of the country.

Select **File>>New Record>>Add New Contact to an Existing Company**.

The **Contact Search Center** appears, overlaying the **New Contact to an Existing Company** dialog box. Using the Contact Search Center, select the Company to which you are adding the contact, and then complete the information needed to add the contact to the selected Contact Record.

Creating a Contact Record, Company, and Org Chart

You can create a Contact Record for a new company, then link the record to a new Org Chart. Select **File>>New Record>>New Org Chart, Company and Contact**.

The **New Org Chart, Company and Contact** dialog box appears.

New Org Chart, Company and Contact

Org Chart Name:

☐ Create a new section:

Company

Contact

Phone Number Ext. ☐ International Format

E-mail Address

Web Site

Creation Method

☐ Create duplicate record

☐ View in new window

Duplicate Checking

☒ Phone number ☒ Contact name

☒ E-mail address ☐ Company name

☐ Org Chart Name

OK Cancel

Using the **New Org Chart, Company and Contact** dialog box, the process to create a contact is similar to the process to create a Contact Record at a new company, except that you must also name the new Org Chart and designate the location where you want to place the Contact Record in the new Org Chart.

Adding a New Contact to an Existing Org Chart

This option is available with GoldMine Corporate Edition using an E-license.

To create a Contact Record and link it to an existing Org Chart select **File>>New Record>>Add a New Contact to an Existing Org Chart**.

The **Find an Org Chart** dialog box appears, overlaying the **New Contact to an Existing Org Chart** dialog box. In the Org Chart Name text box type the name of the existing organization. GoldMine displays the matching organization(s) in the lower pane. Select the organization and then click **OK**. GoldMine displays the name of the organization in the Org Chart Name field. Complete the information for the new contact and click **OK**. A new Contact Record is created and the Org Chart displayed.

Working with Contact Records

After creating a Contact Record, you can either add detailed information immediately or edit the record at a later time. You can add basic information to the upper portion of the Contact Record, or work with the tab bar in the lower portion to add a variety of information, including notes, helpful document links, and more.

Adding Basic Information

After you create a Contact Record, you can add basic details to the record, such as the individual's title, department, and fax number. To move within the form, either click in a text box or press **TAB**. Click the field's F2 Lookup and select a value from the F2 Lookup list. Another option is to manually type information in the text box.

Adding Data in Tab Folders

The Contact Record stores a wide range of information that is accessible from the Contact tab folders. The Contact tabs include GoldMine's standard tab folders and other folders you can customize to meet your organization's needs. The following section describes the standard tabs.

Summary

The **Summary** tab provides details on activities for the active Contact Record. GoldMine automatically generates the information in these fields whenever an activity is scheduled or completed.

Fields

The **Fields** tab displays customizable fields. Upon installation, GoldMine provides two standard screens, the End User Screen and Tech Support Screen. Each screen can hold additional detailed information for the active Contact Record.

GM+View

The **GM+View** tab displays HTML-based views. Similar to a Web page, these views can include text, graphics, and other rich content to convey various types of information about your contacts.

Notes

The **Notes** tab contains general information about a contact. Use Notes only when the information cannot be stored in a more appropriate place, such as Details or the Calendar.

Contacts

The **Contacts** tab presents information about additional contacts or those individuals associated with the primary contact, such as an administrative assistant. You can also use this tab to store alternate address information, such as a billing address or branch office.

Details

The **Details** tab provides an unlimited number of fields to store supplemental information for the Contact Record, such as e-mail address, Web site address, and credit card data.

Referrals

The **Referrals** tab shows any bidirectional associations that link a Contact Record with one or more other Contact Records. Such referrals may be used to automate and track the distribution of an organization's leads or related records. This tab displays date, referral, reference, and user information for the associations pertaining to the given contact.

Pending

Any upcoming or scheduled activities that are related to the contact are displayed on the **Pending** tab. Data pertaining to date, time, user, and reference information can be included.

History

The **History** tab summarizes the date, activity, user, and reference information for all the completed activities related to the active Contact Record.

Links

The **Links** tab lists available documents or applications associated with the Contact Record. Each entry includes information about the document, type, file, date, and user.

Members

If the contact belongs to a Group, this is reflected in the **Members** tab. Groups are a way of creating subsets of records.

Tracks

A track consists of one or more events, which are step-by-step instructions GoldMine must evaluate to perform a specified series of activities. The Automated Process tracks assigned to the Contact Record are displayed on the **Tracks** tab.

Opptys

If the contact is linked to an opportunity, this information is conveyed on the **Opptys** tab. The opportunity name, forecast, age, status, and stage are displayed.

Projects

The **Projects** tab notes the long-term projects to which the contact is linked and provides specific data relative to the project, such as name, start date, end date, age, status, and stage.

Tickets

The **Tickets** tab is available with GoldMine Corporate Edition and displays ticket information when integrated with HEAT Call Logging.

Using HTML Editing Features

GoldMine offers HTML capabilities you can use to enhance text and graphics in your e-mail messages, activities, and other records. In addition to using HTML editing features for formatting text and layout, GoldMine now provides access to the HTML source code for direct editing in some of the areas.

You can work with the HTML options whenever you work with in the following GoldMine functions:

- **Configuring GM+View**
- **Editing InfoCenter**
- **Editing E-mail**
- **Scheduling Activities**
- **Completing Activities**

In the **Notes** area of the Schedule and Complete an activity dialog boxes you can use bold, italics, and underline features, as well as set the font color and size, and the font highlight colors. Spell checking is also available. In the **GM+View** tab, the InfoCenter, and when editing e-mail, you have the above features, and you can align text, insert images, add background color to the **GM+View** tab and e-mail, and edit in the HTML source code mode.

Copying Data from a Contact Record

You can copy information from an active Contact Record to the Windows clipboard. This timesaving feature is especially useful to paste basic contact information into another application.

Select **Edit>>Copy Contact Details**. The **Copy Contact Info to Clipboard** dialog box appears.



The check boxes correspond to fields in the upper portion of the Contact Record. By default, GoldMine selects the **Name, Address** option. Select one or more types of primary contact information. When done, click **Copy**.

After you copy the information to the clipboard, switch to the destination application, place your cursor into the position where you want to paste the copied data, then press **CTRL+V**.

Viewing Contact Records

One Contact Record is open in the work area at all times. You can display more than one Contact Record in the work area, and position and size them in many ways. To simultaneously display two or more Contact Records in your work area, select **View>>New Contact Window**.

The most recently opened record becomes the active record and is displayed in front of other open records.

Deleting Contact Records

Over time, you may need to delete old or unwanted information from your contact database. You can delete a single Contact Record or you can delete multiple Contact Records.

Deleting the Active Contact Record

You can delete an entire Contact Record or specific information in a Contact Record. For example, you might want to remove an old Contact Record yet keep the history records associated with the contact. Alternatively, you might want to update a Contact Record by deleting old history records or old activity records.

In most cases you will delete an entire Contact Record; however, you have the option to delete only the history or activity records for the contact.

To delete all or part of a record, the record must be active on the screen. Select **Edit>>Delete Contact**.

The **Delete Contact Record** dialog box appears.



Use the **Delete Contact Record** dialog box to delete the entire Contact Record, only scheduled activities, history records, or the opportunity/project records. You can also choose to synchronize the deletions.

Review and select the appropriate check boxes. By default, GoldMine deletes all information associated with the Contact Record and will synchronize the record's deletions. Be sure of your choice before you click **Delete**. After GoldMine deletes the record, you cannot undo the operation.

When completed, GoldMine briefly displays information about the results of the operation (which records were deleted) in the status bar.

CAUTION: In dBASE databases, a deleted record is marked for deletion but is not physically erased from the database until you perform database maintenance. GoldMine does not display or work with the record after it is marked for deletion. GoldMine's performance slows as the number of deleted records in the contact database increases.



Rebuild the database periodically to physically remove these deleted records and release the disk space occupied by the deleted records. For details, see "Rebuilding and Packing the Database" in the online Help.

CAUTION: GoldMine Corporate Edition using E-license databases hosted on an Microsoft SQL Server completely deletes the Contact Record and do not require rebuilding and packing unless you are creating user-defined fields.

Deleting Multiple Contact Records

At some time you might need to update your contact database by deleting some or all Calendar records, history records, or Contact Records. GoldMine's **Delete Wizard** provides an easy method to delete multiple records with a built-in safeguard to reduce the possibility of an unintentional deletion.

Keep in mind that only users with Master Rights can delete history records or multiple Contact Records.

To delete many records at once, select **Tools>> Delete Records Wizard**. Using the Delete Wizard, you can select the records that you want to delete from the following options:

- **Delete old history records:** Use this feature to purge the database of history records that are older than a predetermined cutoff date. You can delete all history records from the contact database—or activate a filter or group and then use this option to delete history records from the subset of records.

History records occupy the largest percentage of a contact database's disk space. Removing old history records periodically can significantly reduce the amount of disk space used by contact sets.

- **Delete ALL (filtered) contact records:** Deletes all records or a subset of records from the contact database. Although you can use this command without a filter or group to initialize a database, using DOS commands to delete the subdirectory and then recreating the file using the **File>>Open File** command is much faster.
- **Delete this contact record:** Deletes the active Contact Record, including all associated additional contacts, detail record entries, and referrals. History records for the contact are not deleted, but become unlinked activities.

Opening Another Database

GoldMine stores Contact Records in a contact set. During installation, GoldMine creates the Common Contact Set. We recommend you store all Contact Records in one database; however, you can create additional databases to store data.

Select **File>>Open Database**. The **Contact Set Databases** dialog box appears. Open another database, add a database, or manage existing databases from this dialog box.

Additional Tools to Manage Contacts

In addition to the features covered in this chapter, you can run the operations listed below to work with your Contact Records. To access these features, select the corresponding commands from GoldMine's Main Menu:

- To define the telephone number formatting, access rights, and assign alert codes to the active Contact Record, select **Edit>>Record Properties**.
- To attach an Automated Process to the active Contact Record, select **Contact>>Assign a Process**.
- To maintain a Personal Rolodex of important or commonly used telephone numbers for your private use, select **View>>Personal Rolodex**.
- To define custom fields to display contact information useful to your work, select **File>>Configure>>Custom Fields**.
- To import Contact Records from a database created by another contact management application, select **Tools>>Import/Export Wizard>>Import Contact Records**.
- To consolidate duplicate Contact Records, select **Tools>>Merge/Purge Records**.



in this chapter...

Search Tools
Using the Lookup Menu
Using the Contact Search Center
Search Methods



CHAPTER FOUR

Searching for Contact Records

Overview

Trying to find information about a contact by looking through Contact Records one-by-one is inefficient and time-consuming, especially in a large database. GoldMine provides users with quick and easy retrieval methods.

For example, if you receive an unexpected call from a client, you can run a quick search for a contact by any information that you have entered into GoldMine, such as name, telephone number, or even an e-mail address.

Search Tools

GoldMine provides two primary tools to search for Contact Records:

- Lookup Menu
- Contact Search Center

Using these tools you can search using several methods:

- Searching for a field value in the Contact Record.
- Using a filter or SQL query to search for records.
- Recalling recently viewed records.
- Navigating to the location in the database where the record was added.

Using the Lookup Menu

The **Lookup** menu allows you to search for records by a variety of methods. The most common indexed fields are listed first on the menu. Select **Lookup>>Indexed Fields**.

When you select the Lookup menu's **Indexed Fields** and **Additional Lookups**, the Contact Search Center appears.

The **Filters and Groups** dialog box appears when you select either **Filters** or **SQL Queries**. Selecting **Text Search** opens search dialog boxes for each item, such as the **Searching All Fields** dialog box.

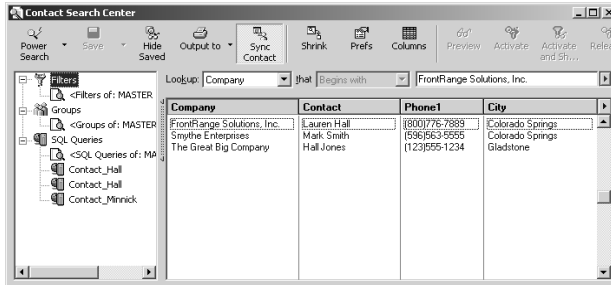
Using the **Go To** item maneuvers within the Contact Record. For instance, if you select **Go To>>Next Record**, the next record becomes the active Contact Record.

Selecting **Internet Search** opens the **Internet Search** dialog box where you can navigate to an existing search engine or create a new search entry.

Using the Contact Search Center

The Contact Search Center provides a central, powerful search window, allowing you to find one Contact Record or a filtered group of records based on specific criteria. There are four major areas of the center:

- **Toolbar:** A series of buttons that execute commands within the Contact Search Center.
- **Lookup options:** A set of text boxes located just below the toolbar, made up of a Lookup drop-down list, operator drop-down list, and a value text box. You can configure a search using a combination of these options.
- **Browser columns:** Lists the results of the search.
- **Saved searches:** The left pane contains a tree of predefined searches using filters, groups, or SQL queries.



Contact Search Center Browser Columns

The heart of the new Contact Search Center are the browser columns. Search results are presented here. You configure the browser columns to display the information you find useful for the contacts.

If you search based on one of the three displayed columns, usually Company, Contact, and Phone, the fourth column displays the default (typically, City). One of the column options is a sort order field,

Tip:

Keep in mind that the search using a Lookup menu command (such as Company, Contact, Last, Phone1, or any of the Indexed Fields) depends on the label assigned to the field. For example, if you change the label on the Company field to Corporation, the Lookup menu command to search this field appears as Corporation.

Tip:

If you select Power Search from the toolbar, the Lookup options area expands to include an expression builder. For details on using the Lookup options, see the online Help.

Tip:

The browse columns area resembles the Contact Listing from previous versions of GoldMine.

corresponding to the search field that you selected in the **Lookup** drop-down list. For example, if you select **Lookup>>Last**, the Contact Search Center's sort order field column is **Last** (name).

When you see the Contact Record that you want in the Contact Search Center, you can display the record by either double-clicking on the entry, or pressing **ENTER**. To return to the Contact Search Center, click on any visible portion of the Contact Search Center.

The **Browser Column** local menu is a shortcut menu accessed by right-clicking within the column area. The menu makes the following commands available:

- **Show Record:** Synchronizes the Contact Record that matches the record selected in the browser column.
- **Select Columns:** Displays the **Browser Column Selection** dialog box, from which you can select the columns that appear in the Contact Search Center's browser column area.
- **Find:** Displays the **Find** dialog box, from which you can search for contacts based on entered text.
- **Output to:** Sends the data to one of the following:
 - Printer (available only to users with Master Rights)
 - Word
 - Excel
 - Clipboard

You select the columns to display in the Contact Search Center and in which order.

From the Contact Search Center toolbar, either click the **Select Browser Columns** button or choose **Select Columns** from the local menu.

Using the **Browser Column Selection** dialog box, you can add or remove columns from the Selected columns list, or change the position of columns using the **Up** and **Down** buttons. The **[Sort Order Field]** displays the field in the **Lookup** drop-down list.

Advanced Searches

The Contact Search Center allows you to save search criteria for reuse. The list of previously saved filters, groups, and SQL query searches is displayed in the left pane of the center.

You can display or hide the list by either of two methods:

- On the Contact Search Center toolbar, click **View Saved**.
- On the separator bar to the left of the browser columns is a dotted blue line you can use to hide or display the saved searches pane.

Using the Saved Searches local menu you can select one of the following options:

- **Preview:** Displays the results for the selected search in the Contact Search Center so that you can view the selected records before activating the search.
- **Activate:** Activates the selected search.
- **Release:** Releases the activated search.
- **Edit:** Displays the **Filter** dialog box, from which you can edit the selected search.
- **Delete:** Deletes the selected search.
- **Close Tree:** Hides the search tree.
- **Refresh:** Updates the saved search list.

Tip:

You can customize the Contact Search Center column display and order. For details, see "Contact Search Center Browser Columns" on page 4-3.

Power Searching

You can set up, run, and save searches using the options and commands available within the Contact Search Center. On the toolbar, click **Power Search** and select one of the following search methods:

- **Lookup by (simple) search:** Executes a search using the criteria selected in the Lookup options drop-down list, such as Company.
- **Search using Filters:** Displays an expression area with lookup, operator, and value text boxes, where you can create, activate, and release filters based on extended Boolean expressions.
- **Search based on History, Calendar, or Details:** Launches the **Group Building Wizard**, where you can create a group of contacts to search.
- **Search using an SQL Queries:** Opens the **Filters and Groups** dialog box, where you can create an SQL query.



For details about running any of these searches, see the online Help.

Filters

- **Activating and Showing Preview:** Activating limits the records you can work with in the active contact window and Show Preview displays the filtered records in the browser columns. Using activate and preview together is an effective way to work with a large number of records.
- **Cloning:** Creating a copy of a filter is a useful way to preserve an existing filter and also provides a copy you can alter.
- **Editing:** Altering the search criteria of a filter allows you to change the results returned by the search.
- **Drilling Down:** Previewed filters may result in more contacts than you want to work with initially. The **Drill Down** button allows you add criteria to a filter, thus limiting your displayed results.

- **Optimizing:** The option to speed up search performance by optimizing the filter adds to your ability to build a filter in the Contact Search Center.

Optimizing search filters allows you to restrict the records initially evaluated to match the filter criteria before the filter is run against your database. This is especially useful when you are working with a large database and want to limit your results in order to save resources and time.

You can optimize using the toolbar as you are building a filter or when previewing a filter.

- **New Filter dialog box:** A dialog box creates a workflow that parallels the Group and SQL Query processes. You are prompted to provide a name and select the owning user.

Groups

- **Adding New Members:** Adding new members with the **Group Building Wizard** is easily accessed when you right-click on a group and select **Add New Members**.
- **Adding New Members with Drag-and-Drop:** Using the drag-and-drop feature for groups, you can add members to a saved group. To add members, they must be displayed in the browser columns of the Contact Search Center. The records you add can be from a saved filter you are previewing or from a newly created filter. You can also add many contacts at once by tagging the records and then dragging them to the group.
- **Previewing:** Displaying the members of the group in the browser columns makes it easy to evaluate and work with the group in the Contact Search Center.
- **Activating and Showing Previews:** Activating limits the records you can work with in the active contact window, while Show Preview displays the group of records in the browser columns. Using the two together is an effective way to work with a large group.

- **Cloning:** Creating a copy of a group is a useful way to save the members of an existing group with a new name. The newly cloned group provides a copy of the group to use as the foundation for a new group of contacts.
- **Editing:** With groups, editing consists of changing the name of the group, the code, or the owner. Remember, you can use either the easy drag-and-drop function to add members to the group or the **Add New Members** menu command.
- **Drilling Down:** Previewing groups may return more contacts than you want to work with initially. The **Drill Down** button allows you add criteria to a Previewed group, thus limiting your results.
- **New Group dialog box:** The dialog box creates a workflow that parallels the Filter and SQL Query processes. You are prompted to provide a name and select an owning user.

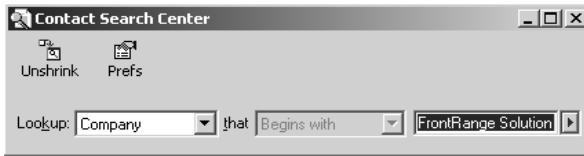
SQL Queries

- **Creating SQL Queries:** Creating SQL Queries within the Contact Search Center provides easy and consistent access to the third type of saved searches. Right-click on **SQL Queries** in the **Saved Search** pane and select **New**. The **New SQL Query** dialog box appears.
- **Cloning:** Cloning a saved SQL Search while working in the Contact Search Center preserves the existing query while allowing you to change the criteria.
- **New SQL Query dialog box:** This dialog box creates a workflow that parallels the Filter and Group processes. You are prompted to provide a name and select a primary user.

Contact Search Center Display Size

The Contact Search Center is available in two sizes:

- **Expanded:** Displays all search options. By default, GoldMine displays the Contact Search Center in the expanded mode (as seen in previous sections).
- **Truncated:** Displays minimal search options. The shrunken view takes less room in your work area, but displays less information.



The truncated Contact Search Center may be adequate for your search needs, especially if you are trying to retrieve a single Contact Record. However, when you expect to retrieve a number of records or want to use the options available in the Contact Search Center, the expanded mode may be better suited to your search needs.

Click **Shrink** or **Unshrink** button on the Contact Search Center toolbar to change the display size.

Tip:

Standard GoldMine uses dBASE contacts sets only and does not support SQL databases. However, you can run an SQL query on a dBASE contact set.

Search Methods

Using the search tools, you can search by several different methods. For example, you can search for a field value in the Contact Record, search a specific indexed field or a detail field, or search all fields. These methods are discussed below.

Searching Indexed Fields

GoldMine maintains indexes on the following fields: Company, Contact, Last (name), Phone1, Zip, City, Country, Account No, and the five user-defined Key fields, appearing in the lower right pane, under the telephone and Web fields on the Contact Record.

By using one of these fields for your search, you can locate a Contact Record almost instantly. Search for indexed field values either directly from the Contact Record or from the **Lookup** menu.

Searching Directly from a Contact Record

Search for a field value directly from any active Contact Record by double-clicking on the field label of the field that you want to use as the basis of your search.

For example, to run a search based on the name of the contact's organization, double-click on the Company field label of the active Contact Record. This opens the Contact Search Center with Company selected in the Lookup drop-down list.

Searching by E-mail Address or Additional Contacts

Whether your interaction with an organization is primarily by e-mail correspondence or with an individual other than the primary contact, you may want to use those values to search for records.

The **Lookup** menu contains a special Additional Lookups category that contains commands to perform searches on e-mail addresses or by the names of additional contacts.

Select **Lookup>>Additional Lookups**, then select either:

- **E-mail Address**
- **Additional Contact Name**

Searching Detail Record Fields

You can search for Contact Records based on a Detail record without creating a group. A Detail record allows you to store additional types of information about a contact than is provided by standard GoldMine fields.

Tip:

You can also search for contacts based on Detail records from the Contact Search Center. Click Power Search, then select Search based on History, Calendar, or Details. The Group Building Wizard appears, from which you can define criteria to build a group based on the detail records you want to use as the basis of the search.

For example, you may want to save birth date information about each contact so that you can send a birthday card each year. GoldMine stores Detail records under the **Details** tab of the Contact Record.

Select **Lookup>>Detail Records**.

Using the **Lookup a contact based on a detail** dialog box, you can specify the Detail category that you want to find, as well as a specific Detail Reference. For example, you might select the Detail type Computer when you want to find all contacts you have indicated own computers.

Searching with Filters and Groups

You can search subsets of Contact Records based on selected criteria. Filters and groups are two of the methods available in GoldMine to manage data subsets. Although each method makes a database appear to contain only a portion of the Contact Records, the two methods differ greatly in the way they handle these subsets.

GoldMine's filters are based on Boolean expressions. Boolean expressions are logical statements that have one of two possible outcomes: true or false.

Whenever you activate a filter, the entire database is evaluated based on the Boolean expression. The Contact Records that match the Boolean expression are selected. The records that do not match are ignored by the filter.

Groups provide another method to work with subsets of records. A group is a fixed set of records that meets a specified set of conditions. Because the groups you create are static and do not change to reflect changes in the database, access to records of the group members is instantaneous.



For more details on GoldMine's filters and groups, see the online Help.

Searching with SQL Queries

You can create and activate SQL queries even if you are using a dBASE database. Using an SQL query for your search has advantages over using dBASE filters, including:

- **User-friendly syntax:** GoldMine's SQL queries are closer to natural language than dBASE filter expressions. Users who are not familiar with programming syntax may be more comfortable working with SQL queries.
- **Wider search capabilities:** SQL queries can search the entire GoldMine database system, while dBASE filters can experience limitations. For example, a dBASE filter might exclude Opportunity Manager records in a search, but an SQL query will search through all tables in contact sets.
- **Easier, more reliable search execution:** Expressions with some operators, such as NOT, are easier to run in an SQL query than a standard dBASE filter expression, especially on group data.

You can access SQL Queries from the Contact Search Center. On the toolbar, click **Power Search** and select **Search using SQL Queries**.

You can also access SQL queries from the Lookup menu. Select **Lookup>>SQL Queries**. The **SQL Query** tab displays in the **Filters and Groups** dialog box.

Searching with Text Search

The fastest way to find a Contact Record is to search based on indexed fields or detail fields. However, if the specified search value is embedded in the field you are searching, or if the value is entered in a non-indexed field, GoldMine will not find the Contact Record.

If you need to find a Contact Record based on information contained within indexed or non-indexed fields, you can work with GoldMine's text search feature.

Select **Lookup>>Text Search**. You can then search the following fields for the contact:

- **Primary Fields:** Searches all Contact1 fields, which are the fields in the upper portion of the Contact Record.
- **Fields Below Tabs:** Searches all Contact2 fields in the **Summary** and **Field** tabs.
- **Notes:** Searches entries under the **Notes** tab in all Contact Records.
- **All Fields:** Searches Contact1 and Contact2 fields in all Contact Records.

Comparing Text Search to Searching on Indexed Fields

Searching on indexed fields differs in scope from searching all fields. Searching for a value in an indexed field limits the search to only the selected field. Alternatively, the Text Search command examines the entire contents of each field of every Contact Record in the database to find a value.

The following analogy describes the difference between performing a search based on the indexed fields and running a Text Search. Finding records by indexed fields is like looking for a phrase by searching the book's index for the phrase, then jumping to the page number listed in the index entry; while a text search searches each page of the book for the phrase.

You must have the exact first letter of the first word in the phrase to look up a phrase in an index and thereby find the page reference. Finding records by using one of the Text Search commands is like looking for a phrase in a book by reading the book from the first page to the end.

Searching with Go To

Performing a search based on a field value or character string is an efficient method of finding a Contact Record, but may not always fit every search situation. Another method of finding a record is to locate the Contact Record by navigating through the contact database.

For example, if you can't recall the name of the contact you entered just before you received a telephone call, you can find the record quickly by cycling through the last-viewed records in the database.

You can navigate through the contact database to find a record by either of the following methods:

- Cycle through records that you have recently displayed.
- Retrieve a record by location or number in the database.

Cycling Last-Viewed Records

You can display the Contact Record viewed prior to the last-displayed Contact Record. Select

Lookup>>Go to>>Cycle Last Viewed Records.

GoldMine displays the record that was active just before the currently active record in the same window.

Searching by Location in the Database

You can retrieve a record by navigating through the database. This method might be useful if you know when the Contact Record that you want to display was created in relation to all of the records.

Select **Lookup>>Go to**, then select one of the following commands:

- **Next Record:** Displays the next Contact Record in the database. Selecting this command is the same as pressing **Page Down**.
- **Previous Record:** Displays the previous Contact Record. Selecting this command is the same as pressing **Page Up**.
- **First Record:** Displays the first Contact Record based on the current sort order.
- **Last Record:** Displays the last Contact Record based on the current sort order.
- **Go to Record Number:** Displays the **Enter a record number** dialog box. When you create a Contact Record, GoldMine assigns a sequential number to the record. The number of the Contact Record with input focus appears in the Goto Record field.

When you select Next Record, Previous Record, Top Record, or Bottom Record, the record displayed depends on the active sort order and on whether or not a filter or group is activated.

Over time, record numbers can change. When the contact database is packed, all records in the database are renumbered sequentially.

Searching with Internet Search

Using GoldMine's Internet Search, you can search throughout the World Wide Web (www) for information about a contact, organization, or a community.

Select **Lookup>>Internet Search**. The **Internet Search** dialog box appears.

By default, the **Internet Search** dialog box selects field values from the active Contact Record as the subjects for a search.

GoldMine selects the Company value as the subject for a Corporate Search, and the primary contact as the subject for a Person Search. Under each of these entries are listed the search engines that you can use to run the search.

To start a search of the Internet for information about the contact, you can either:

- Double-click the search engine you want to use.
- Highlight the search engine, and then either select the **Search now** button on the Internet Search toolbar or select **Search** from the local menu.

GoldMine accesses the Web site of the selected search engine, launches the search, then displays the results. You can select an entry from the search results to connect to the corresponding Web site.

Tip:

You can either connect to your Internet Service Provider (ISP) before working with Internet Search, or GoldMine can prompt you to connect to your ISP.

in this chapter...

Managing Contacts in an
Organization Chart
Optimizing the Org Chart
Combining Records of Organization
Members

CHAPTER FIVE

Organizing Contact Records

Overview

When you work with several contacts associated with one company or organization, use GoldMine's additional contacts to record multiple individuals in one record. However, when you need to organize a large number of contacts within one organization or group individuals from different organizations, the GoldMine Organization Chart (Org Chart) provides a better view of the relationships.

Managing Contacts in an Organization Chart

GoldMine's Organization Chart arranges contacts in a tree structure, graphically displaying information and relationships.

Using Organization Charts to group contacts, you can:

- Look up related contacts by department, function, or any user-defined criteria.
- Create groups out of multiple organizations or sections within one organization.
- Link a contact to more than one organization or section within an organization.

Accessing the Org Chart

GoldMine inserts the Organization Chart into the left pane of the Contact Record. You can display the Org Chart in one of three ways:

- Select **Edit>>Record Details>>Organization**.
- Press **CTRL+Q**.
- Click the dotted blue lines on the separator bar on the left side of the Contact Record.

If a Contact Record has not been linked to an organization, the Org Chart (left pane) is blank.

To expand the tree and display the sections and members of an organization, double-click on the book icon. To display a Contact Record listed in the Org Chart, click on the icon to the left of the contact's entry.

Creating Organizations

You can create an organization based on the active Contact Record, or by looking up another Contact Record from the Contact Search Center.

GoldMine creates an organization and links the specified Contact Record. The organization's name is taken from the Company field of the selected Contact Record.

To create an organization, click the **New Org Chart** button in the Org Chart toolbar.

After you link the Contact Record to a new or existing organization, the Org Chart automatically updates to show the link. You can then define the organization properties, as well as add sections to the organization.

You can create up to five subsidiary levels under each organization. You can link contacts to any section.

Creating Sections

Add sections to an Org Chart to categorize contacts within the organization. For example, you might want to subdivide an organization into divisions or departments.

Right-click on the organization to which you want to add a section. Select **New Section**.

Using the **Section Properties** dialog box, you can configure the following:

- **Section Heading:** Type a name for the new Section Heading.
- **Link to contact:** Select if you want to link to the current contact.

- **Insert new section:** Assign the new section to a specific location in the Org Chart by selecting one of the following options:
 - **Under x section:** Creates a subsidiary folder to the existing folder.
 - **Above x section:** Creates a section at the same level as the existing folder, and moves the new section above the existing folder.
 - **Below x section:** Creates a section at the same level as the existing folder, and moves the new section below the currently selected folder.

Linking Contacts

You can link a contact to an organization or section in the organization. Right-click on the organization or section to display the local menu, select **New Contact**, then select the command corresponding to any of the following methods:

- **Look up an existing Contact and add it to the Org Chart/Section:** Links an existing contact to the selected Org Chart.
- **Create a new contact and link:** Creates a Contact Record, then links the record to the Org Chart.
- **Link all Group/Filter Contacts to the Org Chart/Section:** Links all Contact Records in an activated filter or group to the Org Chart.

Deleting Entries from the Org Chart

You can remove a selected organization link from the active Contact Record, then remove the contact from the organization.

From the Org Chart, right-click on the organization that you want to remove and select **Remove**.

Searching for an Organization

If you use GoldMine Corporate Edition with an E-license and Microsoft SQL Server, you can search for an Organization Chart to either:

- Add a contact to an existing organization: Select **File>>New Record>>Add a New Contact to an Existing Org Chart**
- Look up information in another Org Chart: Click the **Look up an Org Chart** button on the Org Chart toolbar.

Using the **Find an Org Chart** dialog box, type the name of the organization and GoldMine displays the matches in the large area.

However, if you activated roll up for a selected section of an organization, GoldMine lists pending activities *only* for the contacts linked to the selected section (and any subsections).

Optimizing the Org Chart

If you use GoldMine Corporate Edition with an E-license and an SQL database, users with Master Rights can run a process to increase the speed of lookups and duplicate record checks in the Org Chart.

CAUTION: Be sure to use SQL backup procedures to back up your data before starting to optimize.

GoldMine logs out users before starting the optimization process.

To optimize, select **Tools>>Optimize Org Chart Access**. The **Optimizing Access to the Org Charts** dialog box appears.

Be sure to read the details provided in the dialog box. You must select the option to indicate that you understand that once started, optimization must be run without interruption. After you click **Start**, GoldMine runs the optimization process.

WARNING: Depending on the size of your database, optimizing GoldMine for Org Chart access can take a long time. However, once started, the optimization process cannot be interrupted or data may be damaged or lost.

Combining Records of Organization Members

If you use GoldMine Corporate Edition with an E-license and SQL Server and have optimized GoldMine for Org Chart access, you can use the Org Chart's roll up feature to combine organization members' records in the tab bar of one record.

You can then easily view records stored for all members of an organization or section under the **Contacts, Details, Referrals, Pending, History, Links, Members, Tracks, Opptys, and Projects** tabs.

When you activate roll up on the top-level organization, GoldMine displays all records stored under the tabs listed above that are linked to contacts linked the organization.

To roll up activity records, select the organization or section in the Org Chart that you want to roll up and click the **Enable/Disable Org Chart's Roll up** button on the Org Chart toolbar. The **Org Chart Roll up Warning** dialog box appears. After you read and understand the warning, click **Yes** to proceed.

If you activate roll up for a selected section of an organization, GoldMine lists pending activities only for the contacts linked to the selected section (and any subsections).

Note: While roll up is activated, GoldMine disables filter commands for the Pending and History tabs in the Contact Record.

GoldMine disables roll up when you do any of the following:

- Select a contact link within the organization.
- Activate Org Chart/Section command within the Org Chart.
- Move to a curtained record.

Tip:

Activating roll up affects some local menu commands. GoldMine disables Options>> Filter commands for the History and Pending tabs. The Options>>Analyze command in the History tab's local menu works on only the currently selected contact.



in this chapter...

- Understanding Filters and Groups
- Working with Filters
- Working with Groups
- Tagging Contact Records

CHAPTER SIX

6

Working with Subsets of Contacts

Overview

At times, you may need to work with selected Contact Records in your database. The Contact Record selection can be based on different types of criteria, including city, last contact date, a specific detail value, or the value in a specified field.

GoldMine provides three methods for managing data subsets: filters, groups, and tagging. You can use filters and groups to create permanent subsets for repeated use. Tagging is a quick way to temporarily create a subset. Each method differs in the way subsets are handled.

Understanding Filters and Groups

If you need to create a subset for longer-term use, it is recommended that you build a filter or group. Both options create subsets based on selected criteria, but differ in the way they handle these subsets.

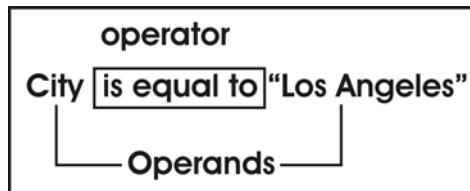
Filters

GoldMine's filters are based on Boolean expressions. Boolean expressions are logical statements that have one of two possible outcomes: true or false. Whenever you activate a filter, the entire database is evaluated based on the Boolean expression.

The Contact Records that match the Boolean expression are selected. The records that do not match are ignored by the filter. The following example shows how a filter selects records.

Example: For a specific project or campaign, you decide that you need to work with only your corporate clients located in Los Angeles. To do so, you create the following Boolean expression:

Contact1->City="Los Angeles"



A Boolean expression consists of two parts: operators and operands. Operands act as the data to be evaluated, while the operator determines the comparison method that determines whether the statement is true or false. In the example, the operands are City and Los Angeles and is equal to is the operator.

When this filter is activated, pressing PAGE UP and PAGE DOWN displays only those Contact Records in the database that are evaluated as true for this statement. The filter evaluates each Contact Record. If the record does not meet the condition(s) of the

statement, GoldMine continues to the next record and repeats the process to find a Contact Record that does meet the conditions. GoldMine then selects the record. In effect, the filter shrinks your database to present a subset of only those contacts with addresses in Los Angeles.

By constructing simple Boolean expressions like the example above, or more complex ones that incorporate multiple operators and operands, you can build and maintain an unlimited number of filters to categorize the records in your database.

Groups

A group is a fixed set of records that meets a specified set of conditions. A group allows instantaneous access to member records.

Each GoldMine user can create an unlimited number of groups, and each group can contain an unlimited number of members. The only limitation is the space available on your hard disk.

How Does a Group Differ from a Filter?

Working with groups can be more efficient than applying a filter. Each time that you activate a filter, GoldMine searches through the entire database for Contact Records that meet the criteria.

However, once a group is created, membership is fixed and you can work with the group members without performing the search again.

Each member Contact Record remains in the group until removed. However, since each record is evaluated every time the filter is activated, a selected filter automatically displays any new Contact Records added to the database if they match the filter's criteria.

Groups also have optional sort capabilities, allowing you to list member records in the order that best fits your needs.

Working with Filters

If you can think of the category of contacts that you need to use, you can easily create a filter to retrieve those records.

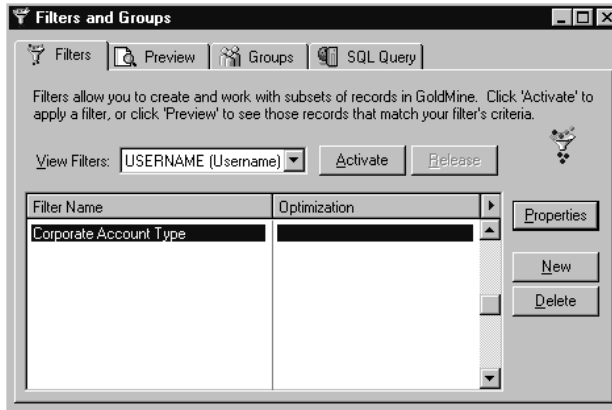
Using GoldMine, you can work in plain English to create a filter expression that you can apply to your database as-is or modify to meet special needs.

You can access, create, activate, and release filters from both the Contact Search Center and the Filters and Groups dialog box. See Chapter 4 for a discussion on using filters in the Contact Search Center.

The following sections provide general information for using filters in the **Filters and Groups** dialog box. For step-by-step instructions to build filters, see the online Help.

Accessing Filters

Select **Lookup>>Filters**. The **Filters and Groups** dialog box appears.



Use the **View Filters** drop-down list to select a user name. Each filter associated with that user name is listed alphabetically by the **Filter Name** assigned when the filter was created. You can **Activate**, **Release**, **Delete**, or create a **New** filter.

Creating Filters

GoldMine simplifies working with filter expressions by dividing the process into three tabs that let you work through the process step-by-step. From the **Filters** tab in the **Filters and Groups** dialog box, select **New**.

Using the **New Filter** dialog box, you can begin to build the filter using the following tabs:

- **Properties:** Name the filter, determine ownership, and select language. Also, use this tab to edit an existing filter expression.
- **Build:** Select the operands and operator for a simple filter expression or join conditions together to create more complex filter expressions.
- **Optimize:** Define a limit to further refine selection criteria for the filter (optional).

Tip:

For step-by-step instructions to build filters, see the online Help.

Selecting the Filter Language

You must choose an expression language for the filter. Select one of the following languages from either the **Properties** tab or the **Build** tab:

- **Show in English:** Displays the filter expression in English. For example, if the filter expression is set up to select records of contacts located in California, the entry in **Filter Expression** appears as **State is Equal to "CA"**.
- **Show in dBASE:** Displays the filter expression as a dBASE expression. For example, if the filter expression is set up to select records of contacts located in California, the entry in **Filter Expression** appears as **upper(contact1->state)= "CA"**.
- **SQL Query:** Displays the filter expression as an SQL expression. For example, if the filter expression is set up to select records of contacts located in California, the entry in **Filter Expression** appears as **c1.U_STATE = 'CA'**.

Counting Records Retrieved by a Filter

You can check the number of records that meet the conditions of the selected filter.

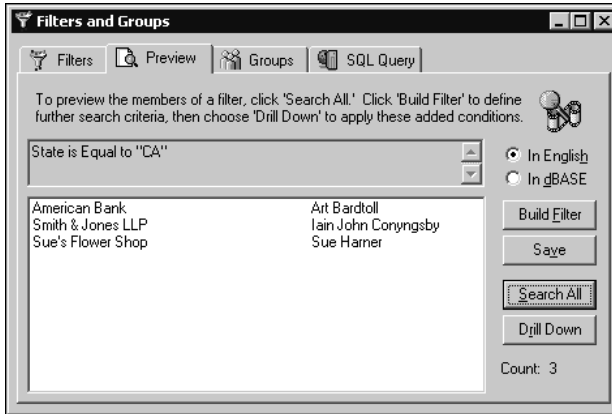
On the **Filters** tab of the Filters and Groups window, select the filter for which you want to run a count. Right-click and then select **Count**.

GoldMine counts the matching records and displays the **Counting Filtered Records** dialog box with results:

- Number of records that match the selected filter conditions.
- Name of the last company included.

Previewing a Filter

Before you save or activate the filter, preview the records that match the selected filter. In the **Filters and Groups** dialog box, click the **Preview** tab.



You can select the type of display for the filter from **In English** or **In dBASE**.

Click **Search All** to search the currently open contact database for records that match the filter conditions. GoldMine displays a list of records and the total **Count** of records. You can then select one of the following options:

- **Build Filter:** Allows you to edit the filter expression.
- **Drill Down:** Allows you to add conditions to further refine the filter. Use the **Drill Down** button if the filter retrieves more records than you want. When you drill down, GoldMine runs the subsequent search on only the records already selected. For example, if GoldMine retrieves 200 records on the basis of the originally applied filter, you can apply another filter to only those 200 records.

Saving the Filter

When you are satisfied by the number and type of records retrieved by the filter, you can save the filter for future use. On the **Preview** tab, click **Save**.

Activating a Filter

After you finish building a filter, it must be activated before it can be used in an operation.

From the **Filters** tab of the Filters and Groups dialog, click **Activate**.

While the filter is activated, the name of the filter appears in the title bar of the displayed Contact Record. GoldMine always applies the filter to the active Contact Record.

In most cases, the active Contact Record is the record that was in use before the filter was activated. If several Contact Records are open in the work area, but none are active, GoldMine applies the filter to the last-used Contact Record.

When a filter is activated, all operations act on only those records that match the filter criteria. For example, running a mail merge with an activated filter generates letters only for the Contact Records that meet the filter criteria.

Note: Activating the filter does not change the currently displayed record even if the record does not match the filter (unless the filter has a limit). However, if you press PAGE UP or PAGE DOWN, GoldMine displays the next Contact Record that meets the filter criteria.

Activating a filter affects the following GoldMine operations:

- Page Up and Page Down and the corresponding menu commands, Next Record and Previous Record.
- Selecting records for mass mailings.
- Record deletion commands: Delete Old History of ALL Contact Records and Delete ALL Contact Records.

Tip:

You can locate and display a Contact Record that does not meet filter criteria after you activate a filter without releasing the filter. Use the Contact Search Center to retrieve the record. However, when you press PAGE DOWN to advance to the next record or press PAGE UP to return to a previous record, GoldMine displays the next Contact Record that meets the filter criteria. Also, you can select View>>New Contact Window to work in a window outside the activated filter.

- Global replace commands.
- Synchronize commands.
- Export Contact Records command.

Releasing a Filter

Once a filter has been activated, it must be released before actions again affect the entire database. From the **Filters** tab of the Filters and Groups dialog box, click **Release**.

Deleting Filters

You can delete your own filters or filters you are authorized to delete. From the **Filters** tab of the Filters and Groups dialog box, select the filter that you want to delete. Click **Delete**.

Working with Groups

A group is a fixed set of records that meet a specified set of conditions. Because the group exists in the database and is not searched against the database each time it is activated, access to the member records of a group is instantaneous.

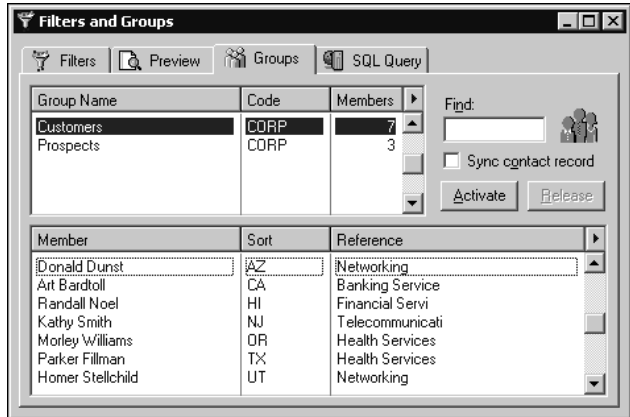
Each user can create an unlimited number of groups. Each group can contain an unlimited number of members. The only limitation is the space available on your hard disk.

You can access, create, activate, and release groups from both the Contact Search Center and the Filters and Groups dialog box. See "Groups" on page 4-7 for a discussion on using groups in the Contact Search Center. The following sections provide general information for using groups in the Filters and Groups dialog box. For step-by-step instructions to build groups, see the online Help.

Accessing Groups

Select **View>>Contact Groups**.

The **Groups** tab of the **Filters and Groups** dialog box appears.



The Groups tab contains two panes:

- The upper pane lists the groups “owned” by the user.
- The lower pane lists all the members of the group that is highlighted in the upper pane. GoldMine orders member records by the Sort code, which can be defined when you build the group.

Displaying the Groups of Another User

By default, GoldMine displays the groups you created. However, you can display groups created by other users.

In the Filters and Groups dialog box, right-click in the upper pane of the Groups tab to and then choose **Select User**. Select the user name in the drop-down list.

Groups can also be publicly owned and made accessible to everyone. Public groups are listed as **(Public)**.

Tip:

Some group-building methods are available only after you perform another operation. For details about working with the Group Building Wizard, see the online Help.

Adding Groups

GoldMine makes it easy to create groups.

- **Create a new group:** Assigns ownership and defines new criteria for selecting members. Uses the Group Building Wizard.
- **Clone and modify an existing group:** Uses a selected group as the basis for a new group; you can then modify specific conditions by editing the group profile or rebuilding the cloned group.

Creating Groups Using the Wizard

You can create a group based on newly defined criteria. From the **Groups** tab of the Filters and Groups dialog box, right-click in the **Groups** pane and then select **New**.

The **Group Profile** dialog box appears. Since you want to create a group with members, select **Build the group**.

The **Group Building Wizard** appears.



Using the Group Building Wizard, you can select one of the following methods to build your group:

- **Filtered records**
- **Previewed records**
- **SQL Query records**
- **Scheduled calendar activities**
- **Completed history activities**
- **Supplemental contact data**
- **Tagged records**
- **Search result**

Cloning Groups

You can create a group by cloning record selection and sorting options defined for an existing group. Cloning is a fast way to start a new group based on an existing group.

After you clone the group, you can change specific settings by editing the group profile or rebuilding the cloned group.

In the Groups tab of the Filters and Groups dialog box, select the group that you want to clone. Right-click and then select **Clone**.

Activating a Group

After you finish building a group it must be activated before it can be used in an operation (such as globally replacing data in a member's record).

To activate a group, display the Groups tab of the Filters and Groups dialog box, and then click **Activate**.

When you activate a group, GoldMine's database appears to contain only Contact Records that are members of the group. While the group is activated, the name of the group appears in the title bar of displayed Contact Records.

Once you have activated a group, you can use the Contact Search Center to locate and display a Contact Record that is not a group member.

Tip:

You can also activate a group by right-clicking to access a Group local menu and selecting Activate Group.

However, when you select the Next Record (Page Down) or Previous Record (Page Up), GoldMine displays the next Contact Record that is a group member.

Releasing a Group

Once a filter has been activated, it must be released before operations affect the entire database again.

From the Groups tab of the Filters and Groups dialog box, click **Release**.

Deleting Groups

You can delete your own filters and other filters you are authorized to delete.

From the Groups tab of the Filters and Groups dialog box, select the group in the Groups pane that you want to delete. Click **Delete**.

Tagging Contact Records

Tagging Contact Records is a quick way to create a temporary group of contacts for use during your current session. You can tag or select multiple Contact Records from the Contact Search Center or the Activity List.

To tag records, perform one of the following:

- Press and hold **CTRL**, and then click each record.
- Press and hold **SHIFT**, and then click on the first and last records of a block.
- Press and hold **SHIFT**, and press the down arrow and up arrow to move to the record that you want to select and then press the spacebar.

GoldMine notes the total number of tagged records in the title bar of each selected record.

Working with Tagged Records

After you tag records, GoldMine displays only those records as you work in the database. You can perform any standard merge operation on tagged records, including printing, sending e-mail and fax messages, and scheduling.

Removing Tags from Records

You can remove a tag from a single Contact Record or all records:

- **Single record:** Repeat the same steps by which you tagged the record in the Contact Search Center or Activity List.
- **All records:** You can remove all tags during your work session by closing the Contact Search Center or Activity List. GoldMine automatically removes all tags when you exit the application.

Saving Tagged Records as a Group

You may want to save tagged records as a group. Select **Lookup>>Filters>>Groups**. Create a new group and use the tagged records as your selection method.

in this chapter...

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Types of Activities
Scheduling Activities, Literature
Requests, Forecasted Sales,
To-Dos, GoldMine E-mail
Messages, and Activities
Received from Other Contacts
Viewing Scheduled Activities
Importing and Exporting iCalendar Files
Sharing Free/Busy Times
Additional Tools to Manage
Activities

CHAPTER SEVEN

Scheduling Activities

Overview

You can use GoldMine to schedule activities with contacts and other members of your organization. Activity information is time-specific or event-based data about either:

- Contacts, such as calls or appointments.
- Other types of activities, such as routine tasks, including mailings and faxes.

GoldMine's powerful scheduling features help you to organize and maintain activities for you and other members of your organization. You can manage your entire schedule with GoldMine. Schedule activities on a specific date with one of your contacts. Keep a running to-do list of duties and errands. If your plans change after you originally schedule the activity, you can easily modify the activity information.

Benefits of Using Activities

Consistently scheduling activities with GoldMine yields many benefits, including the capability to:

- **Track pending activities:** GoldMine can display various listings of activities that need to be performed. You have a great deal of control over the scope of these listings; they can be daily, weekly, or monthly. View all activities pending for a particular contact or view only those calls that must be made on a specific day. You can also view the pending activities of other users.
- **Set up reminders:** Automatically remind yourself to perform important activities. Alarms can be set for all activities GoldMine supports.
- **Record an electronic paper trail:** When activities are completed, GoldMine maintains a record of what was done, when it was done, and by whom—providing extremely powerful information for subsequent follow-up with contacts.
- **Schedule meetings:** When all of your activities are scheduled in GoldMine, other GoldMine users (for example, your assistant) can quickly and easily determine the times when you are available for meetings, conference calls, or appointments.
- **Delegate:** You can use the Calendar to assign scheduled activities to others and track their progress. One of GoldMine's most unique features is its ability to delegate and track activities for an individual GoldMine user, or a group of users.

- **Link activities with your contacts:** You can create both linked activities and unlinked activities. Linked activities are associated with a specific Contact Record. By default, created activities are linked to the active Contact Record. GoldMine updates the information on a linked Contact Record to show the progress of these activities. When you are scheduling an activity but do not want it linked to a contact, clearing the **Link to selected contact** option removes the active contact's name from the Contact field.

Unlinked activities are not connected to any contact and are generally used for incidental events. We recommend use of unlinked activities be limited, since many of GoldMine's features will not operate when the activity is not linked to a Contact Record.

Types of Activities

Nine types of activities can be scheduled:

Calls

An outgoing telephone call planned to be made in the future, an unscheduled outgoing call, or an unscheduled incoming call.

Next Action

A manual task, such as delivering samples or shipping products.

Appointment

Meeting with contacts or coworkers; scheduled conference calls.

Literature Request

Fulfillment and shipping of brochures, price lists, and other types of mass-printed documentation to one or more contacts.

Forecasted Sale

Anticipated sale of a product or service to a contact. GoldMine provides special features for managing forecasted sales.



For details on scheduling a forecasted sale, see Chapter 9, "Managing Sales."

Other Action

Miscellaneous activity that falls outside the other activity categories defined in GoldMine.

Event

Activity scheduled for one entire day or over several days, such as conferences and conventions.

To-do

Activity ranked by priority instead of scheduled by date. Each To-do activity is forwarded daily.

GoldMine E-mail

Queues e-mail messages to be sent to a contact.

Scheduling Activities

Activities are time-specific or event-based actions linked to contacts — such as calls, appointments, letters, and to-do tasks.

Scheduled activities are primarily linked to contacts. The link allows you to schedule the activity on your calendar and on the contact's **Pending** tab.

Then, when you complete the activity, it is moved to the contact's **History** tab, creating a record of communication and activity.

GoldMine's powerful scheduling features help you to set up and track activities for an individual user or a group of users. All users can schedule activities for themselves.

You can use the Calendar to schedule activities to others and to follow up on their progress.

Where to Schedule an Activity

You can schedule activities from various parts of the GoldMine application:

- **Schedule Menu:** Select a Contact Record for an activity. From the Main Menu, select **Schedule** plus the specific activity that you want to schedule. For example, to schedule an appointment, select **Schedule>>Appointment**.
- **Contact Record Pending Tab:** Click the **Pending** tab. Right-click and then select **Schedule** plus the specific activity that you want to schedule.
- **Calendar:** Right-click and then select **Schedule** plus the specific activity that you want to schedule.
- **Contact Search Center:** Select a contact and drag the contact to the Calendar date and time. By default, this schedules an appointment. To change the activity from the **Schedule an Appointment** dialog box; select a different activity in the **Activity** drop-down list in the Options area.

Tip:

See the online Help for detailed scheduling options.

Tip:

GoldMine can also schedule an activity from a Meeting Request you receive via e-mail. For details, see "Scheduling Activities Received from Other Contacts" on page 7-13.

How to Schedule an Activity

The procedure to schedule an activity is similar for five of the activity types — **Calls, Next Actions, Appointments, Other Actions, and Events**.

Schedule these activities by selecting from settings and features available from the six tabs — **Detail, Users, Resources, Available Time, Recurring, and Filter/Group**.

The remaining four activities — **Literature Request, Forecasted Sale, To-do, and GoldMine E-mail** — are scheduled using activity specific dialog boxes.

Toward the end of this chapter, the remaining activities are discussed.

Detail Tab

To schedule a call, next action, appointment, other action or event, select **Schedule** and then the appropriate activity. In the following sections scheduling an appointment was used as the example.

The screenshot shows the 'Schedule an Appointment' dialog box with the following details:

- Detail Tab:**
 - Contact:** Lauren Hall
 - Reference:** Face-to-Face to Address Issues
 - Notes:** Meet with client to resolve pricing issues.
- Options:**
 - Activity:** Appt.
 - Code:** GDW
 - Opportunity / Project:** [none]
 - Color:** [Black]
 - Mark as Private:** ☐
 - Link to selected contact:** ☒
- Primary User:** MASTER (MASTER)
- Time:**
 - Date:** 9/28/2004
 - Time:** 12:00 pm
 - Duration:** 1 Hr
 - Alarm:** ☐
 - On:** [empty]
- Actions:**
 - ☒ Notify via E-mail
 - ☒ Auto-generate RSVP
 - ☒ Send a request with the Appt. to
 - Contact(s):** [empty]
- Buttons:** Schedule, Cancel

The **Detail** tab uses the active contact, a new contact, additional contacts or users, create a reference regarding the appointment, and add any necessary notes.

Continuing with the configuration for the appointment, you determine how it is displayed in your calendar and whether it is linked to an opportunity or project.

As you schedule the appointment, you can assign it to another GoldMine user and then select the specific date, time and duration, and send an alarm to the scheduled user.

You can also send an e-mail notification and RSVP requests to users and contacts participating in the appointment.

User Tab

You can add other users or user groups to the distribution list of an activity. All selected participants must be created as a user record in GoldMine, even if they will never use any of GoldMine's other features or ever log into GoldMine.

You can assign the activity to a different **Primary User** and add users and user groups to the Selected Users list. Once you have created and selected a users list, you can delegate activities, send blind e-mail messages to a selected group of users and send delegation notices to users and contacts.

Resources Tab

In GoldMine, a resource is any equipment, facilities, or other items that can be used to support a meeting or other activity. Before you can reserve a resource, such as a conference room, the resource must be added to the Resources' Master File that maintains the list of items that can be shared among GoldMine's users.

Tip:

For details on creating resources, see the online Help.

Available Time Tab

After selecting the participants for an activity, you can look for a date and time open to all individuals, as well as the availability of any needed resources. GoldMine displays the available times. After you select the activity time, GoldMine schedules the meeting and informs the participants selected in the **Users** tab.

Recurring Tab

You can schedule recurring activities based on any interval of time. For example, you can schedule a weekly sales meeting for the next three months or you can schedule an appointment on the same day each week over the next twelve weeks.

Use recurring activities to schedule follow-up calls or any type of repeating tasks. Recurring activities can contain the same information as a nonrecurring activity, including alarms and notes.

The specific intervals, daily, weekly, monthly, and yearly, all have individual settings, helping you refine the recurrence settings.

Important Considerations

- The Hourly scheduling option is not available when scheduling forecasted sales.
- Settings defined in the **Advanced Recurrence** dialog box override settings defined in the **Recurring** tab of the **Schedule** dialog box. For example, if the Fixed Frequency is defined as Daily in the Recurring tab, yet you select Monthly in the Advanced Recurrence dialog box, the Monthly selection from the Advanced Recurrence dialog box overrides the Daily selection in Recurring tab.

- GoldMine and Microsoft Outlook do not recognize recurring activities when created in the other application. For example, if a user schedules a recurring activity in Outlook, then synchronizes to GoldMine, GoldMine creates each activity but does not “link” them as instances of a series.

If a GoldMine user changes or deletes one instance of the series, GoldMine does not prompt the user to change all members of the recurring activity.

The same response occurs in Outlook for recurring activities originally scheduled in GoldMine.

Selecting Advanced Options for Recurring Activities

GoldMine provides an expanded set of controls to schedule recurring activities, including forecasted sales. Similar to previous versions of GoldMine, you can define basic settings for a recurring activity in the **Recurring** tab in the **Schedule** dialog box; however, you can select the new **More** button to work with the options available in the **Advanced Recurrence** dialog box.

IMPORTANT: For GoldMine to schedule meetings successfully, all potential attendees must maintain their daily schedules in GoldMine. GoldMine can only determine available blocks of time based on users' schedule.

The **Advanced Recurrence** dialog box contains options to repeat an activity in time or date increments from hourly to annually. Once you select an hour or date increment, you can select corresponding options sensitive to the frequency with which the activity is scheduled to occur.

Editing Recurring Activities

Edit recurring activities from the individual activity record. When you close the updated record, you are prompted to apply the changes individually or globally to the series. You can make global changes to all activities in a series except for the **Start Date**.

If a series of meetings was scheduled for Mondays, you could reschedule one meeting to Tuesday. The remaining meetings would remain scheduled on Mondays.

When editing the date or time setting(s) in recurring activities, GoldMine only update(s) the currently open activity record.

To change the date throughout a series of recurring activities, you must delete all of the records generated by the original scheduling, then schedule the recurring activity again. This requirement applies to repeating activities scheduled from the **Recurring** tab or the **Advanced Recurrence** dialog box.

From the **Pending** tab of the Contact Record, right-click on the activity record that you want to update and then select **Edit**. The activity record appears.

Deleting Recurring Activities

You can delete one instance of a recurring activity or the entire series.

From the **Pending** tab of the Contact Record, select one of the activity records generated by scheduling the recurring activity. Press **Delete**.

Two prompts appear. The first prompt asks if you want to delete the selected activity. The second prompt asks if you want to delete all associated activities.

Filter/Group Tab

As noted, the procedure to schedule an activity is similar for five of the activity types – **Calls**, **Next Actions**, **Appointments**, **Other Actions**, and **Events**. Each of these is scheduled using the settings and features available from the six tabs. The final tab, **Filter/Group**, allows you to schedule an activity for any number of contacts.

Use this group scheduling feature to save yourself from the time-consuming chore of setting up each call separately. For example, you can schedule calls for each contact imported from a new mailing list.

You can also set the time of the first and last call and the number of calls to be scheduled per day within the specified time period.

GoldMine creates a Calendar activity for each Contact Record in the database and will automatically schedule the date and time for each call.

In addition, use filters and groups to schedule multiple activities for multiple GoldMine users. When multiple users are selected, GoldMine schedules activities in a round-robin fashion, scheduling one activity for each selected user, then changing the date and time by increments as necessary.

Scheduling Literature Requests

Scheduling a Literature Fulfillment request and using the Literature Fulfillment Center, you can easily send brochures, price lists, and any other publications to your contacts. The Literature Fulfillment Center stores and processes literature requests in one easy-to-view and manage location. You can even add new publications to a list for other users to select for their contacts.

The literature options must be configured in the Literature Fulfillment Center before you can add them as a scheduled activity.

Select **Schedule>>Literature Request** to schedule a literature request.

Tip:

Instructions for configuring the Literature Fulfillment Center and scheduling a Literature Request can be obtained from the online Help.

Tip:

Instructions for scheduling a forecasted sale can be obtained from the online Help.

Scheduling Forecasted Sales

A forecasted sale is an estimate that allows you to record the anticipated close date of a pending sale with one of your contacts. Forecasted sales are different from other activities because they include a product or service, an anticipated sale amount, and the probability of the sale closing.

To schedule a forecasted sale, select **Schedule>>Forecasted Sale**.

Scheduling To-Dos

You can track activities without a specific deadline in a to-do list. Schedule to-do activities to rank-order tasks by priority instead of placing the activities on specific dates.

GoldMine displays these activities in a separate area of the Day tab or Week tab in the Calendar.

Select **Schedule>>To-do**.

Scheduling GoldMine E-mail Messages

You can compose an e-mail and schedule it to be sent at a particular day and time.

Activate the appropriate contact, select **Schedule>>GoldMine E-mail**. The **Edit E-mail** dialog box appears.

Compose your e-mail and click the **Options** tab. Click **Queue, Calendar and History Options** button to specify a date and time for the e-mail to be sent. Click **OK**.

Click **Queue**. GoldMine adds the message to the e-mail queue. The **Pending** tab of the Contact Record shows the date and time.

Scheduling Activities Received from Other Contacts

Another feature of GoldMine is the capability to schedule an activity from a Meeting Request received from an e-mail sent from a contact. This feature works whether the sender created the activity in GoldMine or another iCalendar-enabled contact management application.

You can retrieve the Meeting Request just like any other Internet e-mail. Once you retrieve the Meeting Request, you can respond in a variety of ways. If you accept, GoldMine records the activity in your Calendar.

Retrieve the e-mail message from GoldMine's E-mail Center. You can indicate your response by selecting one of the following options:

- Accept
- Tentative
- Decline

You can accept the activity, propose a new time, or view your calendar so you can check your schedule before accepting.

Responding to a Meeting Request

When you **Accept**, **Decline**, or accept a Meeting Request on a **Tentative** basis, the **Meeting Request Reply** dialog box appears, allowing you to send a reply or not.

Requesting to Reschedule a Meeting

You can change the date and time scheduled in a Meeting Notice and then e-mail your request to the original sender. When you select **Propose new time** in response to a Meeting Request, the activity editing dialog box appears. Change the **Date** and **Time** fields as needed.

The **Send a Meeting Request** update to the contact check box should be selected to e-mail your changes to the original sender.

After you send your request, GoldMine updates your Calendar with the changed date and time. Depending on the options provided by the recipient's iCalendar-enabled software, the individual may have the same or similar options to Accept, Decline, or accept on a Tentative basis.

Canceling a Meeting Request

When you delete a pending activity for which you sent a Meeting Request to another contact, the **Delete Scheduled Activity** dialog box appears, allowing you to remove the activity from your calendar.

Viewing Scheduled Activities

You can view scheduled activities from any of the following displays:

- **Pending** tab of the Contact Record displays all activities scheduled for the contact.
- **Calendar** displays the same information as the Activity List in a graphical format.
- **Activity List** displays all or selected activities for a GoldMine user.

From the Pending Tab

You can view the activities associated with a single contact in the **Pending** tab of the contact's record. The **Pending** tab lists all upcoming activities scheduled by you and other GoldMine users for the primary contact or additional contacts associated with the Contact Record.

The screenshot shows a contact record for Lauren Hall. The top section contains contact details: Company (FrontRange Solutions Inc.), Contact (Lauren Hall), Dept (Sales), Title (CEO), Source (Internet), Last (Hall), Dear (Lauren), Asst (Jane), Phone1 (800)786-7889, Phone2 (800)709-3562, Phone3 (800)654-3526, FAX (719)536-0620, E-mail (suggestion@frontrange.com), Web Site (www.frontrange.com), Address (1150 Kelly Johnson Boulevard), City (Colorado Springs), State (CO), Zip (80920), Country, Merge, Contact Type (Internal), Territory (Comp. Slw. Dev.), Sales Rep (N/A), Interest (F. Darling), and Open. The bottom section shows a tabbed interface with the 'Pending' tab selected. The Pending tab displays a table of scheduled activities.

Activity	Date	Time	User	Code	Reference
Call	Feb 10, 03	10:00a	USERNAME (UserName)	SLS	Customer Service - Sale follow-up
Next Actn	Feb 10, 03	10:30a	USERNAME (UserName)	SLS	Send Info Package
Next Actn	Feb 18, 03	9:00a	USERNAME (UserName)	SLS	Update Forecast

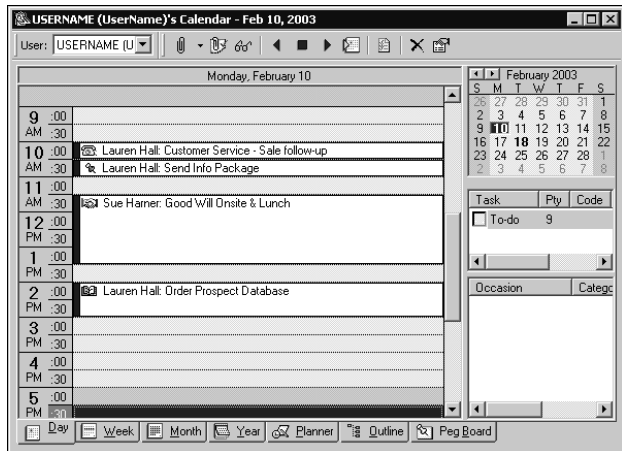
From the Calendar

GoldMine's **Calendar** graphically displays your scheduled activities. Using the Calendar, you can quickly determine available times for scheduling new activities.

For example, when you need to add a last-minute appointment, the Calendar can tell you when you, or other GoldMine users, have free time.

Using the Calendar, you can determine at a glance your availability for meetings and work. You can also schedule, edit, and complete activities from the Calendar.

Select **View>>Calendar**.



Viewing your To-Do List from the Calendar

You can view your to-do list in the **Day** tab or **Week** tab. The to-do list appears in the lower right area of the Calendar.

Viewing Activities of other Users

By default, GoldMine displays your activities in the Calendar. You can change the Calendar display to show the activities of one other GoldMine user.

From the **User** drop-down list, select the name of one user or select **(Multiple Users)** to display the **Select Users** dialog box, from which you can select users or user groups.

Viewing a Contact Record Linked to an Activity

You can display the Contact Record of the contact linked to an activity by double-clicking on the entry. GoldMine displays the linked record on top of the Calendar.

Scheduling and Viewing Occasions

In addition to major holidays, you can use Occasions to schedule and display important dates, either personal occasions or dates important to your contacts.

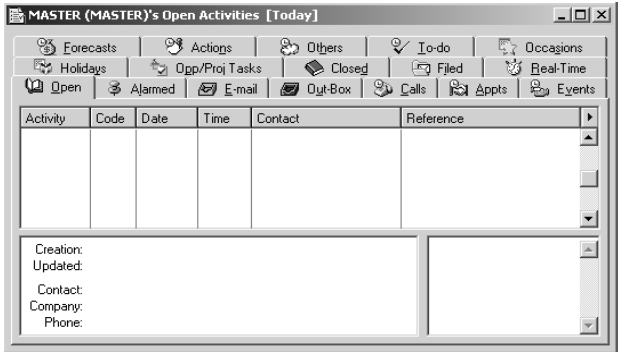
Occasions can be onetime or recurring events and are displayed in the Activity List and in the lower right corner of your calendar when you are using a daily or weekly calendar.

To add or edit an event, right-click in the **Occasion** pane of the Calendar, and select **New** or **Edit**. When the alarm for the occasion appears in GoldMine, click **Schedule** to schedule an activity against the occasion.

From the Activity List

Like GoldMine's Calendar, the **Activity List** displays activities that are linked to a particular GoldMine user. However, instead of presenting activities in a graphical format, the Activity List displays activities in categories by type and status. You can also display the Activity List to view another user's scheduled activities, completed activities, and e-mail.

Select **View>>Activity List**.



The Activity List categorizes information in the following tabs:

- **Open:** Lists pending activities.
- **E-mail:** Lists pending GoldMine and Internet e-mail.
- **Out-Box:** Lists Internet e-mail that have been created, but not yet sent.
- **Calls:** Lists pending scheduled calls.
- **Appts:** Lists pending scheduled appointments.
- **Events:** Displays pending events.
- **Forecast:** Lists pending sales.
- **Actions:** Lists pending next actions.
- **To-do:** Displays pending to-do activities.
- **Occasions:** Lists special dates for you and your contacts.
- **Holidays:** Lists holidays observed by your organization.
- **Closed:** Lists completed activities.
- **Filed:** Lists both GoldMine e-mail and Internet e-mail that have been sent.
- **Real-Time:** Lists completed activities as logged in real time.

Working with Listed Activities

The Activity List has several local menus, depending on which tab is active. You can right-click and view the details of an activity, display the Contact Record linked to an activity, use the auto-dialer to call the contact, complete the activity, or save vital reference information in the history file.

Viewing Activities of Other Users

By default, GoldMine displays your activities in the Activity List. You can change the **Activity List** display to show the activities of another GoldMine user.

Right-click and select **Options>>User**. On the **Select a User** dialog box, select another user from the **User Name** drop-down list.

Viewing a Contact Record Linked to an Activity

You can display the Contact Record linked to a selected activity record in the **Activity List** simply by double-clicking on the entry. GoldMine displays the linked record on top of the **Activity List**.

Auto-Updating Activities

Added to the **Activity List** and the **Pending** tab local menus is a menu option for auto-updating. You can now update a group of phone messages and GoldMine e-mail messages as completed or you can delete them all at the same time. Right-click in the relevant tabs and select **Options>>Auto-Update**.

You can also perform mass completion and deletion of Resource activities by selecting the **Auto-Update** button on the Resource(s) Activity List. Select **File>>Configure>>Resources>>View Schedule** and click the **Auto-Update** button.

Importing and Exporting iCalendar Files

GoldMine offers expanded iCalendar support for importing activities from iCalendar (.ics) files into GoldMine, as well as exporting scheduled activities as iCalendar files. Use the iCalendar import and export capabilities to share activities with users of other Calendar management applications, such as Microsoft Outlook.

Importing iCalendar Files

You can import iCalendar files exported from any iCalendar-capable program. Depending on the options you select, you can either:

- Schedule the activity directly to your Calendar.
- Display a Meeting Request enabling you to respond to the activity before placing on the Calendar.

To import an iCalendar file, select **Tools>>Import/Export Wizard>>Import from an iCalendar file**.

Navigate to the folder containing the iCalendar file(s) (.ics) and then select the file you want to import into GoldMine.

Note: When importing iCalendar files from Lotus Notes, GoldMine schedules activities without assigned participants, or “invitees,” as unlinked. You can identify this situation in the Import from an iCalendar file dialog box whenever the Organizer entry is UNKNOWN.

You can take one of the following actions on the iCalendar file:

- **Import:** Schedules a single iCalendar file activity directly to your Calendar.

Tip:

For details about responding to a Meeting Request, see the online Help.

- **Import All:** Schedules all activities contained in a multi-record iCalendar file directly to your Calendar.
- **Open:** Displays a Meeting Request for the single activity or for the first activity in a multi-record iCalendar file.

Note: The **Open** option is not available when importing “Published Event” activities.

If you select either Import command, you are finished. If you click **Open**, GoldMine displays a Meeting Request image where you can click the hyperlink corresponding to your response.

Exporting Activities as iCalendar Files

You can export scheduled activities as an iCalendar (.ics) file. Users of iCalendar-enabled applications, such as Microsoft Outlook or Lotus Notes, can then import activities from your iCalendar file to schedule to their calendars.

To export scheduled activities as an iCalendar file, select **Tools>>Import/Export Wizard>>Export to an iCalendar file**. You can select the source of records for export from activities based on contacts or users:

- **Activities based on the Contact(s):** Exports activities scheduled for the current Contact Record or for those records selected on the basis of a filter.
- **Activities based on the User(s):** Exports activities scheduled for selected user(s). Select one or more users from the list.

And you can export activities for the active Contact Record or a predefined filter or group:

- **Current contact record:** Exports activities from the currently active Contact Record.
- **Filter/Groups:** Exports activities for the contacts based on the selected filter or group.

You can export all or any activity types within a specified date range. Once you click **Export** you can give the iCalendar file a name and save in the default folder. Once you save the **GoldMine Process Monitor** appears to display the progress of the export.

Sharing Free/Busy Times

Scheduling becomes more dynamic and efficient when you and your contacts share free/busy times. GoldMine users can publish their free/busy time in an iCalendar recognized format, making it available to non-GoldMine users for easy scheduling.

For example, a contact with whom you work closely and who is an Outlook user can view the free times on your published GoldMine calendar when trying to schedule a meeting. This saves the time-consuming process of proposing and counter-proposing meeting times between participants.

Furthermore, GoldMine users can view a contact's published free/busy time in the GoldMine calendar when they are scheduling an activity. Once again, this provides efficient processing and seamless communication with contacts.

Publishing User's Free/Busy Time

Publishing your free/busy time requires you to configure the **Free/Busy** tab and then publish the information.

To configure your free/busy options, select **Edit>>Preferences>>Calendar tab>>More Options>>Free/Busy**.

To publish your free/busy information, select **Tools>>Publish Calendar>>Publish Free/Busy Times**.

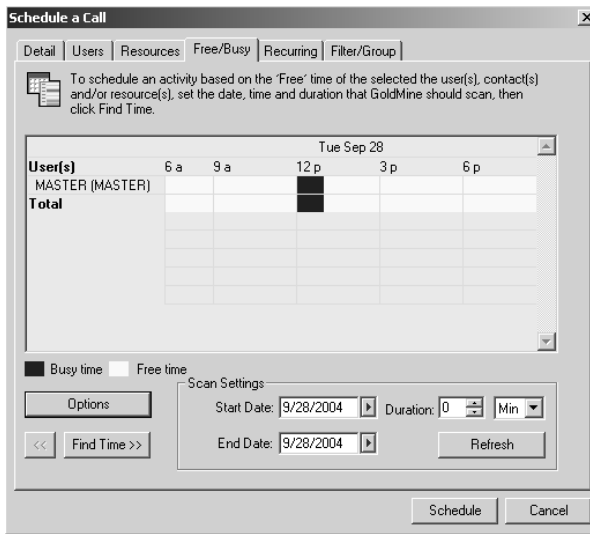
Using Contact's Free/Busy Time

When you are working with a contact who publishes his or her free/busy times, you configure the Contact Records to access the calendar data and then use the information when scheduling activities with the contact, quickly resolving any scheduling conflicts.

To configure the Contact Record, have the record active in GoldMine and then select **Edit>>Record Properties>>Contact Details>>Free/Busy** tab.

To use the information when planning, schedule an activity, and in the **Schedule an activity** dialog box

select the new **Free/Busy tab>>Options>>Show Contacts**. When you click **OK**, the contact's free/busy times appears on the tab.



Publishing User Calendars in iCalendar or HTML

Expanding upon the idea of sharing scheduling information, you also have the option to publish your entire calendar in an iCalendar or Hypertext Markup Language (HTML) format. Publishing the information makes your entire calendar available to you or others within your network or on the Internet.

To configure your iCalendar or HTML calendar, select **Edit>>Preferences>>Calendar>>Options>>Publishing**.

To begin publishing, you can use the Server Agents. Select **Tools>>Server Agents Administrator>>Calendar**. Configure the settings as needed and then start the Server Agents.

Additional Tools to Manage Activities

GoldMine provides a variety of useful tools to manage your activities. In addition to the features covered in this chapter, you can work with the operations listed below. To access these features, select the corresponding commands from GoldMine's Main Menu:

- Start GoldMine's timer to track the duration of any activity: Select **Edit>>Timer>>Start Timer**.
- Take a telephone message for a contact or another member of your organization: Select **Contact>>Take a Phone Message**.
- Work with other team members on a large project: Select **View>>Projects**.
- Automate routine tasks, such as scheduling sales calls or sending form letters: Select **Contact>>Assign a Process**.
- Add holidays to your Calendar: Select **Edit>>Preferences>>Calendar**. In the **Calendar** tab, click the **Holidays** button.

in this chapter...

- Completing Calls and Messages
- Completing Activities
- Editing Calls and Activities
- Analyzing Activities
- Additional Tools for Completing and Analyzing Activities

CHAPTER EIGHT

Completing and Analyzing Activities

Overview

Using GoldMine you can record any activity you complete whether scheduled or unscheduled. For example, if one of your contacts called you unexpectedly, you can record the conversation in the **History** tab even though a call was not scheduled.

When a scheduled activity is completed, the Calendar record is removed and a record posted to the linked contact's **History** tab to indicate what was accomplished. This is how GoldMine completes an activity. To make use of GoldMine's analysis features, all scheduled activities should be completed.

You can use GoldMine to analyze your own activities or the activities of a group, such as your sales team. GoldMine provides a set of analysis reports to provide GoldMine users and management with information about their performance.

Completing Calls and Messages

You can use GoldMine to complete a scheduled or unscheduled telephone call. You can even record a call you returned from a message left for you.

From the **Complete** menu, you can select one of the following:

- **Scheduled Call:** Allows you to complete a scheduled call.
- **Unscheduled Call:** Allows you to complete an unscheduled call.

Tip:

You can see each of these windows in "Viewing Scheduled Activities" on page 7-14.

Note: If you are completing a scheduled call, GoldMine displays all previously recorded entries.

Update the text boxes with the appropriate information. GoldMine defaults to a value of Successful in the **Success** drop-down list. Select another value if necessary.

Type details in the **Notes** area to add information about issues encountered or additional needs and interests that can affect your future relationship with the contact.

You can schedule a follow-up activity to plan the next necessary action with the contact.

Note: You can record a call you make in response to a message. Display the Contact Record of the caller who left a message for you. Select **Complete>>Message**. The **Complete a Returned Message** dialog box appears. Complete the call in the same way as a scheduled or unscheduled call.

Completing Activities

You can complete scheduled or unscheduled activities. You can complete a scheduled activity for a displayed contact by selecting **Complete>>Next Action**, by selecting the **Pending** tab of the contact's record, through the **Activity List**, or through your **Calendar**.

To display all activities scheduled for the active Contact Record (including activities scheduled for additional contacts), select **Complete>>Pending Activities**.

Using the **Complete Activity** dialog box, select the activity that you want to complete, then click **OK**. The **Complete a Next Action** dialog box appears from which you can complete the activity record.

To complete an unscheduled activity for the active contact, from the Main Menu select **Complete**, and then select the activity type you want to complete. For example, to complete an unexpected task, select **Complete>>Other Action**.

Alternately, select **Complete>>Pending Activities**. The lower portion of the **Complete Activity** dialog box displays a list of **Unscheduled Activity** types from which you can select the activity you want to complete.

GoldMine displays the same dialog box for you to complete a scheduled or unscheduled activity. You can also complete a to-do.

Completing Multiple Activities

You can simultaneously complete or delete activities using the Auto-Update feature. You can update activities for particular users or contacts. On the **Pending** tab or in the **Activity List**, right-click and select **Options>>Auto-Update**.

Tip:

You can configure your Calendar to display completed activities. Right-click to display the local menu, then select **Activities**; or click the **Select Activities** button. The **Select Activities to View** dialog box appears. In the **Completed Activities** column, select each activity type that you want to display.

Editing Calls and Activities

You can change values in a call or activity record while you complete the activity, and even after you complete the activity. From the Contact Record, Activity List, or Calendar, right-click on the activity record and select **Edit**.

You can change values as needed.

Analyzing Activities

GoldMine provides several analysis tools users can run to check their performance. GoldMine can calculate statistics based on activities scheduled and completed by the currently logged on user, all GoldMine users, or any selected GoldMine users.

You can use any of GoldMine's analysis and graphing tools to make calculations on the activities of one user or to calculate statistics for a group of users.

You can run most of the analyses from GoldMine's Main Menu. Select **View>>Analysis** and then select the specific analysis you want to run, such as **Statistical Analysis**. The only exception is the method for running Contact Record statistics. To run that analysis, you can right-click in the **History** tab of the Contact Record, and then select **Options>>Analyze**.

Types of Analysis Reports

You can run the following types of analyses on GoldMine data:

- **Contact Record statistics:** Lists information about activities scheduled and completed with the contact. These statistics can help to show the state of your relationship with the contact, such as the amount of time you are dedicating to the contact and the amount of sales generated by the contact.

- **Completed activities statistics:** Displays completed activity information of an individual user, a group of users, or on a system-wide basis. The analysis of completed activities can provide useful insight into your performance or the performance of others in your organization.
- **Forecasted sales statistics:** Provides a summary analysis of sales performance by one or more individuals or sales teams. This analysis displays actual numbers and percentage-of-goal figures for quotas, forecast sales, and closed sales for a specified period of time.
- **Graphical analysis of activities:** Generates summary graphs of user activity data based on a variety of criteria. You can display your data as a bar graph or a line graph. GoldMine can represent all activity for a defined period of time, or one of several defined types of activity. Graphs can also represent total activities, a comparison of all users, or selected users.
- **Leads statistics:** Calculates the profitability of individual marketing sources or groups of campaigns. GoldMine can report the total number of leads generated from each seminar, advertisement, or trade show (source), the total sales volume generated from each source value, and the potential sales pending from each source value. You can then easily identify the most effective lead sources in terms of total leads or total sales volume generated.
- **Quota statistics:** Shows the actual performance of individuals against assigned quotas for a specified period. This analysis uses data about the assigned quota, forecast sales, completed sales, and lost sales to derive either a percentage of quota, or a percentage of forecast sales attained by a salesperson. Because GoldMine analyzes data by period, a "track record" for each salesperson can be seen via listings over multiple periods.

Selecting Criteria for the Analysis

You can customize the analysis by setting the following criteria:

- Users or user groups to include in the analysis.
- Analysis Range to specify the beginning and ending dates.
- Activity and Result codes to limit the analysis to specific activity types.

After you select the criteria for the analysis, click **Analyze** to display the results. Click **Print** to generate an onscreen report, which you can then send to your printer, if desired.

Additional Tools for Completing and Analyzing Activities

GoldMine provides useful tools to record work completion and analyze activities. In addition to the features covered in this chapter, you can work with the operations listed below. To access these features, select the corresponding commands from GoldMine's Main Menu:

- To take a telephone message for another member of your organization, select **Contact>>Take a Phone Message**.
- To run one of GoldMine's analysis reports, select **File>>Print Reports**.

in this chapter...

- Understanding Sales
- Making Individual Sales
- Assigning Quotas
- Managing Sales Opportunities and Projects
- Working with Campaigns
- Additional Sales Tools

CHAPTER NINE

Managing Sales

Overview

Using GoldMine you can manage a wide range of sales from a simple transaction to a complex sale involving an entire sales team. By scheduling anticipated sales and then recording the outcomes, you can compare actual results to your expectations.

GoldMine provides tools to manage different types of sales activity, whether involving a single salesperson or an entire sales team. Managers can use GoldMine to assign quotas to sales team members and then analyze how each member meets the assigned quota. Managers can also use the Opportunity Manager to plan, track, and manage complex sales.

Understanding Sales

Tracking your pending and closed sales is a basic management technique for gauging your performance against your quota. A forecasted sale is an estimate you can use to record the anticipated close date of a pending sale with one of your contacts. GoldMine stores potential sales information in the same database where it stores information about contacts.

When you close the sale, GoldMine moves the record into the contact's **History** tab. Scheduling and completing a forecasted sale is similar to scheduling and completing other types of activities. However, forecasted sales differ from other activities because they involve a product or service, an anticipated sale amount, and the probability of closing the sale.

Sales differ in their level of effort and complexity. Some transactions involve one salesperson and one client for a relatively brief period, while others involve multiple components and require the coordinated efforts of a team over a relatively long sales cycle. Sales can be viewed on two levels:

- Individual sales are typically assigned to a single user and involve the sale of a product or service to a single contact. GoldMine provides tools to schedule, or forecast, an individual sale. In addition, the tools help managers to assign and analyze sales quotas.
- Complex sales involve multiple participants over a longer period and typically involve multiple components of products or services bundled as a package; therefore, individual sales can be planned, tracked, and recorded as part of a complex sale. In GoldMine, a complex sale is known as an opportunity.

GoldMine provides tools to work with both of these sales levels. Individuals or their managers can schedule and complete individual sales. Managers can assign quotas to sales team members for a period such as a quarter. The individual sales would then count toward meeting the quota. When a complex

sale requires coordinating the efforts of multiple team members, managers can use the Opportunity Manager to tie together all of the individuals and elements into a more manageable working unit.

This chapter discusses the tools GoldMine provides for you to manage, individual sales as well as complex sales.

Making Individual Sales

The procedure to schedule any activity in GoldMine is basically the same. Scheduling a forecasted sale requires information about the product or service to be sold, the anticipated sale amount, and the probability of closing the sale.

Scheduling Forecasted Sales

Select **Schedule>>Forecasted Sale**.

The **Schedule a Forecasted Sale** dialog box appears.

Schedule a Forecasted Sale

Details | Recuring

GoldMine allows you to strategically manage your revenue 'pipeline' with the ability to forecast sales instead of scheduling another call to remind yourself of a potential order.

Contact: Lauren Hall Opportunity / Project: (none) New

Product: Code: User: USERNAME (I)

Units: 1 Price: 0.00 Amount: 0 Probability: % Sale Date: 2/11/2003

Notes

Options: ☒ Link ☐ RSVP ☐ Alarm

OK Cancel

Tip:

As soon as you fill in the Units and Price, GoldMine automatically calculates the Amount.

The name of the active contact is automatically displayed in the **Contact** text box. You can select an additional contact in the drop-down list or search for a new contact using the Contact Search Center.

To make the forecasted sale a useful planning and tracking tool, add the product name, code, number of units, price per unit, probability of sale, and the expected sale date.

Note: GoldMine assigns a description to the stages (percentages) in the sales process. For example, **30** indicates Confirmed Interest. Click the adjacent arrow to display a list of associated descriptions.

In the **Notes** area, you can add detailed information about the sale.

You can also select one or more **Options** to help you track the progress of the sale. For example, you might want to activate the alarm to remind you about the sale on the scheduled closing sale date.

When assigning sales, managers can select the **RSVP** check box to track task delegation. GoldMine posts an RSVP message on the Activity List when the sale is completed by the assigned user. The RSVP record can provide information about the outcome of the sale.

Editing Entries

You might need to change the name of the contact if you planned to make the sale to the primary contact, but find you are actually interacting with an additional contact at the organization.

Although GoldMine automatically assigns the sale to the current user, you can reassign the sale to another user. Managers can use this feature to delegate or reassign sales.

You can add the forecasted sale to a sales Opportunity/Project, or create an opportunity on-the-fly and then add the sale. You can read more about sales opportunities in "Managing Sales Opportunities and Projects" on page 9-8.

Viewing Forecasted Sales

GoldMine provides three different ways to view your forecasted sales: the **Pending** tab of the Contact Record, the **Activity List**, or the **Calendar**.

Completing Sales

You can use GoldMine to complete a forecasted sale or an unscheduled sale. Recording the outcome of a sale is useful for tracking, analysis, and reporting.

To complete a sale, select **Complete>>Sale**.

The 'Complete a Sale' dialog box is shown with the following fields and values:

- Contact: Lauren Hall
- Sale Date: 2/11/2003
- User: USERNAME [Us] (Private checkbox is unchecked)
- Product: 503: Gadget C
- Opportunity / Project: (none)
- Code: DRM
- Result: (empty)
- Units: 100
- Price: 100.00
- Amount: 10,000
- Success: Closed Sale
- Notes: (empty text area)
- Schedule a Follow-up: (unchecked checkbox) Call (button)
- Buttons: OK, Cancel

Using the **Complete a Sale** dialog box, you can finish both a forecasted sale or an unscheduled sale.

You can complete any sale, whether successfully closed or not. The **Success** drop-down list defaults to **Closed Sale**. To record a different outcome, select a different value in the drop-down list.

Record detailed notes in the **Notes** area to help identify issues encountered during the sale or additional needs and interests that might lead to future sales. You can also schedule a follow-up activity ensuring you plan the next necessary action with the contact.

After you complete a sale, GoldMine changes the forecasted sales record into a history record. You can still view the record in the Contact Record, Activity List, or Calendar. GoldMine moves the record as follows:

- **Contact Record:** The sales record moves from the **Pending** tab to the **History** tab.
- **Activity List:** The sales record moves from the **Forecasts** tab to the **Closed** tab. You can also see the completed sales record in the **Real-Time** tab.
- **Calendar:** If you configure the Calendar to show completed forecasted sales, the sale record appears in the **Day** tab or the **Week** tab on the date completed.

Note: You can set up the Calendar to display completed activities of any type. Right-click in the **Calendar** and then click **Activities**. The **Select Activities to View** dialog box appears. Select **Forecasted Sales** (and any other Completed Activities that you want the Calendar to display), then click **OK**.

Analyzing Forecasted Sales

GoldMine can generate seven types of analyses to provide up-to-the-minute user activity data, including sales performance. You can run a sales analysis for one individual, multiple users, or sales teams. The sales analysis displays actual numbers and percentage-of-goal figures for quotas, forecast sales, and closed sales for a specified date range. Select **View>>Analysis>>Sales Analysis**.

GoldMine overlays the **Select Users** dialog box on the **Sales Analysis** dialog box so you can select the user(s) or user groups to be included in the analysis.

After you select the users, you can specify a date range in the **Sales Analysis Range** area for the analysis. In the **Activity Cd** and **Result Cd** text boxes you can limit an analysis to specific sales categories.

Note: To reflect an accurate quota amount, enter dates in the Sales Analysis Range corresponding to the quota periods defined in the Quota Profile.

Managing Sales Opportunities and Projects

The **Opportunity Manager** can record the involvement of multiple people working as a team with several organizations and contacts. The sale can involve multiple component products or services as a package deal. A customer might purchase some of the package and renegotiate the components into a different package.

A team working to complete a long-term project that involves multiple component tasks uses the **Project Manager**. Unlike an opportunity, a project is not sales focused. An unlimited number of projects or opportunities can be created for each salesperson.

Working with the Opportunity and Project Managers enhances your team's ability to manage accounts and projects. Some of the advantages of the Opportunity and Project Managers include:

- **Coordinated Display:** You can view all of the details of the opportunity/project at a glance and organize them by stage in the sales process, from the initial contact to closed sale.
- **Tracking Activities:** Any sales team member can view summary and detailed information about forecasted sales for the opportunity, as well as activities scheduled for contacts.
- **Reviewing History:** A complete record of all activities associated with the opportunity/project, including what was done, the date, and by whom, ensures a coordinated effort among sales team members.
- **Positioning:** Recording detailed information about individuals who influence decision-making, as well as about your competition, gives you information about your relative position so you can adjust your strategy to best promote your strengths.

- **Associating Contacts:** Links or associates contacts with a specific opportunity or project. GoldMine updates information on the linked Contact Record to show the progress of activities involved with the opportunity.
- **Using Templates:** Easily create an opportunity template to save time by automatically generating entries that would routinely be entered in every new opportunity/project record.

The following sections describe accessing each Manager display and briefly introduces the operations available to manage opportunities and projects. For more details about working with the Opportunity Manager or Project Manager, see the online Help.

The Opportunity/Project Manager also offers individual wizards to assist you in creating an opportunity or a project. Whenever you create a new opportunity or project, you have the option to use the wizard. The wizard is extremely useful, helping you create consistent content for the opportunity or project.

Working with the Opportunity Manager

Select **View>>Sales Tools>>Opportunities**.

Using the Opportunity Manager window, you can manage opportunities using summary and detailed information about opportunities and projects.

The upper pane of the Opportunity Manager displays summary information about the selected opportunity or project, including:

- **Opportunity:** Name given to the opportunity, such as GoldMine sale or Aerospace contract.
- **Company:** Name of the company that is the primary customer target for the opportunity.
- **Stage:** Displays information related to the level, or phase, of the opportunity.

Tip:

You can create an opportunity manually, or you can use the new Opportunity Wizard to create an opportunity. For details about the Opportunity Wizard, see the online Help.

Tip:

To sort opportunities or projects in alphanumeric order by one of the column criteria, click on the column label. For example, if you want to list records in alphabetical order by company name, click the Company label.

- **Code:** Three-letter code categorizing the opportunity.
- **Revenue:** Actual amount of dollars generated at the close of any components of the opportunity.
- **Close Date:** Actual completion date of the opportunity.
- **Prob%:** Likelihood of the opportunity being concluded successfully expressed as a percentage.
- **Age:** Number of days since the opportunity was created. If the **Age** column is not visible, either move the horizontal scroll box at the bottom of the browse window, or drag out the right border of the **Opportunity Manager** window.
- **Manager:** User name of the individual assigned to manage the opportunity.
- **Status:** Phase or position in the opportunity.

In the lower pane you use the **Opportunity** tabs to add, track, or edit information about participants and activities involved in the opportunity.

The tabs include:

- **Influencers:** In an opportunity, the individuals who affect or participate in the decision-making process are known as influencers. To succeed, you must have key information about each of these influential contacts.
- **Prods/Svcs:** Individual sales linked to the opportunity are stored in this tab. Use local menu commands to edit or complete the sale. You can also add other sales, or schedule other activities from this tab.
- **Tasks:** Each large-scale opportunity involves multiple tasks starting and ending over differing periods of time. Some tasks might require team effort at the same time, while others may overlap in time or occur at different times. One task might need to be completed before work on another task can begin. In a complex sale or project, tracking tasks is critical to effective management and successful completion of the opportunity.

- **Team:** You can keep a team membership list of both users (internal) and contacts (external). You can record key data about each member assigned to the opportunity, such as name, title, and role in the opportunity.
- **Issues:** Each opportunity has problems, or issues, the target company needs to resolve. You can record and track issues to better manage the opportunity.
- **Notes:** Records details about the opportunity in addition to the information provided in the other tabs. You can type notes directly in the tab, or you can add notes in the **Notes** tab of the **Opportunity/Project Properties** dialog box.
- **Competitors:** To successfully present your organization and products, you must typically position them among a field of competitors. You can better focus your efforts by becoming more knowledgeable about the competition for a specific opportunity. Key information would include the specific products or services competing with your product or service, as well as more subjective information such as the strengths and weaknesses of the competing product or company.
- **Details/Links:** You can add custom fields to track specific detailed information for the opportunity. This entry appears in the **Details** tab's **Item** column. Similar to working with the **Details** tab in a Contact Record, you can define an unlimited number of detail records to store data specific to your field or industry. You can link a file to a detail record, such as a document or spreadsheet.
- **Pending:** A large-scale opportunity or project typically involves many related activities performed by different team members. This tab displays scheduled activities linked to the opportunity. You can use local menu commands to edit or complete an activity. You can also schedule other activities from this tab.

- **History:** When any kind of activity related to the opportunity, whether scheduled or unscheduled, is completed, a record of the completed activity appears in the **History** tab.

Working with the Project Manager

Select **View>>Projects**.

Using the Project Manager, you can use the Project Manager to track the multiple participants, activities, issues, and other items involved in completing the project. You can add team members, schedule component activities linked to contacts, and track the success or failure of each activity.

The Project Manager organizes information into tabs appearing in the lower portion of the window.

If necessary, you can convert the project into an opportunity if sales become part of the project. Click the **Project Manager** toolbar's **Convert** button.



The Project Manager tabs are similar to the tabs in the Opportunity Manager. See "Working with the Opportunity Manager" on page 9-9 for details about the tabs.

Editing Basic Information for an Opportunity or Project

As the opportunity or project progresses, you may need to change or update information. Select the entry in the Opportunity/Project Manager, right-click and then select **Edit**.

- If you are working with an opportunity, GoldMine displays the **Opportunity Properties** window from which you can make changes to the record.
- If you are working with a project, GoldMine displays the **Project Properties** window that is similar to the **Opportunity Properties** window.

You can change basic entries in the **Info** tab and edit **Notes** for the opportunity or project.

Completing Opportunities

When closing an opportunity, GoldMine requires you indicate the outcome of the opportunity. After you close an opportunity, you cannot later reopen the opportunity or convert the closed opportunity into a project. You must have the necessary authorization to complete each activity.

Note: The requirement to indicate outcome applies only to completing opportunities, not to projects. The Opportunity Manager local menu provides Win and Lose commands. The Project Manager local menu provides a Complete command.

To close an opportunity as a win or loss, select an opportunity, then click **Win** or **Lose** on the toolbar. When the Opportunity Closing Prompt appears, click **Yes**.

The **Opportunity Properties** dialog box appears.

The screenshot shows the 'Opportunity Properties' dialog box with the 'Info' tab selected. The dialog box contains the following fields and controls:

- Opportunity:** Text box containing 'Big Sale'.
- Company:** Text box containing 'JHill Millinery'.
- Manager:** Dropdown menu showing 'UserName (USERNAME)'.
- Code:** Text box with a dropdown arrow.
- Status:** Text box containing 'Won'.
- Source:** Text box containing 'Cust Referral'.
- Units:** Text box containing '10'.
- Price:** Text box containing '0.00'.
- Probability:** Text box containing '100' followed by a '%' symbol.
- Forecast:** Text box containing '0'.
- Closed Amt:** Text box containing '10,000.00'.
- Start Date:** Text box containing '10/8/2002'.
- Close by:** Text box containing '12/9/2002'.
- Actual Close:** Text box containing '11/8/2002'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

At the top of the dialog box, there is a message: 'GoldMine allows you to track detailed information about the account manager(s), status, source, forecast and timeframe of any opportunity. Please enter the summary below.'

Use the **Info** tab to record the relevant closing information.

Click the **Wrap Up** tab. Options are available here to complete records linked to the opportunity.

For a win or loss, type an explanation in the **Win/Lose Reason** text box or select from the F2 Lookup.

If the opportunity is a loss, select the winner of the contract in the **Competitor Contract Winner** drop-down list. Your choices include:

- **(none)** indicates no company has won.
- **(New)** displays the **Competitor** dialog box where you can complete the applicable information for creating a new competitor.
- A competitor as listed on the **Competitors** tab for the opportunity.

Select the records to complete with the opportunity from the following options:

- **All incomplete tasks** to complete records left in the **Tasks** tab, and *crosses off* those items in the Gantt chart.
- **All scheduled (pending) activities** to complete activities listed under the **Pending** tab. Complete activities by specifying an activity Code or to complete all activities, leave **Code** blank. You can also specify a **Result** code to be recorded with all of the remaining activities.
- **All open issues with Status** to complete records listed in the **Issues** tab with the specified status.

Deleting Records from an Opportunity or Project

You have a variety of options for selectively or globally deleting contact-related information from an opportunity or project. You might want to remove an old Contact Record but keep the associated history records. Alternatively, you might want to update an opportunity or project by deleting old activity records or history records.

Select the opportunity or project from which you want to delete, right-click and select **Delete**.

You can select the types of records that you want to delete from the opportunity or project. You can also synchronize the deletions with other GoldMine systems.

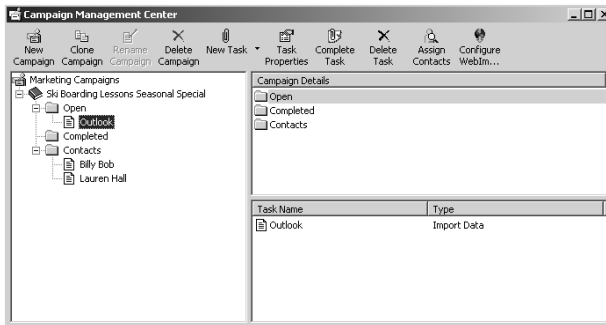
Working with Campaigns

Campaign Management Center

The Campaign Management Center is one of GoldMine's launch pad interfaces for touching customers.

GoldMine provides a single view of customer interactions across sales, marketing, and customer support making contact with customers at all touch points from initial contact to closing the first sale and having the customer buy from your business again and again. Knowing your customer data, identifying where customers come into contact with you and where you wish they had contact with your product/services, you can identify the best way to use GoldMine to communicate your message. You can schedule telephone calls, mail merge campaigns, and design a work flow with Automated Processes to perform a series of actions.

To open the Campaign Management Center select **View>>Marketing Tools>>Campaign Manager**. The Campaign Management Center displays three panes and a toolbar.



The navigation pane on the left displays each campaign. Expand a campaign in the navigation pane to display the Open, Completed, and Contacts folders. Select one of these folders to display the details of the campaign and contact names in the upper and lower right panes, respectively. Using the open and completed details you always know what

tasks are outstanding, what tasks have been completed, and which contacts are being touched.

Toolbar

Like most GoldMine centers, you can right-click and use the local menu or use the toolbar. The Campaign Management Center toolbar offers access to the following options:

- **New Campaign**
- **Clone Campaign**
- **Rename Campaign**
- **Delete Campaign**
- **New Task**
- **Complete Task**
- **Delete Task**
- **Task Properties**
- **Assign Contacts**
- **Configure WebImport**

Local Menu

If you right-click a campaign in the navigation pane, you have access to the following options:

- **New Campaign**
- **Delete Campaign**
- **Clone Campaign**
- **New Task**
- **Task Properties**
- **Delete Task**
- **Complete Task**
- **Assign Contacts**
- **Expand/Collapse**
- **Expand All**
- **Refresh**

GoldMine Campaigns

When you complete a scheduled activity generated from a campaign, GoldMine tracks the completed activity back to the campaign and records the activity as completed in the Completed folder. Thus, a completed campaign activity is stored in the Contract Record's **History** tab and in the campaign.

The **Campaign Creation Wizard** provides a checklist of activities for conducting a campaign. Using the Campaign Creation Wizard you can import data, schedule telephone calls, create mail merges, and attach predefined Automated Processes tracks.

To use the Campaign Creation Wizard, select **View>>Marketing Tools>>Campaign Manager**. Click **New Campaign** on the toolbar.

GoldMine's **Configure Web Import** button on the Campaign Management Center toolbar uses a wizard to set up the Web import. GoldMine's Web import capabilities help you collect contact information from interested visitors directly from your Web site.

Use the WebImport, Leads Management Center, and the Campaign Management Center to design, test, and implement customer treatment strategies and campaigns to improve marketing efficiency and measure effectiveness. By tying sales and marketing promotions with customer data you can provide consistent, personalized customer experiences.

Additional Sales Tools

GoldMine provides useful tools to track and manage sales. In addition to the features covered in this chapter, you can enhance your sales efforts by running the operations listed below. To access these features, select the corresponding commands from GoldMine's main menu:

- To analyze quotas to check the performance of one or more users against the assigned quota for a specified period, select **View>>Analysis>>Quota Analysis**.
- To change your sales territory, select **Tools>>Territory Realignment**.
- To automate routine tasks, such as scheduling sales calls or sending e-mail, select **Tools>>Automated Processes>>Automated Processes Center**.

in this chapter...

- Setting Up E-mail
- Sending E-mail
- Creating E-mail Templates
- Managing Your E-mail in the E-mail Center
- Retrieving E-mail Messages
- Reading your E-mail
- Additional Tools for Managing your E-mail

CHAPTER TEN

10

Sending and Retrieving E-mail

Overview

GoldMine has an extensive range of settings and capabilities for writing, sending, and recording e-mail. One of the primary strengths of using GoldMine for your e-mail is that, like all of GoldMine's features, your e-mail is linked to contacts so an ongoing record of your communications exists — along with the activities you undertake based on those communications.

The GoldMine e-mail system enables you to communicate with others in your organization and with contacts with Internet e-mail accounts outside of the organization.

Tip:

To use GoldMine for Internet e-mail, you must have an account with an ISP providing true Internet mail access. The ISP must support Post Office Protocol version 3 (POP3) and Simple Mail Transport Protocol (SMTP) to send and receive e-mail through the Internet using GoldMine.

Setting Up E-mail

Before you can use GoldMine for your Internet e-mail, you must acquire an Internet e-mail account and set up your system to access the Internet account. After you set up your system for Internet e-mail, you can then configure GoldMine with settings to:

- Format your outgoing e-mail messages.
- Handle your incoming messages.
- Add your Internet e-mail accounts.
- Customize GoldMine's E-mail Center to meet your needs.
- Define advanced settings to apply globally to your E-mail Center, existing attachment files, message operations, and data imported from a World Wide Web (www) site.

Configuring Your Computer to Access Your ISP

Depending on your setup, you can dial by either of the following methods:

- **Manually:** The default configuration in Windows requires manual dialing. From the Windows taskbar, click the **Start** button, then select **Programs>>Accessories>>Dial-up Networking**. In the **Dial-Up Networking** window, double-click the icon for your service provider. In the **Connect To** window, make sure all settings are correct, then click **Connect**. After your computer connects successfully, either start or switch to GoldMine, and then you can send Internet e-mail.

- **Automatically:** Using Microsoft Internet Explorer you can configure Windows to automatically dial to your ISP when you send Internet e-mail.

Note: Default modem and dialing properties are set up in the **Modems** tab of the Windows Control Panel; however, you can select special modem and dialing settings for use only with GoldMine in the **Preferences** dialog box under the **Modem** tab. For more information, see the online Help.

Addressing Internet E-mail

GoldMine displays the contact's e-mail address in the **E-mail** field of the Contact Record. If more than one account is entered for a contact, GoldMine displays the primary account in the E-mail field.

You can add an Internet address for a contact when you create the Contact Record. You can also change the e-mail address later in the Contact Record from either the **E-mail** field or the **Details** tab.

Adding an E-mail Address from the E-mail Field

When you place the insertion point inside the **E-mail** field, GoldMine displays the **E-mail Addresses** dialog box.

If one or more addresses are entered for the contact, GoldMine displays details for the current, primary e-mail address.

Be sure to select **Primary E-mail address** for the address you plan to use most frequently. GoldMine places an asterisk in the **Pty** column to identify the primary e-mail address.

To change settings for the current address, click **New** to add an e-mail account, or click **Delete** to remove an account. You can assign one or more **Merge codes** to categorize the contact for selection when running a mass mailing.

Tip:

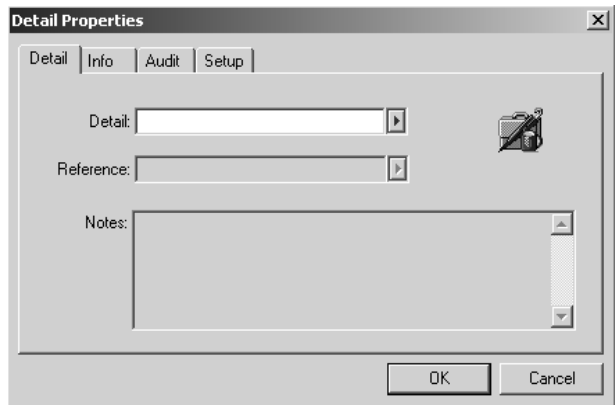
To enter multiple merge codes, separate each entry in the field with a semicolon.

You can also configure some text formatting attributes from the **E-mail Addresses** dialog box, including MIME, rich text (HTML) formatting, and automatic word-wrapping at the end of lines. Ensure the recipient's e-mail account can support these features before selecting them.

Adding an E-mail Address from the Details Tab

In the **Details** tab, right-click to display the local menu and select **New**.

The **Detail Properties** dialog box appears.



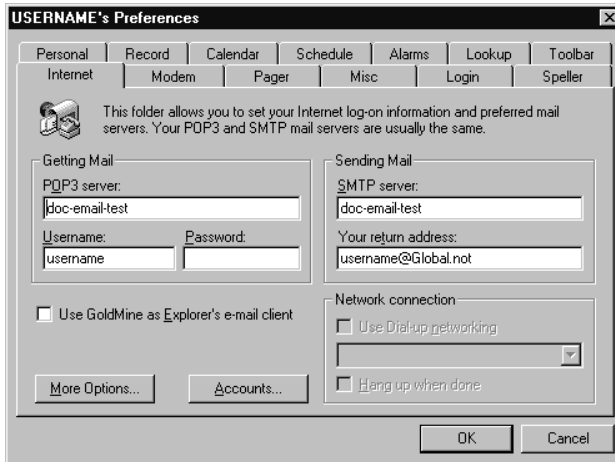
Click the **Detail** F2 Lookup to display the **Detail Names** dialog box and select **E-mail Address**.

Type the contact's e-mail address in the **Reference** field. You can also designate the e-mail address as the **Primary address** and add any helpful, detailed notes such as identifying a personal e-mail account.

You can also edit an address from the **Details** tab. Select the e-mail address you want to edit, right-click and then select **Edit**. The **E-mail Address** dialog box appears from which you can make the necessary changes.

Setting Up Internet E-mail – Basics

Select **Edit>>Preferences**, then click the **Internet** tab.



On the **Internet** tab you must provide the settings to access the servers retrieving your e-mail messages (the POP3 server) and sending your e-mail (the SMTP server). Typically, you use the same server for sending and retrieving e-mail. Specify the Username for your e-mail account, which may not be the same as your GoldMine user name.

You can team Microsoft Internet Explorer with GoldMine to view your e-mail. If you select **Use GoldMine as Explorer's e-mail client**, Internet Explorer displays GoldMine's **Edit E-mail** dialog box when you click an e-mail address appearing as hypertext on a World Wide Web page. Internet Explorer displays GoldMine's E-mail Center when from Internet Explorer's menu bar you select **Tools>>Mail and News>>Read Mail**.

Tip:

Clicking the Accounts button immediately opens the Accounts tab in the Internet Preferences window. You can also click More Options in the Internet tab, then click the Accounts tab.

Accessing Additional Internet E-mail Settings

If you have a single e-mail account and only use basic e-mail operations, the configuration you define in the **Internet** tab is sufficient to send and retrieve e-mail from GoldMine; however, you can define a variety of additional settings.

To access these additional settings, from the **Internet** tab click **More Options** or **Accounts**. Clicking either button displays the **Internet Preferences** window that contains a set of five tabs with options to control:

- Formatting for the e-mail you compose.
- Options for retrieving messages from the Internet.
- Additional Internet accounts.
- E-mail Center configuration.
- Advanced settings to be applied globally to the E-mail Center, existing attachment files, message operations, and data imported from a World Wide Web site.

Defining Options for Composing E-mail

Define settings for GoldMine to automatically apply whenever you write an e-mail message to be sent via the Internet. Selecting these global formatting options can enhance the appearance of your messages.

The **Composing** tab contains settings applicable to all messages you send including:

- Basic formatting, such as the position at which lines wrap in the body text of your messages.
- Additional features to include in a message including your signature file.
- Templates to use for original messages, replies, and forwarded messages.

Defining Retrieval Settings

You can define a variety of options for retrieving messages from your Internet e-mail server.

The **Retrieval** tab contains settings for designating a default path for storing attached files, establish scan intervals for checking your server for new messages, and set the basic criteria GoldMine uses to select messages for retrieval.

Working with Your E-mail Accounts

To manage your Internet e-mail accounts, in the **Internet Preferences** window click the **Accounts** button.

The **Accounts** tab allows you to add up to 256 Internet accounts for a single user. You can change your primary account and change the order of a selected account in the list. You can also set the E-mail Center to display only your primary (default) account.

Configuring the E-mail Center

You can define the appearance and capabilities of GoldMine's E-mail Center.

In the **Internet Preferences** window, click the **E-mail Center** tab to define settings to help you organize and work with messages in the E-mail Center including:

- Account information to display.
- Trash can settings.
- E-mail header display.
- Format to use for dates.
- Folder labels for the messages you have sent and those you have filed.

Customizing E-mail Folders

GoldMine enables you to create your own message filing system by customizing the auto-filing folders in the E-mail Center. You can add an unlimited number of subfolders under the Filed and Sent folders to store messages in as many categories as you need.

E-Mail Security

With S/MIME enabled e-mail, you can send and receive Digital ID signatures and encrypted e-mail messages.

If you and your contact use digital IDs to verify your signatures and to send and receive encrypted e-mail messages, GoldMine allows you to configure your Internet Preferences and the contact's Contact Details to include the necessary information for S/MIME enabled e-mail.

Configuring GoldMine User's Digital IDs

To use Digital IDs in GoldMine, you must configure the **Security** tab in the **Internet Preferences** dialog box. In addition to importing your own digital ID, you must also configure the setting for how Digital IDs are handled in GoldMine. The settings include configuring signature and encryption defaults on outgoing messages, how to handle incoming messages with digital IDs, and how to store S/MIME messages in GoldMine. To configure user settings, select **Edit>>Preferences>>Internet>>More Options>>Security**.

Configuring Contact's Digital IDs

A contact must send you their Digital ID and it must be configured in GoldMine before you can send digitally encrypted messages to the contact. The digital IDs for each contact are managed on the **Contact Details** dialog box. To add or review the information, select and make active the Contact Record. Select **Edit>>Record Properties>>Contact Details>>Digital IDs**.

Sending Digitally Signed E-mail Messages

Your Digital ID must be properly configured on the **Internet Preferences Security** tab before you can send a message with a Digital ID signature. Then to attach a digital signature to an outgoing message, right-click in the body of the message and select **Actions>> Encrypt>>Sign with Digital ID** or click the **Sign with Digital ID** button on the e-mail message toolbar.

Sending Encrypted E-mail Messages

You can use GoldMine to exchange encrypted e-mail messages with a contact. To do this you must have the contact's digital ID that includes his public key and he must have your digital ID that includes your public key. Then, when you have properly configured your Digital ID on your **Internet Preferences Security** tab, you can encrypt on a message-by-message basis by right-clicking in the message body and selecting **Actions>>Encrypt>> Encrypt using Digital ID** or by using the expanded **Encrypt Message** drop-down menu on the **Edit E-mail** toolbar.

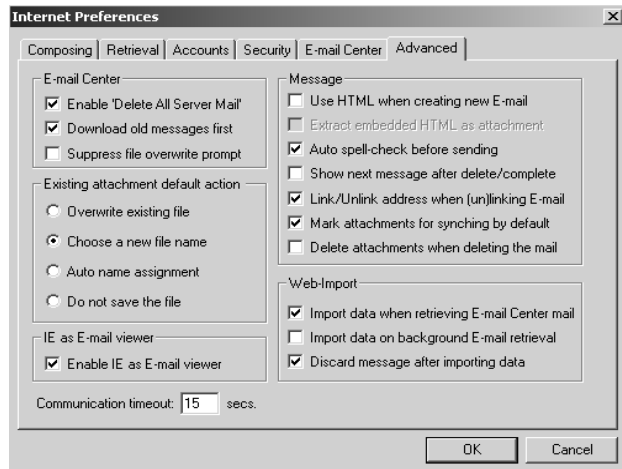
Decoding Winmail.dat files

GoldMine's E-mail Center properly displays e-mail messages created in Outlook using Microsoft Rich Text Format (RTF) settings. GoldMine can extract and separate attachments from message bodies of e-mail messages. Because GoldMine is enabled to work with winmail.dat files, it can extract and separate iCalendar information from the message body of e-mail messages generated in Outlook 2000/XP and Exchange systems using the RTF settings, allowing the proper handling of Outlook meeting requests within GoldMine. The E-mail Center displays decoded attachments.

Defining Advanced E-mail Settings

You can define advanced Internet settings for a variety of GoldMine's e-mail capabilities.

In the **Internet Preferences** window, click the **Advanced** tab.



Tip:

Typically, you will want to accept GoldMine's default setting that links the message to the contact. However, you can remove the link.

The **Advanced** tab contains a variety of settings for e-mail display and operation including:

- Advanced settings for the E-mail Center.
- The default actions GoldMine takes when detecting a file attached to an incoming message has the same file name as a file retrieved previously.
- A method for displaying messages with HTML formatting.
- Additional options for sending and retrieving messages.
- Options for importing data from a Web site (Web-Import).
- Length of time in seconds that GoldMine remains idle before disconnecting from the network.

Sending E-mail

GoldMine provides two methods of sending and retrieving e-mail:

- **Internet e-mail:** Uses the Internet to communicate with any recipients who have an account with an ISP.
- **GoldMine e-mail:** Uses the GoldMine system to communicate over a network with other members of your organization.

The difference between GoldMine e-mail and GoldMine's Internet e-mail is the type of connection used to send the message. GoldMine e-mail uses your organization's network to send messages between users who can access the network. You can use GoldMine e-mail to communicate offline with other GoldMine users.

GoldMine's Internet e-mail feature sends messages to any recipient who has an Internet e-mail account. You must access your ISP to send and retrieve Internet e-mail, although you can queue messages to send at a later time.

Both e-mail methods provide an extensive set of options you can use to address, format, and send messages.

You can create a GoldMine e-mail or Internet e-mail message by selecting the following commands from the Main Menu:

- **GoldMine e-mail:** Select **Schedule>>GoldMine E-mail**. The message is addressed to a GoldMine user.
- **Internet e-mail:** Select **Contact>>Create E-mail>>Message to Contact**. The message is addressed to the current contact.

This chapter focuses on working with Internet e-mail; however, many of the same features are available for GoldMine e-mail.

Tip:
See "Creating E-mail
Templates" on page 10-14
for details.

Creating E-mail Messages

Using GoldMine, you can send e-mail to any individual who has an Internet e-mail account, even if the recipient does not have a Contact Record.

You can quickly send a simple text message to a recipient, or you can work with a variety of options defining formatting and delivery settings, including attaching files to send with your message.

Select **Contact>>Create E-mail>>Message to Contact**.

GoldMine automatically enters the routing information in the **To** and **From** text boxes. You can change the information as need, including sending the message to the following types of recipients:

- Another contact in the open database.
- A manual recipient who is not entered in the database—you can either enter a recipient on-the-fly or use a previously saved address.
- A GoldMine user or group—your message is converted from Internet e-mail to GoldMine e-mail when selected for the primary recipient in a message.
- A distribution list.
- An Outlook (MAPI) recipient.

You can use the same recipient types when adding cc and bcc recipients.

Each message you send should have a Subject line, identifying the main topic of the message. Type a Subject or select a template in drop-down list to work with a pre-designed e-mail message. As soon as you enter the Subject, GoldMine displays the subject in the title bar.

Once you have the message addressed and configured, place the cursor inside the text area below the Subject and start typing your message. As soon as the insertion point is placed in the text area, GoldMine displays an HTML text editing toolbar from which you can select a variety of formatting

options such as font size, alignment, and background color.

If your message contains HTML formatting, you can edit the source code. Click the **Edit Source** button or select the **Edit HTML Source** command from the local menu to display HTML tags.

Additional sending options are available as you prepare your message. The options include:

- **Assigning a Password and Encryption to E-mail Messages:** You can enhance the security of your e-mail by setting up a password and applying encryption.

In the **Edit E-mail** toolbar click the **Encrypt Message** button.

- **Selecting Options for Your Message:** You can write and send a message by working only in the **Recipients** tab, or you can work with settings in other tabs to customize your message.

Click the **Options** tab on the left side of the **Edit E-mail** dialog box to work with text formatting and recording message options.

- **Attaching Files:** You can attach one or more files to your e-mail message. GoldMine displays the file name of each attachment and the button representing the application that created the attached file.

Click the **Attachments** tab to attach files.

Tip:

Before sending, queuing, or saving your message, you can click one of the side tabs to select options to apply to your message.

Sending Your Message

You can select how to dispatch your message by clicking one of the following toolbar buttons:

- To send now, click the **Send** button.
- To queue to send later, click the **Queue** button.
- To save a draft, click **Draft** button, then select one of the options.

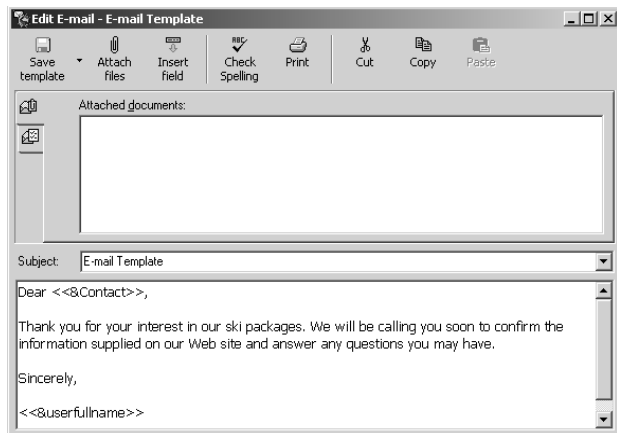
Creating E-mail Templates

Creating e-mail message templates with fixed content to use repeatedly helps you streamline the communication process. Templates use merge fields from the contact database to integrate custom information with the text such as the name of the contact, your full name for a signature, and so on.

Select **Contact>>Create E-mail>>Customize Templates**. The **Document Management Center** appears.

Select the **E-mail Templates** folder to in the left pane and then right-click to display the local menu. Select **New**.

The **Edit E-mail** template dialog box appears.



Using the **Edit E-mail** template dialog box you use to create and send messages, you can use to create templates. The **Edit E-mail** template dialog box includes the **Options** tab and the **Attachments** tab.

To save the template, you must type a **Subject** for the template. The subject becomes the template name.

In the text area, type the text for the template's content. To personalize the message, in the **Edit E-mail** toolbar click the **Insert field** button to insert GoldMine fields.

You can easily place GoldMine data fields or merge macros in the body of your e-mail message. For example, to include the name of the contact in the salutation type **Dear**, then position the cursor after the word. Click the **Insert Field** button, then select **Recipient Name** from the list. GoldMine replaces the field values with values from the currently open contact database.

You can also use the same process to add macros to the template. For example, you can place the macro <<Cursor>> at the point in the template you want the cursor to appear when you select a template as the basis of a message.

Selecting a Default Template

Select your default e-mail templates for outgoing messages, replies, and forwarded messages in the **Composing** tab of the **Internet Preferences** dialog box or from the Document Management Center.

Managing Your E-mail in the E-mail Center

GoldMine's E-mail Center provides a convenient way to manage your e-mail from one location. You can view, organize, and retrieve Internet e-mail from the E-mail Center. Although you often start from a Contact Record when creating e-mail, you can edit e-mail drafts and also send queued e-mail for any contact from the E-mail Center.

Working in the E-mail Center

Select **View>>E-mail Center**.

The E-mail Center has three major sections:

- **E-mail Center tree:** (left area) Displays options you can use to connect to your mail server and organizes incoming, outgoing, and filed messages, as well as access your Microsoft Outlook folders.
- **E-mail message browse window:** (upper-right area) Lists messages available in the inbox, outbox, or selected tab.
- **Preview area:** (lower-right area) Displays the beginning text of a message selected in the listing browse window – GoldMine's default is 15 lines.

The E-mail Center provides a toolbar from which you can run commands to organize and handle your e-mail. The icons available at any time depend on the status of the online connection or the folder selected.

Organizing Your Messages

Using the tree in the left area of the E-mail Center, you can store your messages in the organizational hierarchy best suited to meet your needs. Set up folders to store your mail before using the E-mail Center to send or retrieve mail.

You can add subfolders to the Inbox, Sent, and Filed folders. You can create a multi-tiered hierarchy, adding unlimited number of second-level folders.

Creating Distribution Lists

You can send an e-mail to multiple recipients by using a Distribution List. You can create a Distribution List including contacts with Internet e-mail addresses as well as other members of your organization who use GoldMine e-mail.

To display the Distribution List Center, where you create and manage distribution lists, click the **Set up Distribution lists** button in the E-mail Center.

GoldMine can create two types of Distribution Lists, private lists for your own use, and global lists to share with other GoldMine users.

If you have the required authorization, you can switch between private and global list types by clicking the button in the upper-left side of the **Distribution List** toolbar.

To create a Distribution List, click the **New Distribution List** button in the toolbar.

Creating E-Mail Rules

You can define and apply rules to process and organize your incoming or outgoing e-mail. You can create an e-mail rule set containing rules to specify conditions and actions to handle e-mail. You can select one of these sets whenever needed to control how messages are treated. For example, you can use e-mail rules to filter incoming messages, minimizing the amount of unwanted e-mail.

To use e-mail rules, you must:

- Create one or more rule sets.
- Select the rule set you want to apply to incoming e-mail.
- Activate the rule(s) you want GoldMine to apply to incoming e-mail (if the rule set contains more than one rule).

Tip:

For details about the Accounts tab, see "Working with Your E-mail Accounts" on page 10-7. For details about the Retrieval tab, see "Defining Advanced E-mail Settings" on page 10-10.

To display the **E-mail Rules Center**, click the **Rules** button in the E-mail Center toolbar.

The E-mail Rules Center contains a list of rule sets and component rules in the left area and details about the rules and rule sets in the right area.

Users with Master Rights can define and apply rules to process and organize incoming e-mail for all users. Global rules override any conflicts with user-defined e-mail rules. You can click the **Global Rules** button on the far right side of the E-mail Rules Center to switch between global and private rule modes.

You must create a rule set into which you can add individual rules. On the E-mail Rules Center toolbar click **New**, then select **New Rule Set**. The **E-mail Rules Wizard** appears, in which you can define:

- The type of e-mail the rule handles, for example, Incoming E-mail.
- Component rules.

A rule consists of the condition(s) triggering corresponding action(s). You can select the conditions and actions from drop-down lists in the E-mail Rules Wizard.

After you define the rule set, you can add, edit, and delete rules from the rule set, as well as conditions and actions in a rule.

Although you can create multiple rule sets, GoldMine can apply only one rule set to your e-mail. You can activate a rule set by selecting the rule set name in the left area of the E-mail Rules Center.

By default, GoldMine activates all component rules in a rule set. You can disable an individual rule by clearing the check box next to the rule.

Retrieving E-mail Messages

You can use GoldMine to retrieve e-mail from both:

- Other users within your organization who send GoldMine e-mail.
- Contacts outside of your organization who send Internet e-mail.

Retrieving GoldMine E-mail

GoldMine places your incoming GoldMine e-mail messages in the following locations:

- **E-mail Center: Inbox**
- **Activity List: Open** and **E-mail** folders

E-mail Message Previewing

You have the option to show or hide the preview of e-mail messages in the E-mail Center. Right-click on the Online, Inbox, Outbox, Deleted, or Draft folders and select **Options>>Show Preview** to toggle the display on or off.

You can set this as the default in the [Internet] section of the Username.ini with the following command:
ShowPreview=1.

Retrieving Internet E-Mail

GoldMine can retrieve Internet e-mail automatically or manually.

To automatically scan your Internet e-mail account at specified intervals and retrieve any messages waiting on the server, you must define settings in two tabs of the **Internet Preferences** dialog box:

- **Accounts tab:** Select **Auto-retrieve** to establish automatic scanning and retrieval.
- **Retrieval tab:** Specify the scanning/retrieval interval in **Retrieve mail every x minutes**.

To manually retrieve Internet e-mail, select **View>>E-mail Waiting Online**. GoldMine opens the E-mail

Tip:

After the E-mail Center is open, you can retrieve e-mail from any other account listed under Online.

Center and displays all of the messages sent to your default e-mail account.

The E-mail Center previews the beginning lines of a selected e-mail message. By default, GoldMine displays up to 15 lines of a message. You can increase the preview amount.



See the online Help for instructions regarding the Username.ini file.

To retrieve a message from the server, drag the entry from the upper-right area of the E-mail Center to the Inbox.

Deleting Messages from the Server

To delete a selected message from the server, in the E-mail Center toolbar, click the **Delete selected message** button. If, in the **Internet Preferences** dialog box under the **Advanced** tab, you select **Enable Delete All Server Mail**, the E-mail Center toolbar includes a button you can click to delete all messages.

Reading Your E-mail

Reading your e-mail offline can be cost-effective as well as convenient. After you read a message, you can reply or complete e-mail from the same dialog box.

You can read your e-mail from the sender's Contact Record under the **Pending** tab in the Activity list or from the E-mail Center.

You can read your e-mail while you are online. After you connect to your e-mail server, drag the message listed in the upper-right area to the Inbox.

Note: On the **Retrieval** tab of the **Internet Preferences** dialog box, you can select **Open 'Read E-mail' dialog on retrieval** and GoldMine opens an e-mail message upon retrieval for you to read in the E-mail Center.

You can also read a message stored in the Inbox. Right-click on the message you want to read, then select **Read**.

You can perform a variety of operations on a message, such as forwarding the message to another contact or GoldMine user or replying to the message sender. You can execute commands from either the local menu or the toolbar.

When an embedded message is attached to an incoming e-mail message, you can double-click the embedded message. The message opens in a special e-mail reader window. Click the button to import the message into GoldMine.

Additional Tools for Managing Your E-mail

Aside from the features covered in this chapter, you can run additional operations to work with your e-mail. To access these features, select the corresponding commands from GoldMine's Main Menu:

- To set up an e-mail merge, select **Contact>>Create E-mail>>E-mail Merge**.
- To create a Microsoft Outlook e-mail message while working in GoldMine, select **Contact>>Create E-mail>>Outlook Message to Contact**.
- To attach an Automated Process to automatically send an e-mail message when a defined condition occurs, select **Contact>>Assign a Process**.

in this chapter...

- Installing the GoldMine Link to Word
- Creating Document Templates
- Linking Files to a Contact Record
- Printing Correspondence
- Faxing Correspondence
- Additional Correspondence Tools

CHAPTER ELEVEN

11

Printing and Faxing

Overview

You can use GoldMine in conjunction with your other business software to print or fax correspondence to your contacts. You can use one of GoldMine's standard templates for letters, memos, and fax cover sheets and also create envelopes and mailing labels to be printed with the letters or memos.

If you need a customized layout, you can use Microsoft Word to design the form and then merge your GoldMine data to personalize the correspondence for each contact. GoldMine also supports print merging to spreadsheet applications.

You can maintain a complete history of the templates created, printed, or faxed to a contact. Additionally, you can link any form or file type to a Contact Record. When you click on the link, GoldMine starts the application that created the file and loads the linked file.

Installing the GoldMine Link to Word

To merge information from GoldMine to Microsoft Word, you must install the GoldMine Link to Microsoft Word. The GoldMine Link supports the following versions of Word:

- Microsoft Word 97 with Service Release 1 (SR-1) or Service Release 2 (SR-2) installed
- Microsoft Word 2000
- Microsoft Word 2002 (XP)

If you selected either **Typical** or **Compact** when installing GoldMine, your installation includes approximately 20 mail merge templates. Each user can customize any of these templates. The GoldMine installation installs all templates to the \GoldMine\ Template folder. When you open the Document Management Center for the first time, you can open any of the merge forms listed under the user name **(public)**.

If you selected the **Custom** installation option and did not install the mail merge form templates, you can run the GoldMine installation again, and select only this option.

Checking for the ODBC Drivers in Word

To install the GoldMine Link to Word, you must have the Microsoft Visual FoxPro/dBASE ODBC drivers installed in Word. You can run a check to ensure these drivers are installed.

If necessary, you can install the ODBC drivers for Word.



For details on checking for and installing the necessary ODBC drivers, get Technical Document #550 "Installing and Using GoldMine's Add-in link to Word" from FrontRange Solutions' support site at **support.frontrange.com**. Technical Document #550 also contains instructions on uninstalling older versions of GoldMine's add-in link, and various methods of installing the current add-in link.

Upgrading from a Previous Version of GoldMine

If you are upgrading from a previous version of GoldMine, you must upgrade your GoldMine Link to Word as well. You must uninstall older links used by previous versions of GoldMine before you can install the current link. To easily install the new version of GoldMine link and uninstall the old, use the GoldMine Word Link Installer.

Methods of Installing the Word Link

You can install GoldMine's Word link by one of the following methods:

There are two easy methods for installing the GoldMine Link to Word:

- **GoldMine's Quick Start Wizard:** Select **Tools>> QuickStart Wizard**. Click the **Document Management Wizard** button. Available for GoldMine using a D-license.
- **GoldMine Word Link Installer:** Double-click the **GMLink Installer.exe** in the GoldMine directory.

Using Fax Applications with GoldMine

GoldMine supports the following fax applications:

- RightFax
- Winfax
- OmniRush
- Zetafax

Your fax application must be installed before installing the GoldMine link. If you install the fax application after you install the link, you must uninstall and reinstall GoldMine's link to Word.

Creating Document Templates

Tip:

If you are not familiar with adding DDE linkage fields to documents in your word processor, you might want to clone an existing template and then make changes to the cloned template.

GoldMine provides a set of standard templates. You can use standard templates, customize templates, or add your own templates. You can create an unlimited number of templates to manage all of your contact-based correspondence. You set up the templates in a separate, or target application, such as a word processor or spreadsheet.

After you install a link between GoldMine and Word, you can use Word to create the template. You can select the GoldMine fields you want to embed into the layout to merge contact information into the template. These embedded fields are DDE linkage fields.

You can access GoldMine's templates in the Document Management Center. From the Main Menu, select **Edit>> Customize Templates**. The **Document Management Center** appears.

Creating Letters, Memos, or Fax Forms

You can create a template by either:

- **Cloning a selected template:** Uses the settings of the selected template as the basis of the new template. This method provides a simple way to create a template that is similar to an existing template.
- **Creating a template:** You work with the same settings in the **Document Template Properties** dialog box to create a template and link to the Document Management Center.

Create a template by clicking the **Document Management Center** toolbar's **New Template** button.

Creating Document Templates in Word

The GoldMine menu in Word contains special commands for working with your GoldMine templates, including commands to:

- Insert GoldMine merge fields into the layout.
- Save the GoldMine template.
- Work with the link between the target application and GoldMine.

Tip:

You can place data fields or merge macros in the body of your template. For example, to include the name of each contact in the salutation of a letter created with WordPad, type Dear <<contact1->contact>>. GoldMine replaces the field values with values from the currently open contact database. You can use a variety of macros, including &NameAddressPar, &AddressPar, and &CityStateZip.

Updating Previously Created Templates

You must update a template when you want to:

- **Use templates created with previous versions of GoldMine:** You must update your existing GoldMine templates if you upgraded from GoldMine 5.5 or earlier directly to GoldMine version 6.7.
- **Change a template you want to maintain by the original file name.**

From the Document Management Center, right-click the template you want to update, and then select **Properties**. The **Document Template Properties** dialog box appears.

To work with the template's layout, select **Edit**. GoldMine starts the linked target application. You can work in the target application to make changes and update the template. For example, if you are working in Word, you can work with the commands on the GoldMine menu to add or change text and merge fields.

When done, select **GoldMine>>Update GoldMine Form**. Word overwrites the previous file with the modified file.

Organizing Templates in Subfolders

You can organize your document templates in subfolders to categorize and manage your correspondence.

To add a subfolder, select the parent folder, right-click and select **New Folder**. Give the folder an appropriate name.

Inserting Your Signature

You can insert your graphical signature into a template created with Word. Adding a signature file is a two-step process requiring:

- Setting up the signature file so GoldMine can identify and access the file.
- Inserting the file into the template.

Setting Up Your Signature File

To use a signature file in a GoldMine template, you must have:

- A signature bitmap file saved as Username.bmp, for example, JOHNDOE.bmp. To be used successfully, you must save the file in the .bmp format.
- An entry in the GM.ini file designating the path and file name of the signature file.

You must designate the path and file name for the signature file in the GM.ini file. You can open GM.ini with a text editor, such as the Windows Notepad.

Under the [GoldMine] section of GM.ini, type **SigDir=drive:\directory** where **drive:\directory** represents the path to your .bmp signature file.

Inserting Your Signature

You can add a signature file only to a template created with Word. Your signature file must be a .bmp file saved with your GoldMine user name as Username.bmp. You must also provide the path and file name in GM.ini as described in the previous section, "Setting up your Signature File."

From the Document Management Center, right-click the template to which you want to add your signature. Select **Properties**. The **Document Template Properties** dialog box appears.

Tip:

GM.ini is a special text file known as an initialization file in which you can add or change entries to customize GoldMine's features.

Tip:

You can also use linked documents as the basis of building a group. For details about working with groups, see Chapter 6, "Working with Subsets of Contacts."

Tip:

If you use Microsoft Word to create and work with GoldMine templates, documents may be linked automatically when you open them in Word.

Select **Edit**. GoldMine starts Word and then loads the template. Position the insertion point on the line where you want to place your signature. From Word's Main Menu, select **GoldMine>>Insert GoldMine Field**, then select **&Signature**.

Linking Files to a Contact Record

Linking correspondence to a Contact Record enables you to create a "paper trail" to quickly recall documents associated with a contact. GoldMine stores linked document records under the **Links** tab. For example, if a prospect calls to discuss a bid you sent, you can retrieve the document quickly by double-clicking on the link stored with the prospect's record.

You can also manually link documents. You can either link a document by using the local menu in the **Links** tab, or by dragging and dropping files directly from Windows Explorer into GoldMine. In addition to file links, you can link any Windows folder to a Contact Record.

Linking Files from the Links Tab

You can link a document to a Contact Record from the **Links** tab. Right-click in the **Links** tab's browse window, then select **New**.

To link a document, you must provide the path and file name of the document you want to link. You can assign an owner and add descriptive notes.

You can provide a descriptive document name, but you can link the document with only the path and file name.

Printing Correspondence

GoldMine provides a set of templates for a variety of correspondence including letters and memos, allowing you to merge with contacts and print. In addition, you or your system administrator can modify the standard templates or create additional templates. For details, see "Creating Document Templates" on page 11-4.

You can select the template from the templates available in GoldMine's Document Management Center or by assigning templates as the default letter or memo.

Note: GoldMine stores templates in the GoldMine\ Template folder.

You can modify the letter by adding headings or text to the template. When you are satisfied, you can print the correspondence from your word processor.

Printing Correspondence from the Document Management Center

You can manage and print correspondence from GoldMine's Document Management Center.

Select **View>>Document Management Center**.

In the Document Management Center, select the letter, memo, or fax template you are using and right-click. Select **Merge & Edit** or **Print**, depending on your desired action.

Merge & Edit launches the document in Word, allowing you to edit as needed.

Print opens the **Mail Merge Properties** dialog box and allows you to merge the document to one contact or to a filtered group of contacts.

Tip:

You can also access the Document Management Center from the Edit menu and the Contact menu.

Tip:

You can designate a selected template as your default letter in the Document Management Center. Right-click the file you want, then select **Set as Default>>Letter**. You can use the same method to designate a default memo template.

Tip:

You can check on queued correspondence in GoldMine's Literature Fulfillment Center. From the Main Menu, select **View>>Literature Fulfillment**.

Printing your Default Letter or Memo

If you have selected a default template, you can quickly generate the letter or memo to the active contact.

Select **Contact>>Write>>Letter to Contact** or **Contact>>Write>>Memo to Contact**.

Printing Envelopes and Labels

You can print envelopes and labels on demand using the same method described for letters, memos, and faxes. You can also set up GoldMine to print envelopes or labels for documents waiting in a print queue on the same date GoldMine generates the queued documents.

To print envelopes or labels when queued documents are printed, select **View>>Literature Fulfillment**.

Select the folder under **Queued Documents** corresponding to the date the queued correspondence is scheduled to be sent. For example, if the letters are scheduled to be printed later in the current week, select **This Week**.

In the upper-right area, right-click each queued document for which you want to print an envelope or label. From the local menu, select either **Print Envelopes** or **Print Labels**. Depending upon your selection, GoldMine displays either the **Print Envelopes** dialog box or the **Print Labels** dialog box. Each dialog box contains the same commands.

In the **Print Envelopes** dialog box, select the contacts for whom you want to print envelopes and then select the envelope template that you want to use. By default, GoldMine displays your templates. However, you can look in the **User** drop-down list and select a **(public)** template or another user's template.

Faxing Correspondence

You can fax directly from GoldMine if you install one of the following applications on your system:

- Symantec WinFax PRO 7.01 or later. You can check the version of WinFax PRO running on your system by selecting the WinFax Main Menu command **Help>>About**. To use Symantec WinFax PRO, you must also have Microsoft Word version 7.0 or later installed with the WinFax PRO printer driver.
- RightFax, a network faxing system. To use RightFax, you must install a printer driver in Windows named RightFax configured to print to the RightFax server.
- Zetafax 7.5 or later.

Note: Third-party add-on OmniRush provides an integrated fax support solution. For details, visit either the FrontRange Solutions Web site at **www.fronrange.com** or the Z-Firm LLC Web site at **www.zfirmllc.com**.

You can fax correspondence by selecting either:

- One of the templates available in GoldMine's Document Management Center or
- Your default fax template.

GoldMine opens the application used to create the template, such as Microsoft Word, and then displays the template with information merged from the contact's record.

You can add headings and text as needed and then send the fax from the word processor. For example, if you used Microsoft Word, from Word's Main Menu, select **File>>Send To>>GoldMine Contact via WinFax** (or your installed fax application).

Faxing Correspondence from the Document Management Center

You can fax correspondence from GoldMine's Document Management Center.

Select **View>>Document Management Center** and right-click the fax template. Select **Fax**. The **Mail Merge Properties** dialog box appears.

Faxing your Default Fax Sheet

If you have selected a default fax template, you can quickly generate the fax sheet to fax telephone number entered for the active Contact Record.

Select **Contact>>Write>>FAX to Contact**.

Additional Correspondence Tools

In addition to the features covered in this chapter, you can run the operations listed below to work with correspondence. To access these features, make the following selections:

- To set up and use templates for e-mail correspondence, select **Contact>>Create E-mail>>Customize Templates**.
- To set up, edit, and fulfill requests for literature such as brochures, price lists, and so on, select **View>>Literature Fulfillment**.
- To request literature for one contact or a group of contacts, select **Schedule>>Literature Request**.
- To attach an Automated Process to automatically print correspondence when a defined condition occurs, select **Contact>>Assign a Process**.

Tip:

You can designate a selected template as your default fax sheet in the Document Management Center. Right-click the file you want and then select **Set as Default>>Fax**.

in this chapter...

Selecting Reports
Printing Reports

CHAPTER TWELVE

12

Running Reports

Overview

The GoldMine Report Center lets you generate any type of business report – and more – from the data in your contact databases.

GoldMine reporting lets you sort data from your contact database and send the report either to your monitor for display or to your printer. You can select pages to print from a monitor display. If you want to use a printer other than the Windows default printer for a specific report, you can select a different printing device from a list of installed printers.

GoldMine includes over 50 standard report templates you can use or modify to present the information you need.

Note: If your organization has special reporting needs requiring custom layouts, a developer can use GoldMine's form designer to produce a custom report from a blank template or from cloning and modifying one of the standard GoldMine reports.

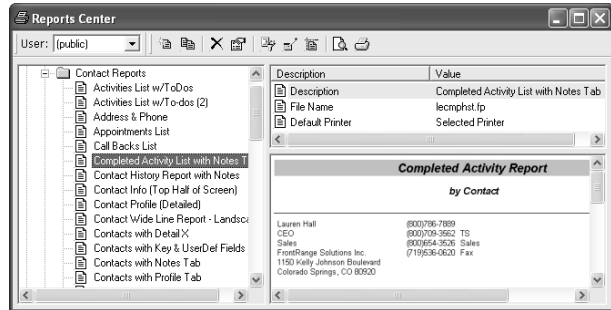


For details about the form designer, see the *Administrator Guide* and the online Help.

Selecting Reports

GoldMine's **Reports Center** is the central location from which you can select your report, configure the properties, and then move to the layout if you need to make changes.

To launch the Report Center, select **File>>Customize Reports**.



The Reports Center has three panes. The first displays the available reports in a tree structure. The second displays the details regarding the file or report profile of the report you selected in the tree pane. The third displays a static .jpg preview of the selected report.

Note: The system reports do not have .jpg previews to display.

Toolbar

Like most GoldMine centers you can right-click and use the local menu or use the toolbar. The toolbar offers access to the following options:

- **New Report**
- **Clone Report**
- **Delete Report**
- **Report Properties**
- **Report Sorts**
- **Report Options**
- **Edit Report Layout**
- **View Saved Report**
- **Print Report**

Local Menu

If you right-click a report in the tree pane, you launch the **Reports** local menu that contains the following options:

- **Print**
- **Layout**
- **Options**
- **Sorts**
- **View Saved**
- **Find**
- **Output to**
- **New**
- **Clone**
- **Delete**
- **Properties**

Report Properties

The **Report Properties** dialog box now includes all the configuration settings that were previously in separate dialog boxes:

- **Profile:** The report description, file name, and printer.
- **Sorting:** The primary, secondary, and tertiary sort options for the current report.
- **Options:** The history, calendar, and linked data to include in the report.

The Reports Menu groups reports in six categories:

- **Contact Reports:** These reports format contact data to meet a variety of needs, such as phone lists and completed activity logs.
- **Calendar Printouts:** These printouts organize scheduled activity data in graphical formats such as monthly calendars.
- **Analysis Reports:** These reports present statistical information similar to the analyses available from the **View** menu such as phone call statistics and quota analyses.
- **Labels and Envelopes:** These format selected data in dimensions fitting Avery label types and envelopes.
- **Other Reports:** These offer a variety of useful, easy-to-read layouts for your Personal Rolodex entries, data from the Opportunity/Project Manager, and other available document templates.
- **System Reports:** These generate reports from the **Output to** command on GoldMine local menus.

By default, GoldMine displays Contact Reports. You can select another category from the Reports Categories list, such as Calendar Printouts. As soon as you select a category, GoldMine displays the individual reports available for the category under Report Description.

Note: If Crystal Reports is installed on your system, you can display those reports from the **Reports** Menu. From the **Type** drop-down list, select **Crystal**.



For details about using Crystal reports in GoldMine, see the online Help.

Displaying the Reports of a Selected User

By default, GoldMine displays reports available to all users. You can also display your own reports or reports created by another user. In the **User** drop-down list, select a list of another User's reports.

Selecting Data for a Report

You can select the Contact Records you want to include in your reports.

From the **Reports** Menu, select from the following options in the Contacts section:

- **All:** Includes all Contact Records in the selected database(s) in the report.
- **Current:** Includes only the currently displayed Contact Record in the report.
- **Filter or Group:** Includes only Contact Records in the report either meeting the criteria of an activated filter or that are members of an activated group.

Note: The availability of Contacts options depends upon the report category you select. For example, when you work with your Daily Appointment List (Calendar Printouts), you can only select from **All**, **Filter**, or **Group**. The **Current** option is not available.

The **Reports** Menu provides additional options to help you select specific data for your Contact Reports, Analysis Reports, or Calendar Reports.

Selecting Data for Contact Reports or Analysis Reports

After you select a Contact Report or Analysis Report, you must select the data to include. GoldMine provides options letting you specify:

- Users
- Activities
- Linked data such as Document Links and Referrals
- Date ranges and activity codes

You can use the settings to run one report or save the settings for future runs of the report.

In the **Reports** Menu dialog box, under **Reports Categories**, select either **Contact Reports** or **Analysis Reports**. Under **Report Description**, select the report you want to run, then click the **Report Options** button, or right-click the highlighted report and select **Options**.

The **Option** tab of the **Report Properties** dialog box appears.

Report Properties

Profile | Sort Orders | **Options**

Reports in the Contact, Analysis, and Label and Envelope report categories can include different type and/or ranges of GoldMine information. To determine what will be included in this report, please choose from the available history, calendar, user(s), codes and dates, as well as linked record options, below:

History Data

<input checked="" type="checkbox"/> Phone Calls	<input checked="" type="checkbox"/> Others
<input checked="" type="checkbox"/> Messages	<input checked="" type="checkbox"/> Forms
<input checked="" type="checkbox"/> Next Actions	<input checked="" type="checkbox"/> Events
<input checked="" type="checkbox"/> Appointments	<input checked="" type="checkbox"/> To-dos
<input checked="" type="checkbox"/> Sales	

User: (all) [v]

Date: 1/1/1980 [v] Actv: []

To: 12/31/2099 [v] Result: []

Calendar Data

<input checked="" type="checkbox"/> Appointments	<input checked="" type="checkbox"/> Forecast Sales
<input checked="" type="checkbox"/> Call Backs	<input checked="" type="checkbox"/> Others
<input checked="" type="checkbox"/> Messages	<input checked="" type="checkbox"/> Events
<input checked="" type="checkbox"/> Next Actions	<input checked="" type="checkbox"/> To-dos

User: (all) [v]

Date: 1/1/1980 [v] Actv: []

To: 12/31/2099 [v]

Linked Data

<input checked="" type="checkbox"/> Other Contacts	<input checked="" type="checkbox"/> Details	<input checked="" type="checkbox"/> Organizations
<input checked="" type="checkbox"/> Document Links	<input checked="" type="checkbox"/> Referrals	

OK Cancel

Selecting History and Calendar Data

You can select the types of History Data and Calendar Data that you want to include in your report.

Note: If you clear all History Data or Calendar Data items or no data exists for any of the selected data types, GoldMine suppresses the section(s) of the report and continues with the next section for which data is available.

You can also limit record selection by specifying any or all of the following:

- The user associated with the History or Calendar records. Typically, the user is the individual creating the records. By default, GoldMine includes the records of all users.
- The date ranges for History or Calendar records. By default, GoldMine sets the date range from 01/01/80 to 12/31/2099 for each category.
- The activity code.
- The result code (History records only).

Selecting Other Contact Record Data

Your report can include data from records linked to the selected Contact Record(s). You can even specify the report provide additional information stored in the Contact Record. You can select one or more of the following items located in the **Linked Data** area:

- **Other Contacts:** Includes information about additional contacts associated with the Contact Records including the additional contact's name, title, telephone number, and reference data associated with the additional contact.
- **Details:** Includes information from Detail Records linked to the Contact Records including the reference and creation date of the record.
- **Organizations:** Includes Org Chart information linked to the Contact Records.

- **Document Links:** Includes information about documents linked to the Contact Records including the user name of the author, the creating application, and the path and file name of the document.
- **Referrals:** Includes information about referrals linked to the Contact Records including the source of the referral (of:), the recipient of the referral (to:), and reference data about the referral.

To use the same settings when you run the report in the future, click **Save Settings**.

Selecting Data for Calendar Reports

After you select a Calendar Report, you must select the data to be included.

If you clear all History Data or Calendar Data items, or no data exists for any of the selected data types, GoldMine suppresses the section(s) of the report, and continues with the next section for which data is available.

In the Reports Menu dialog box, under **Reports Categories**, select **Calendar Printouts**. Under **Report Description**, highlight the report you want to run, then click the **Report Options** button.

The **Report Properties** dialog box appears. Select the **Options** tab.

Report Properties

Profile Options

Reports in the Calendar category can include different type and/or ranges of GoldMine information.

To determine what will be included in this report, please choose from the available user(s), activity types, and detail text, as well as day, week, or month display options, below:

User: (Current User)

Date: 9/1/2004

To: 9/30/2004

Time:

To:

Include Activities

- ☒ Appointments
- ☒ Call Backs
- ☒ Messages
- ☒ Next Actions
- ☒ Forecast Sales
- ☒ Others
- ☒ Events

Detail Text

- ☒ Activity Type
- ☒ Activity Code
- ☒ Time
- ☒ Duration
- ☒ Reference
- ☒ Contact
- ☒ Phone

Page Layout

☐ Weekly ☐ Daily (fixed)

☒ Monthly ☐ Daily (variable)

OK Cancel

By default, GoldMine includes records from the current user; however, you can select a different user as the subject of your report.

You can set the date range and time period from which to select calendar records for the report.

By default, GoldMine includes all activity types in a Calendar report such as appointments, messages, and so on. Clear the activity types you want to skip.

For each selected activity type, GoldMine adds a variety of detail text from the activity record, such as the contact's name, phone number, duration of the call or activity, and more. By including detail text for each activity, you can produce a report tailored to specific audience needs. If you do not need detailed information for each activity, reduce the length of your report by clearing any unnecessary detail types.

GoldMine can format your Calendar report using one of the following page layouts:

- **Weekly**
- **Monthly**
- **Daily (fixed):** Prints all hourly slots from 7:00 a.m.–7:00 p.m. whether activities are scheduled for every hour. Each hourly slot includes a set number of lines, typically two or three lines.
- **Daily (variable):** Prints hourly slots from 7:00 a.m.–7:00 p.m. only if an activity is scheduled for the hour. For example, if a meeting is scheduled for 9:00 a.m., but no other activities are scheduled for the day this format prints only the 9:00 a.m. slot and the entry for the scheduled meeting. Each scheduled slot includes as many lines or pages as needed to print the entire entry for the activity.

To use the same settings when you run the report in the future, select **Save Settings**.

Sorting Report Data

When you prepare a report, you typically want to present the information in a certain order; that is, you want to organize the data in a sequence that makes the information clear and meaningful. Sorting is the method by which you can present data in order by selected field(s).

Note: The **Sorts** option is available for Contact Reports, Analysis Reports, and Other Reports. Sorting is not available for Calendar Printouts or Labels and Envelopes.

In the Reports Menu dialog box, highlight the report, then click **Report Sorts**.

The **Report Properties** dialog box appears. Select the **Sort Orders** tab.

The screenshot shows the 'Report Properties' dialog box with the 'Sort Orders' tab selected. The dialog has three tabs: 'Profile', 'Sort Orders', and 'Options'. The 'Sort Orders' tab contains the following elements:

- A folder icon and text: "Certain reports support up to three levels of sorting. For example, an Activity List report of appointments can be ordered first by State, then by City, and finally, by Company."
- Text: "Please select the Sort Level(s), Sort Table and Field Name, as well as the Start at/End at values for ordering the line items in the report below."
- A section titled 'Sort Levels' containing:
 - ☒ Primary Sort: Cal->Overtime (all)
 - ☐ Secondary Sort: (none)
 - ☐ Tertiary Sort: (none)
- Two dropdown menus: 'Sort Database:' (set to 'Cal') and 'Field Name:' (set to 'Overtime').
- Two text input fields: 'Start at:' and 'End at:'.
- A note at the bottom: "Sorting is required to prepare the data".
- 'OK' and 'Cancel' buttons at the bottom right.

GoldMine provides three levels of sorting for each report. For example, if you select **Company** as the first sort field, GoldMine orders all the records in the report alphabetically by company name. However, if you select **Zip** as the first sort field, GoldMine lists records by ZIP code.

You can select a second level of sorting for those records having the same primary sort field. For example, if you select **Company** for the Primary Sort, and the Secondary Sort is **Contact**, GoldMine first orders records by company name. When two records have the same company name, GoldMine sorts them alphabetically by contact name.

Tip:

GoldMine queries the database in the most efficient way available. If you set up a multilevel sort, or a single-level sort on a field not already indexed, GoldMine builds a report sort table. This additional step allows other users to access GoldMine data while the report is printing and also speeds the printing process.

When you select a Tertiary Sort field, GoldMine orders records by the third sort field when the first and second level sort fields are identical. For example, if the first and second-level sorts are **State** and **City**, and the third level sort is **Zip**, then GoldMine orders records by Zip entries only when two or more records have the same City and State values.

Note: Without a second- or third-level sort, GoldMine orders records with the same first-level sort values by the records' creation date and time. Listing records by entry order is known as the *natural order of records*.

Setting Up Data Sorting

To set up each sort level, you must select the database and field that GoldMine uses to order records. You can limit record selection by specifying a range of values.

The **Start at** field specifies the beginning value of a range defining record order within the selected sort level. The **End at** field specifies the end of the range. If the Start at field and the End at field are blank, **(all)** appears to the right of the sort level database and field, and GoldMine sorts all records in ascending order. For example:

- **Primary Sort: Contact1->Lastname (all)** indicates the first level sort is ordering all records by the Lastname field of the Contact1 database in alphabetical order. When you select a Start at value and an End at value, GoldMine displays **(range)** to the right of the sort level database and field. For example:
- **Primary Sort: Contact1->Lastname (range)** indicates the first level sort is ordering those records falling between the letters or partial words specified by the Start at value and End at value.

You can define a range with only a Start at value. The Start at entry specifies a beginning point from which GoldMine selects and orders records. The resulting report includes and orders records from the specified starting point to the implied end of the range. For example, if **Start at** contains 09/01/01, the report orders records by the selected field from September 1, 2001 to the current date.

The End at value specifies the end of a range within the selected sort level.

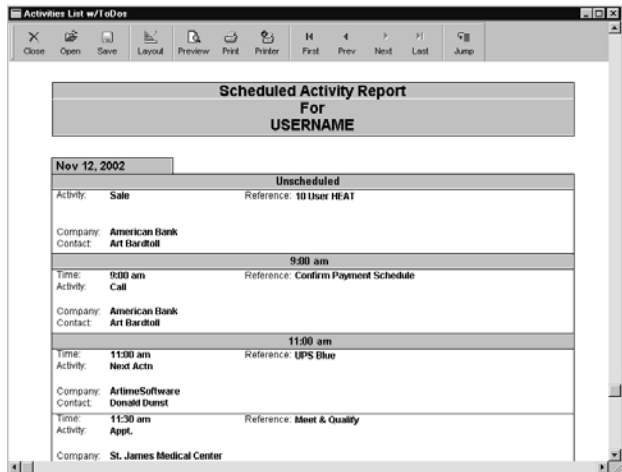
You can define a range with only an End at entry. The End at value specifies an ending point to which GoldMine selects and orders records. The resulting report includes and orders records from the earliest or smallest value through the End at value. For example, if End at contains M, the report orders records by the selected field from the beginning of the alphabet through records with field entries starting with M.

To save the sort settings for future printings, click **Save as Defaults**.

Displaying the Report

Displaying a report on your monitor is a convenient way to preview the report before printing a hard copy. Display the **Reports** Menu dialog box. Select **Window** in the **Output to** area, and then click **Print**.

The following image shows a sample display of the **Activities List w/ToDo**s as the report might appear on a monitor.



When your report appears, you can view details about it in the status bar including the total number of pages and the number of the currently displayed page.

The monitor display includes a special print preview toolbar providing buttons you can click to:

- Switch the display between full-page and full-size.
- Navigate through pages of the report.
- Print the report.
- Check printer settings.
- Save the report.
- Open the layout of the report.

Printing Reports

You can print reports from the new Report Center or by selecting **File>>Print a Report**. The new **Print Report** dialog box appears providing you with quick access to a preconfigured report based on Type, Category, and Report name without using the Report Center.

in this chapter...

- Understanding the Answer Wizard
- Working with the Answer Wizard
- Answer Wizard Report Categories
- Navigating the Wizard
- Working with Favorite Reports
- Running Reports

CHAPTER THIRTEEN

Using Answer Wizard

Overview

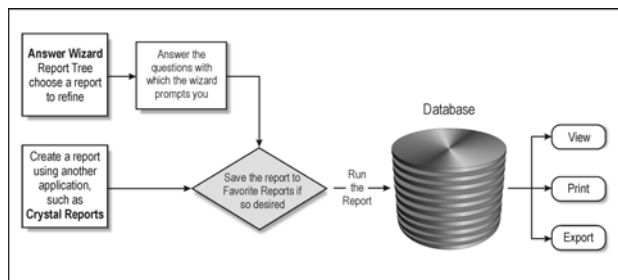
Answer Wizard is a special reporting tool that integrates with GoldMine Corporate Edition. Using Answer Wizard, you can generate detailed reports about the status of various business elements. Answer Wizard provides a set of standard reports designed to monitor specific issues. You can view, export, print, or save each report.

The Answer Wizard organizes all reports in a tree structure so reports are easy to locate and run. For added flexibility, users can organize and run customized reports created outside Answer Wizard in the Answer Wizard's Favorite Reports folder.

Note: You must have GoldMine Corporate Edition using an E-license installed on your system to use Answer Wizard. This tool is not available for installations of GoldMine using a D-license.

Understanding the Answer Wizard

Answer Wizard is a reporting tool that allows users to run detailed reports about company issues and trends. When you select a report from the Answer Wizard tree, the wizard prompts you to answer questions related to the output of your report, such as content parameters and printing options. In some cases, Answer Wizard prompts you to answer questions specific to the report such as date and time ranges, priorities, and so on. The wizard then runs these specifications against information in your database and returns the results. The following flowchart illustrates the basic Answer Wizard process.



Report Types

Answer Wizard works with two types of reports:

- **Answer Wizard Reports:** Answer Wizard provides a set of predefined reports. The reports are specially designed for sales and marketing activities. These reports are read-only and should not be directly modified; however, you can add or save Answer Wizard reports to your Favorite Reports folder where you can edit them.
- **Custom Reports:** Custom reports are created outside Answer Wizard with an application such as Crystal Reports. Once you create the reports, add them to the Favorite Reports folder so you can run them directly from Answer Wizard.

IMPORTANT: If you add a Custom report created using fields from a password-protected database, you may be prompted for the User ID and password for the database before the report can be output.

Working with the Answer Wizard

From the **Start** button on the Windows task bar, select **Programs>>GoldMine>>Answer Wizard**. Type your User ID and password, then click **OK**. The **Answer Wizard** main window appears.

Setting Answer Wizard Preferences

When you log on to Answer Wizard the first time, you are prompted for certain information.

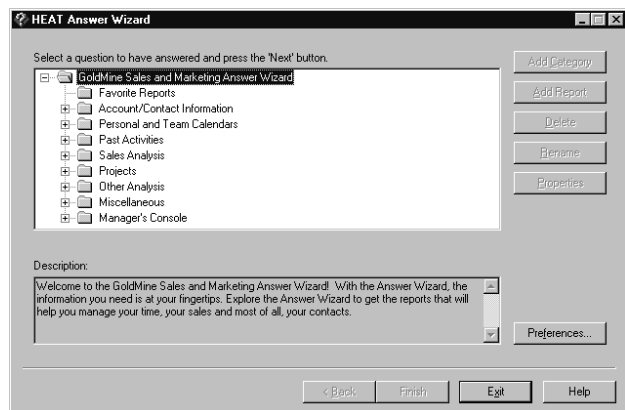
The **User Preferences** dialog box appears where you specify the GoldMine Data Source and the GoldMine ID and Password.

Tip:
After your initial log on, access these settings by clicking the Preferences button in the Answer Wizard main window.

Answer Wizard Main Window

The Answer Wizard main window houses the Answer Wizard Report tree, commands for working with Favorite Reports, and the Answer Wizard **Preferences** button.

Note: Answer Wizard reports and tree structures vary depending on the product/version installed and the data sources selected. Your tree may look different.



From the Answer Wizard main window, you can:

- View available reports.
- Run reports in the Answer Wizard Report tree.
- Add reports to Favorite Reports.
- Add categories to Favorite Reports.
- Rename favorite reports or categories.
- Edit favorite reports or categories.
- Delete favorite reports or categories.
- View properties of favorite reports or categories.
- Set Answer Wizard preferences.

The Answer Wizard Report tree is located in the Answer Wizard main window and houses the available reports. Branches comprise categories that help organize the Answer Wizard reports. The Favorite Reports folder appears at the top of the tree and organizes your custom reports.

To view reports contained in the Report tree, simply click the plus sign located next to the folder name to expand the tree. A brief description of the report is displayed at the bottom of the window.

Answer Wizard Report Categories

Depending on the installed applications, the Answer Wizard can work with reports for:

- GoldMine Corporate Edition using an E-license
- HEAT

The following sections provide descriptions of each of GoldMine report categories.

GoldMine Report Categories

GoldMine categories include:

- **Account/Contact Information:** Managing contact information is the core of any sales or marketing role. Whether you are tracking prospects, customers, or vendors, accessing this information when and how you need it is critical to effective relationship management.
- **Personal and Team Calendars:** Time management is fundamental to any role. Whether you are scheduling your own activities, delegating tasks to others, or coordinating with an entire team, tracking and organizing your schedule are critical for ensuring effective relationship management.
- **Past Activities:** Reviewing past activities allows you to get a summary of you or your team's progress, gather intelligence on specific events, and better plan future activities. Accessing historical information is fundamental to building lifelong customer relationships.

- **Sales Analysis:** Sales people spend a lot of their time calling, following up, and trying to get various tasks done. Sales managers spend much of their time trying to understand and measure what their sales people do. Often that means sales people have to stop selling to produce reports for management. Accessing timely and accurate sales information without generating increased administrative work loads for either the sales person or the sales manager is critical to a sales team's success. Having appropriate, timely information enables sales organizations to focus on selling and serving their customers building profitable and lasting relationships in the process.
- **Other Analysis:** Accessing timely and accurate reports on day-to-day activity information is critical to any team's success. With the appropriate information in hand, organizations can focus on improving work flow and internal processes to better serve their customers.

Navigating the Wizard

The Answer Wizard guides you through the process of generating reports. To navigate through the wizard, simply select a report in the Answer Wizard Report tree, answer the questions when prompted, then click **Next** to continue. To return to the previous dialog box, click **Back**. To return to the Answer Wizard main window, click **Start Over**. To cancel the process, click **Cancel**.

Answer Wizard questions vary according to the selected report. Typically, all reports prompt you to select detail parameters and printing options; however, some Answer Wizard reports prompt you to answer questions specific to the report. For example, some reports ask you to type the number of minimum hours or days to specify a time frame for your report; other reports request a customer identification number. These specifications help refine the data returned in the report.

Working with Favorite Reports

The Favorite Reports folder appears at the top of the Answer Wizard Report tree. You can use this folder to store commonly used reports so they can be found quickly and easily. Storing reports in the Favorite Reports folder also allows you to modify the report properties, such as names, descriptions, and report parameters.

The Favorite Reports folder can store:

- **Answer Wizard reports you use regularly:** You can add or save Answer Wizard reports to the Favorite Reports folder. Once they are stored in the Favorite Reports folder, you can modify their names, descriptions, and parameters without affecting the original report.
- **Custom reports:** Custom reports are created outside Answer Wizard with an application such as Crystal Reports. Once created, you can add them to Favorite Reports so you can run the reports directly from Answer Wizard.

Adding Categories to Favorite Reports

You can add categories to the Favorites Reports folder to further organize information within the folder. Added categories can contain additional categories and reports.

Adding Reports to Favorite Reports

You can add custom reports and Answer Wizard reports to the Favorite Reports folder so you can access them quickly and easily. You can also modify reports included in Favorite Reports (that is, you can edit names, descriptions, and parameters).

Saving Reports as Favorite Reports

Once you run an Answer Wizard report and select a print option, you can save the report to the Favorite Reports folder. Saving an Answer Wizard report under Favorite Reports allows you to quickly access the report. In addition, you can make changes to Favorite Reports, including the report name, description, and parameters.

Note: Answer Wizard reports are added to the Favorite Reports category from the **Save as Favorite Reports** dialog box. This dialog box appears automatically after you have run a report and completed one of the print options.

Editing Favorite Reports

You can modify the properties of any report or category stored within the Favorite Reports folder. Properties include report name, description, and report parameters.

Running Reports

The Answer Wizard guides you through the process of running a report by prompting you to select report specifications such as date ranges, detail parameters, and so on. The wizard then runs these specifications against information in your databases and displays the results on your monitor.

From the **Answer Wizard Report** tree, select the report you want to run and then click **Next**. The Answer Wizard prompts you to answer questions and select report specifications. Answer Wizard questions vary according to the report selected to run.

Answer the questions when prompted and then click **Next** to continue. After you set the report specifications, the **Print Options** dialog box appears. You can then select the method of generating your report.

Viewing, Printing, and Exporting Reports

After you set reporting specifications, you can set output options for the report. You can view, print, or export reports on your monitor.

IMPORTANT: If you run a custom report that was created using fields from a password-protected database, you may be prompted for the User ID and password for that database before the Answer Wizard can generate the report.



in this chapter...

- Taking Phone Messages
- Delegating Tasks
- Tracking User Activity
- Additional Tools for Working with Others



CHAPTER FOURTEEN

Working as a Team

Overview

During a typical day in the office, you probably communicate and work together with other members of your organization. GoldMine has the features to simplify a range of cooperative tasks, from taking telephone messages to coordinating an impromptu meeting. When you leave your desk, you can even use GoldMine to post a message about your whereabouts and the time you expect to return.

GoldMine provides tools for managers to assign work and track the activities of their staff members. Managers can use GoldMine to delegate tasks to others. They can also check an individual's availability and daily activity in GoldMine.

Tip:

If the message is critical, set an Alarm to alert the recipient of the incoming message.

Taking Phone Messages

You can take a message for another GoldMine user when the individual is unable to receive a telephone call or visit.

Display the record of the contact who wants to leave a message. Select **Contact>>Take a Phone Message**.

Using the **Take a Phone Message** dialog box, you can identify the contact, specify the user, take a detailed message, and set up an RSVP so you know when the user receives the message.

Sending Pager Messages

You can page a contact or another GoldMine user by sending a message either to a pager's phone number or an e-mail address.

Select **Contact>>Create E-mail>>Pager Message to Contact**.

Using the **Send a Pager Message** dialog box, you can select the current contact or a user, type a message, and send the information to a pager or to an Internet e-mail address.



See the online Help for information about defining the pager settings.

Replying to Messages

When you reply to a message, you send a response directly to the sender, and you also define the method of handling the message you received.

In the **Pending** tab of the contact's record, select the message. Right-click and select **Options>> Reply**.

Using the **Reply to an activity** dialog box, you can file the reply in history, delete, or retain in the inbox.

Tip:

You can reply to any activity recorded in GoldMine.

Completing Messages

When you complete a message, you can select a variety of options for responding to and handling the message.

Select the message in the **Pending** tab of the contact's record. Right-click and select **File It**.

Using the **Complete an E-mail** dialog box, you determine message handling and filing options, as well as whether to schedule a follow-up activity.

Delegating Tasks

You can use GoldMine to request action by other members of your organization. For example, you may want to request the Customer Service Department send literature to prospects. If you have the required authorization, you can view the other users' Calendars, check on their availability, schedule activities for others, and complete activities originally scheduled by other users.

Requesting Literature

If your company stocks brochures, price lists, and other types of printed materials, you can schedule an activity to send literature to your contacts.

Select **Schedule>>Literature Request**.

Tip:
The literature must be added to the Literature Fulfillment Center before a request can be submitted for that literature. For details on adding literature to the Literature Fulfillment Center, see the online Help.

Using the **Schedule a Literature Request** dialog box, set up your literature request by completing information in the following tabs:

- **Details:** Specifies the type of literature to send, method of delivery, date on which to send the literature, a code to assign to categorize the mailing, and any special instructions for sending the literature.
- **Group Schedule:** Sets up a mass mailing to multiple contacts, which eliminates the need to manually request the same literature for individual contacts.

Tip:
You can check the status of your literature request in the Literature Fulfillment Center. Select View>>Literature Fulfillment.

Checking Other Users' Schedules

GoldMine's Calendar provides a variety of methods to check the schedules of other users. You can select one or more users or user groups in the Calendar to display their scheduled activities in the **Day**, **Week**, or **Month** tabs. The **Planner** tab provides a general view of the user's commitments without displaying details.

Selecting Users

In the Calendar, select **Multiple Users** from the **User** drop-down list.

Using the **Select Users** dialog box, double-click on users in the User List and Groups in the Group List to display the names in the **Selected Users** list. When you click **OK**, all the selected user's scheduled activities are displayed in the Calendar.

You can view multiple users' schedules on the daily, weekly, monthly, planner, and outline calendars.

Tracking User Activity

The **Peg Board** tracks the login status and activity of individual users as well as system availability. For individual users, GoldMine tracks login/logout times, total logged time, and activity as determined by keystrokes and mouse use. When a user takes a break or must leave the office, that person can "log away," posting the current location and expected time of return.

Note: Any user with Master Rights can view a log listing login and logout data for all users in the **Time Clock** tab of the user name **Properties** dialog box.

Select **View>>Calendar**. Select the **Peg Board** tab.

A thumb tack shows the current, logged status of each user. Green thumb tacks indicate the user is currently logged in. Red thumb tacks indicate the user is logged out.

Tip:

You can schedule activities from the local menu of the Planner tab.

You can add or change the users listed in the Peg Board. Right-click to display the local menu, then select **User(s)**. The **Select Users** dialog box appears from which you can then select users or user groups.

To update the on screen display in the Peg Board, right-click and then select **Refresh**. By default, GoldMine updates the display after every minute. On GoldMine installations of more than 50 users, GoldMine updates the Peg Board every two minutes.

Note: GoldMine tracks a user's activity by keystrokes and mouse clicks. After a user stops working in GoldMine, a gauge shows the duration of inactivity in minutes.

Checking a User's Availability

In order for the Peg Board to maintain availability information for users, log away from GoldMine when you leave your desk using one of the following methods:

- **Peg Board:** Right-click and then select **Log Away**.
- **Main Menu:** Select **File>>Log Away**.

In the **I'm away from my desk** dialog box, you can post information about your location and expected time and date of return.

After you complete the information about your whereabouts, click either:

- **Logout** to exit GoldMine.
- **Wait for me** to minimize GoldMine until you return.

Additional Tools for Working with Others

GoldMine provides a variety of useful tools to enhance your activities with others. In addition to the features covered in this chapter, you can work with the operations listed below. To access these features, select the corresponding commands from GoldMine's Main Menu:

- To schedule an activity for other participants, select **Schedule** and then select the specific activity type; for example, select **Schedule>>Appointment** to schedule a meeting.
- To work with other team members on a large project, select **View>>Projects**.
- To check the latest information posted by your organization, select **View>>InfoCenter**.
- To update your contact database and Calendar by synchronizing with another GoldMine system, select **File>>Synchronize**, then select the synchronization method set up by your system administrator; for example, select **File>>Synchronize>>Synchronization Wizard**.



in this chapter...

Navigating the InfoCenter
Searching the InfoCenter



CHAPTER FIFTEEN

Sharing Information with the InfoCenter

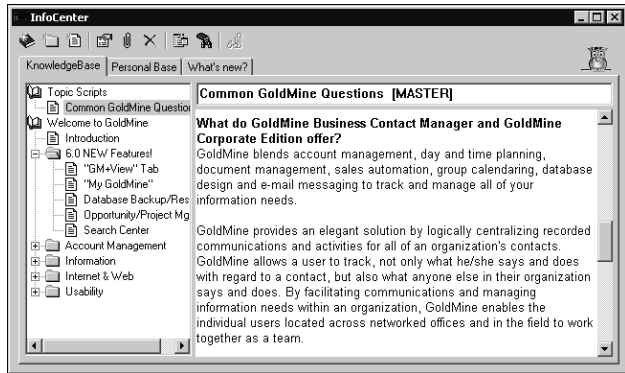
Overview

To stay current with important news in a dynamic environment, members of any organization need access to policies, price sheets, or technical information specific to their product or business. In addition, since individuals develop relationships as part of any job — and perhaps pursue off-hour activities — there is often a need to track “extracurricular” information as well.

The InfoCenter acts as GoldMine’s Marketing Encyclopedia System (MES). The InfoCenter provides a resource for maintaining any type of information useful to an organization or an individual. In addition to text files, the InfoCenter can archive graphics, multimedia files, and even software applications. Any of this information can then be linked to a Contact Record such that GoldMine displays the record automatically whenever you open the linked topic.

Navigating the InfoCenter

Select **View>>InfoCenter**. The **InfoCenter** appears.



The InfoCenter consists of three separate tabs:

- **KnowledgeBase:** Maintains information created by, for, and about an organization.
- **PersonalBase:** Maintains information useful to an individual user. Only that user can view and update.
- **What's new?** Presents topics added to the KnowledgeBase in reverse chronological order.

Working with the KnowledgeBase and PersonalBase

The **KnowledgeBase** tab and **PersonalBase** tab are identical systems designed to store different types of information. Organizations can use the KnowledgeBase to share information with their members. By granting access to topics on an as-needed basis, an organization can create a custom-information environment that responds to individuals' needs while maintaining data security.

Depending on the rights granted by the system administrator, all users can potentially view all topics in the KnowledgeBase. However, only users with Master Rights can add, edit, or delete items in the KnowledgeBase.

Individual users can use the PersonalBase to maintain personal information. Only the owning user can access his or her PersonalBase.

The KnowledgeBase and the PersonalBase organize topic pages that are items of related information, in a hierarchical structure similar to an outline format. The table of contents appears on the left side of the InfoCenter. There are three levels of information. Each level is represented by a symbol:

- **Book:** Contains all subsidiary folders and pages. Each book can contain up to five subsidiary levels. For example, a company may create an employee information book. The book could include topics such as a directory, benefits, policies, and so on. A book can contain either a table of contents, text, or an attached file.
- **Folder:** Contains one or more related folders and topics. A folder can contain text appearing on the right side of the dialog box, or an attached file.
- **Page:** Represents a topic. A page can contain text appearing on the right side of the dialog box or an attached file.

You can click the book or folder to open the section and display the contents. You can click a page to display the topic contents on the right side of the dialog box.

Working with What's New

The **What's new?** tab lets users quickly check for new information. GoldMine automatically adds topics to What's new? as users add the topics to the KnowledgeBase. This tab lists all KnowledgeBase topics in reverse chronological order. A user can view every topic to which read access rights are granted. A user with Master Rights can also open a topic from What's new? and work on the topic.



See the online Help instructions for creating and editing InfoCenter books, folders, and topics.

Tip:

GoldMine can display What's New automatically when you log on to GoldMine. Select Edit>>Preferences and click the Misc tab, then select Show What's New in the InfoCenter when logging in.

Tip:

The Search Results tab remains available throughout your work session in the InfoCenter.

Searching the InfoCenter

GoldMine provides a variety of options for searching the InfoCenter. In the **InfoCenter** toolbar, click the **Search** button.

Using the **Search** dialog box, you can type a search term and specify the search parameters. The results are displayed on the **Search Results** tab appearing after you execute the search.

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CHAPTER SIXTEEN

Synchronizing Data

Overview

Whether you are in the office or on the road, you can always keep your GoldMine contact and activity data up to date. Using GoldMine's synchronization feature, you can send, receive, or exchange updates with the following:

- Handheld computers (HPCs) and Personal Digital Assistants (PDAs) including Palm/Visor and Pocket PC
- Microsoft Outlook
- Undocked or remote GoldMine systems
- GoldSync Server

About Synchronization

During synchronization, changes to data made in your GoldMine contact database are compared to the data in another system. Data updates are based on the date and time of the latest change. When retrieved data is more recent than the data in the contact database, the contact database information is updated with the retrieved information. You can customize the changes incorporated during synchronization by selecting the types of data, date ranges, and other settings. For most types of synchronization, GoldMine automatically saves your settings as a profile when you start to synchronize.

Synchronization exchanges data through the creation, distribution, and retrieval of transfer sets. There are three stages:

- **Stage One:** The transfer set is created based on changes to the data since the specified date.
- **Stage One:** The systems connect and exchange data.
- **Stage One:** The retrieving system incorporates the updates into the databases.

The transfer set is a database of all the changes made to a contact database during a specified time frame. The transfer set does not contain every change ever made to a GoldMine database. The transfer set includes records changed since a specified cutoff date.

GoldMine tracks changes made to all fields (including user-defined fields), tabs, and lookups, on a field-by-field basis. GoldMine stores the date and time of the last modification to the fields. Depending on the capabilities of the other application or device, synchronizing can update contact data, your calendar, history, and supplemental data such as additional contacts, profiles, referrals, and linked documents. GoldSync can synchronize all data. If you are using GoldMine Standard with a D-license, you can purchase GoldSync as an add-on product; however, GoldSync is automatically included in GoldMine Corporate Edition using an E-license.

The retrieving device or application uses the data in this transfer set to update the resident database. During synchronization, records changed in one system are compared with the records in the other system. There are three possible conditions and responses:

- If the retrieved information was entered after the existing information, the system retrieves the information.
- If the retrieved information is older than the existing information, the system skips over the information.
- If the information has the same modified date, the system ignores the information.

The following scenario shows how synchronizing can help members of an organization work together more efficiently.

Synchronization Scenario

In most organizations, several departments track prospect and customer information. These departments are sometimes located at a distance from one another. For example, examine the different departments within the ABC Company supporting product sales.

ABC Company is a typical, medium-sized manufacturer employing about one hundred people. Like most companies, ABC Company has various departments handling sales, order processing, customer service, and support. Ideally, these departments work together to accomplish ABC's goals.

Whenever a prospect calls to inquire about ABC's products, the inside sales representative adds the prospect to the database, including name, address, telephone, how the prospect heard about ABC Company, and the products in which the prospect is interested.

The literature fulfillment department uses this information to send the requested product information to the prospect. Then they inform the outside sales representative of the date the information was sent.

The outside representative assigned to the prospect's territory generally follows up with a call to the customer a week or so after the product information was sent from the home office. Several subsequent, qualifying sales calls are made to secure the sale of an ABC product. During this period, the salesperson is responsible for updating ABC's sales management on sales activity including related calls and forecasts.

After a sale is completed, the accounting department generates an invoice the shipping department uses to fill the customer's order. If the customer fails to pay the invoice, the collections department sends a delinquent letter to the customer to indicate payment is due for the ABC product.

Meanwhile, the customer service department records the date the merchandise was received by the customer and initiates the warranty period. Then, when the customer requires support, the customer service department determines and notes the nature of the problem for future reference. If necessary, a follow-up support call is scheduled at the customer's location.

ABC Company's field technicians handle support calls. A field technician uses the customer information gathered by sales and customer service to locate a customer's office and to determine the nature of the problem. When the problem has been corrected, the technician creates a support record for future reference, then prepares an invoice based on whether the product is within its warranty period.

In this scenario, several employees access the same customer information at the same time, and, in some cases, these individuals work in locations that do not allow direct access to the office. The remote staff, such as the outside sales representatives and field technicians, need access to the same information available to inside ABC Company staff.

To share critical account information, they must be able to transfer this contact data between the office staff and the mobile staff. With synchronization, ABC Company is able to transfer sales leads to outside salespeople, send support requests to service technicians, and collect follow-up reports from staff in the field. Without remote synchronization, this information would probably have to be printed, sent by facsimile to the remote location, and re-entered into GoldMine by the salesperson or service technician. Synchronization can automatically send updated information to ensure timely, accurate communications for any organization with mobile or distributed personnel.

GoldMine provides options for synchronizing to meet a wide range of needs on a variety of systems. As described in the previous scenario, each department had specific overlapping information needs, but they were distinct from the needs of other departments. Synchronization can be set up to share the type of information needed by individuals to perform their duties and coordinate with others.

Important Terms

The following terms help explain synchronization.

Synchronization

A process that updates data between GoldMine systems, PDAs, or an application such as Microsoft Outlook.

Transfer Set

The database of all the changes made to a contact database during a specified time frame. The retrieving system uses the data in this transfer set to update the resident system's database. The retrieving system retains only data from the transfer set that is newer than the information contained in its own database.

Cutoff Date and Time

The cutoff is the date and time in the past representing the oldest update to be used and is the beginning point for adding data to the transfer set. By default, GoldMine only includes changes to the database since the date and time of the last transfer.

Synchronization Profile

Previously saved file containing the settings needed to create the transfer set, connect, and transfer the data. After a profile is saved, you can select the profile to start synchronizing immediately with the saved settings without working through the synchronization wizard.

Synchronizing with your Palm/Visor

Using GoldMine, you can synchronize data with your Palm/Visor. For versions of Palm/Visor prior to Palm VII, you must connect the device to your system to synchronize. GoldMine communicates with the desktop software that in turn communicates with the device; however, if you use a Palm VII, you can synchronize without a connection. For details, see your Palm VII documentation.

Select **File>>Synchronize>>Synchronize with Palm/Visor**.

Using the **GoldMine Palm/Visor Synchronization Wizard**, you can configure the send and retrieve options, install the conduit, set up the field mappings, select the records to synchronize, and save the settings as a profile so you can use it again in the future.

Saving Settings as a Profile

GoldMine saves the settings as a profile when you finish your entries and start to synchronize. Using a profile to synchronize is fast and convenient. If you define new settings or make changes to an existing profile, you can save multiple profiles.

Starting to Synchronize with Palm/Visor

After you click **Finish** in the GoldMine Palm/Visor Synchronization Wizard, a prompt asks you to click the **HotSync** button on the Palm cradle. The **HotSync** dialog box appears. To start synchronizing, click **Continue**. The **GoldMine Process Monitor** shows the progress of the synchronization.

Tip:

You can link activities and to-dos synchronized from your Palm/Visor to contacts in GoldMine. For details, see "Linking Activities from Palm/Visor to GoldMine Contacts" on page 16-8.

Tip:

For details about Palm/Visor data types and categories, see your Palm/Visor documentation.

Linking Activities from Palm/Visor to GoldMine Contacts

You can link activities and to-dos synchronized from your Palm/Visor to contacts in GoldMine.

This section discusses some of the more critical settings but does not explain all settings available in the **Advanced Options** dialog box.



For details about all of the available settings, see the online Help.

After you create the activity in your Palm/Visor, the cursor appears on a line next to the starting time. In the graffiti section, type a forward slash (/) which activates the Command entry feature, then type **L**. The **Phone Number Lookup** window appears.

Select the contact to whom you want to link the activity. Click **Add**. Palm/Visor displays the following on the **Notes** dialog box of the new activity:

<first name> <last name> <default phone number> <default field type>

The **<default field type>** character can be **W**, **H**, **F**, **O**, **E**, **M**, or **P**. For example, **W** represents "work." For details, see your Palm/Visor documentation.

To add text to the reference line, type a colon (:) in the graffiti area of the Palm/Visor, immediately after **<default field type>**. Any text you add after the colon appears in the Reference line of GoldMine without affecting the activity's link.

CAUTION: Do not change the line Palm/Visor displays on the **Notes** dialog box. Changing this line may result in incorrect synchronization.

Synchronizing with your Pocket PC

Using GoldMine, you can synchronize data with your hand-held computers (HPCs) and Personal Digital Assistants (PDAs). For most of these devices, you must connect the device to your system to synchronize. GoldMine communicates with the desktop software, which in turn communicates with the device.



If you use both Microsoft Outlook and a Microsoft Pocket PC, do not synchronize each application separately with GoldMine. Separate synchronization may result in duplicate data. Instead, first synchronize your Pocket PC with Outlook, then synchronize Outlook with GoldMine. For details about synchronizing a Pocket PC device with Outlook, see your Pocket PC documentation.

Select **File>>Synchronize>>Synchronize with Pocket PC**.

Using the **GoldMine Pocket PC Synchronization Wizard**, you can configure the field mappings, select the contact and calendar records, and save as a profile for future use.

Tip:

Notes do not synchronize from Pocket PC to GoldMine.

Tip:

If you want to clone a new profile based on an existing profile, select the profile, then click Next to continue through the GoldMine Pocket PC Synchronization Wizard and save the setting with a new profile name.

Synchronizing with Microsoft Outlook

Using GoldMine, you can synchronize data with Microsoft Outlook 98, Outlook 2000, and 2002 (XP). Outlook must be installed on the synchronizing workstation. GoldMine does not synchronize with Outlook 97.

Select **File>>Synchronize>>Synchronize with Outlook**.

Using the **GoldMine Outlook Synchronization Wizard**, you can define the sending and retrieving options, fields mappings, specify calendar data, and save as a profile for future use.

Synchronizing between GoldMine Systems

You can synchronize data between two GoldMine systems. Typically, you might want to use this method to exchange data with a remote or undocked GoldMine system.

To synchronize, each GoldMine system must:

- Have a unique serial number; however, a user working on a GoldMine network can create a GoldMine sublicense to work on an undocked basis on a laptop or home computer.



For details about creating an undocked sublicense, see the online Help.

- Work with the same database or a subset of the same database. To synchronize successfully, you must consolidate multiple contact databases prior to synchronizing.

Note: You must use the same version of GoldMine on all synchronizing systems.

Using the GoldMine Synchronization Wizard

You can define synchronization settings using the GoldMine Synchronization Wizard. There are two synchronization methods, connected and unconnected. The connected method uses IP to IP/Network and the unconnected method uses e-mail. These synchronization methods enable GoldMine and a remote system to communicate with each other and defines the type of information you are transferring.

This section discusses some of the more critical settings but does not explain all settings available in the wizard.



For details about all of the available settings, see the online Help.

Select **File>>Synchronize>>Synchronization Wizard**.

The **GoldMine Synchronization Wizard** appears.



Select one of the following:

- **Start a new session**
- **Sync using the settings of a Sync Profile**
- **Sync using the settings of a GoldSync Site** (only available if you have GoldSync installed)

If you select a sync profile or GoldSync site, you can look through the **Use the following profile settings** drop-down list to select a profile. If you do not need to change any of the profile settings, start to synchronize immediately by clicking **Finish**.

To define settings for your synchronization session, select **Start a new session**, then click **Next** to advance to the **Synchronization Wizard Connection Options** dialog box.

For direct synchronization, GoldMine uses your Internet connection. GoldMine also provides two methods of synchronizing requiring no connection between systems:

- Internet e-mail.
- Transfer set creation without transfer during the synchronization session.

Tip:

If you want to clone a new profile based on an existing profile, select the profile and then click Next to continue through the GoldMine Synchronization Wizard. You can change individual settings as needed. When you finish, you can either use the settings for one synchronization session, or save the settings with a new profile name.

Some of the specific options you can define for synchronization depend on the connection method you select. For example, if you select **Send a transfer set to remote by E-mail**, you must then supply the Internet e-mail address of the remote GoldMine system.

Selecting Contact Databases and Record Types

You can define the settings to determine the data to send and retrieve from the following:

- The contact database from which you want to send records and the database from which you want to retrieve records.
- The Contact and Calendar record types GoldMine sends and retrieves from the remote system.

Setting Synchronization Frequency and Period

If you synchronize with a remote system on a regular basis, you might want to set the synchronization frequency and period. The synchronization frequency sets the interval between synchronization sessions. The synchronization period schedules the day and time of synchronization.

Applying a Filter

You can use a filter as the basis for selecting Contact Records to send, and you can select another filter to use when retrieving records.

Selecting Records

You can select the Contact and Calendar records you want to synchronize. You can specify the contact, activity, and other Record Types. You can also select the Calendar records you want to send and retrieve.

Saving Settings as a Profile

Saving your settings as a profile when you finish your entries and start to synchronize is fast and convenient. If you define new settings or make changes to an existing profile, you can save multiple profiles.

Saving Logs of Synchronization Data

You can select options in the GoldMine Synchronization Wizard to record information about synchronization activities. GoldMine can record two types of data:

- **Details of each synchronization session:** Records information in either the Synchronization Snapshot or GoldMine's System Logs about the status of the current synchronization session in the GoldMine Process Monitor.
- **Details about records retrieved in a transfer set:** Records information in either the Synchronization Retrieval Logs or GoldMine's System Logs about the changes made to each record that was synchronized.

These logs provide useful information for troubleshooting. However, saving log data can consume a lot of disk space. Be sure to purge the logs periodically.

Tip:

This section discusses some of the more critical settings but does not explain all settings available in the wizard. For details about all of the available settings, see the online Help.

Synchronizing with a GoldSync Server

GoldSync is a GoldMine enhancement providing unattended and automated remote synchronization for two or more GoldMine systems. GoldSync remote synchronization offers a variety of significant operating benefits, including multilevel security and administrative controls, as well as enhanced flexibility over GoldMine's basic one-to-one remote synchronization.

While GoldSync licenses are included with GoldMine Corporate Edition, they can be added to your GoldMine Standard D-license. Contact your Solutions Partner for more information. To locate Partner in your area, go to www.frontrange.com.

GoldSync can simultaneously update multiple GoldMine systems with added or changed information in other GoldMine systems. Messages and Calendar updates can be sent automatically and simultaneously to as many users as are configured for the synchronization.

Although most users are not responsible for configuring or maintaining GoldSync, they may be required to synchronize their GoldMine with a GoldSync server. If so, they can use the GoldMine Synchronization Wizard to set up and run a GoldSync profile with settings provided by their GoldSync administrator.

Systems using GoldSync to synchronize enjoy the added convenience of **One-button Sync with GoldSync Server** synchronization. Users can employ click-and-go synchronization using a profile defined by the GoldSync administrator. In some cases, users can both install GoldMine and the One-button synchronization profile in one operation.

The following sections describe the simple setup and use of One-button synchronization by remote users.

Using One-button Synchronization to Update Data

If your organization uses GoldSync for synchronization, you may be able to enjoy the convenience of using One-button synchronization with the GoldSync Server.

To use One-button synchronization, a remote user must:

- Set up GoldMine to synchronize by the One-button profile.
- Run the One-button synchronization option.

Setting Up GoldMine for One-button Synchronization

The GoldSync system administrator must create a synchronization profile to set up a user for One-button synchronization. If the undocked user does not have GoldMine installed, the administrator can create a file that both installs GoldMine and sets up the One-button synchronization profile for the user. This installation package also includes a transfer set with base contact, Calendar, and other GoldMine data, including database structures, from the main GoldSync server.

Remote users who already use GoldMine do not have to reinstall GoldMine to set up One-button synchronization. The GoldSync system administrator can send the One-button profile as an e-mail attachment to existing GoldMine users.

The GoldSync administrator provides this installation package to the undocked user by CD-ROM, e-mail, or other another distribution method. If you have questions about the distribution method or contents of the installation package, contact your GoldSync administrator.

Tip:

See the online Help and the *Administrator Guide* for complete GoldSync configuration information.

Installing GoldMine with a One-button Synchronization Profile

Remote users can install GoldMine with the special installation file that includes the One-button synchronization profile and a transfer set:

To start the installation, double-click on the file that has a file name in the format Username.exe. For example, John Doe might receive the installation file JOHNDOE.exe.

Synchronizing with One-button Synchronization

An undocked, remote user can synchronize using the One-button method if the user has either:

- Installed GoldMine with a special One-button synchronization profile.
- Retrieved the One-button synchronization profile by e-mail.

After the One-button synchronization profile is added, you can run GoldMine's One-button synchronization. Select **File>>Synchronize>>One-button Sync with GoldSync Server**.

The **One-button Synchronization** dialog box appears.



To start synchronizing, click **Sync**. The GoldMine Process Monitor appears to detail the synchronization process.

Tip:

Username.exe includes the One-button synchronization profile and a transfer set of data. The data is automatically extracted from the transfer set during installation. After the installation, the undocked user can synchronize by selecting **File>>Synchronize>>One-button Sync with GoldSync Server**.

Additional Tools for Updating Data

GoldMine provides a variety of tools to update your data. In addition to the features covered in this chapter, you can work with the operations listed below. To access these features, select the corresponding commands from GoldMine's Main Menu:

- To import records from another database, even if created in another application, such as ACT!, select **Tools>>Import/Export Wizard>>Import Contact Records**.
- To reassign large sets of contacts and scheduled activities from one user to another by realigning territories, select **Tools>>Territory Realignment**.
- To consolidate duplicate records in a single database, select **Tools>>Merge/Purge Records**.

Glossary

A

action

An Automated Process task that GoldMine performs automatically based on the Automated Process' predefined condition or trigger.

active Contact Record

The Contact Record on which GoldMine-specific operations are performed.

activity information

Time-specific or event-based data about contacts such as calls, appointments, letters, and other activities, or about other types of activities such as scheduling routine tasks.

Activity List

Window that displays activities in a list format categorized in tab folders rather than the graphical format of the Calendar.

additional contact

Individual associated with the primary contact such as an administrative assistant. GoldMine stores this information in the Contacts tab of the primary Contact Record.

alert

Pop-up message that appears in GoldMine seven seconds after you display a Contact Record to which an alert was assigned. An alert warns you that the Contact Record has a special condition that may affect further activities with the contact.

Automated Processes

Set of defined workflow processes used to perform repetitive tasks. An Automated Process consists of a sequence of two or more events that are the step-by-step instructions GoldMine evaluates to perform a defined series of activities. Also known as a *track*.

B**Boolean expression**

Logical statement allowing one of two possible conditions – true or false. Each Boolean expression consists of a field, an operator, and value(s) that further define the true/false condition.

branching script

Flowchart-type question-and-answer framework often used as a survey or questionnaire to capture and/or deliver routine or repetitive contact information.

browse window

Special area in a window that lists entries such as names, calendar events, reports, and so on, in a column format. Many of the Contact tabs are browse windows.

C

Calendar

Window that graphically displays scheduled tasks or event information equivalent to information listed in the Activity List. GoldMine's Calendar displays information in a set of tabs that include daily, weekly, monthly, and annual views.

contact information

Fixed, basic data about contacts such as name, address, product interest, industry, or project affiliation; information can be categorized as statistical data or free-form data.

Contact Record

GoldMine's Contact Record incorporates standard information such as name, company, telephone number, and address. A Contact Record also serves as the basis for all scheduled work in GoldMine and acts as the central link between GoldMine's Calendar and history.

Contact Search Center

Window used to search for and retrieve Contact Records in the open Contact Set.

Contact Set

Database of Contact Records. GoldMine can maintain multiple Contact Sets, but a user can only open one Contact Set at a time.

custom screen

User-defined areas appearing under the Fields tab that users can customize to display information meeting their specific needs. Use the Screen Designer to place GoldMine and user-defined fields on the custom screens.

D**Document Management Center**

Window designed as a central location for managing document and e-mail templates.

Dynamic Data Exchange (DDE)

Windows' capability that enables applications, such as GoldMine, to exchange commands and information with other applications.

E**E-mail Center**

Window in which you can send, retrieve, and manage Internet e-mail. GoldMine automatically links the message to the Contact Record based on the e-mail address entry.

event

Step-by-step instructions contained in an Automated Process, or track, that GoldMine must evaluate to perform a specified series of activities. An event consists of an action and a trigger. An Automated Process consists of a sequence of two or more events.

F**F2 Lookup**

List of entries defined for a specific field such as Dept. The F2 Lookup for date fields is a graphical calendar, and the F2 Lookup for time fields is a graphical clock.

F2 Lookup arrow

Right-facing arrow located to the right of an entry field. Clicking the F2 Lookup arrow displays a pop-up menu of that field's lookup entries.

field

Unit of information contained in a record. For example, the Contact Record has fields for company, contact name, telephone number, and other information.

field views

Set of up to 999 user-defined fields maintained in the Fields tab of the Contact Record. GoldMine can maintain a maximum of 20 field views.

file code

Unique identification assigned to each Contact Set to enable synchronization between GoldMine systems. All systems using either the GoldMine Synchronization Wizard or GoldSync to synchronize must have matching file codes.

filter

Expression that sets up one or more conditions for selecting records to create a subset in a database. Filters are useful to create specific target audiences for marketing campaigns, special projects, and so on.

forecasted sale

Potential sale logged for tracking purposes and to help schedule follow-up activities. GoldMine allows potential sale information to be maintained in the same database that stores information about prospects.

free-form data

Observational or subjective category of contact information. For example, noting a contact's preference for morning meetings over afternoon meetings. This data can also be information that does not fit within an existing set of options or field entries such as the information entered for a contact in the Notes tab.

G**GM.ini**

Main GoldMine initialization file containing configuration settings that control GoldMine's appearance and operation. GM.ini file settings globally affect all users working from an installation of GoldMine.

GoldAlarm

Coordinated application that works when GoldMine is not running to notify users of scheduled activities that will start imminently, typically within the next 10 minutes. The Alarm option must be selected for an activity for GoldAlarm to work.

GoldMine Everywhere Web

Online version of GoldMine providing users with access to up-to-the-minute information at any time in virtually any place. Remote users can stay connected with their organization in real time whenever they go online.

GoldSync

Value-added enhancement for GoldMine's remote synchronization that automates the process of synchronizing multiple GoldMine systems over standard telephone lines, a network, or the Internet.

GoldSync Administration Center

Main GoldSync window in which synchronization settings can be created, edited, and maintained.

GoldSync process

Tasks performed by the GoldSync Server. Processes do the work of packing, sending, and retrieving the data. Each process can initiate multiple tasks. An example of a GoldSync process is to wait for an incoming connection through a network.

GoldSync Server

Any network computer on which GoldMine is installed and synchronization processes are run. You can have more than one GoldSync Server on a network.

GoldSync Synchronization Wizard

Synchronization configuration wizard that defines settings for initiating and exchanging data when synchronizing with another GoldMine system.

group

Fixed set of Contact Records meeting a set of conditions.

H

history

Chronological log of all completed activities related to a contact that can be viewed in the History tab.

host site

GoldMine system that accepts incoming connections from one or more remote sites.

I

indexed field

Field for which GoldMine maintains an index file. GoldMine maintains indexes on the following fields: Company, Contact, Last (name), Phone1, City, Zip, account no., and five user-defined key fields. Using an indexed field in a search locates a record almost immediately.

InfoCenter

Resource used to maintain and display any type of information useful to an organization or an individual. The InfoCenter can archive information in a variety of formats such as graphics, multimedia files, and program applications. Any of this information can be linked to a Contact Record.

.ini file

External text file that can add or change the appearance and/or operation of GoldMine or GoldSync. GoldMine automatically generates some .ini settings.

K**Key field**

One of five indexed fields designed to store critical, or key, information specific to an organization. These fields appear in the middle-right pane of every Contact Record.

KnowledgeBase

One of the resources available in the InfoCenter that an organization can maintain for access by multiple users. The KnowledgeBase can archive information in a variety of formats such as graphics, multimedia files, and program applications. Any of this information can be linked to a Contact Record.

L**linked document**

Associates almost any type of file with a Contact Record. You can link forms, graphics, incoming facsimile, voice-mail messages, or documents created with a word processor. Whenever you need to view or edit the linked file, GoldMine automatically loads both the application and associated file in one operation. You can connect external documents to a Contact Record through GoldMine's Links tab.

Literature Fulfillment Center

Window providing a central location for queueing printing requests, processing sales and marketing materials, as well as tracking previously sent literature.

local menu

Set of commands available in most browse windows that typically operates on a record selected in the browse window.

Lookup.ini

User-created file performing operations based on a trigger and a resulting action.

M

macro

Statement grouping together a series of commands and/or keystrokes into a one-step operation. A user often creates a macro to automate a sequence of frequently performed tasks. A GoldMine macro can be executed from either a toolbar icon or a keystroke.

Main Menu

Bar display located directly under the GoldMine title bar that organizes the first level of commands in functional groups such as File and Edit. Each functional group contains a pull-down menu of commands.

Master Rights

Users with Master Rights can access all of GoldMine's operations, regardless of any security settings. Master Rights users can grant access authority to other non-Master Rights users.


merge code

Code identifying primary and/or additional contacts to be merged with the selected template document. A Contact Record can be assigned multiple merge codes.

merge/purge

Method of consolidating information and deleting duplicate records from an open database. Using GoldMine's Merge/Purge Wizard, you can select records either on the criteria of a predefined profile or define your own criteria.

N**navigation buttons**

Buttons located in the top left corner of the Calendar that change the displayed time frame. Depending upon the Calendar view selected, clicking on one of the navigation buttons can display a range of dates falling one day, week, month, or year earlier or later than the selected date. Clicking on  returns the display to the current date.

O**One-button Synchronization**

Profile of settings allowing remote users to synchronize with a single click. The GoldMine administrator sets up a one-button sync profile for the remote user in the GoldSync Administration Center.

opportunity

Complex sale involving a group working as a team with multiple organizations and contacts. Use the Opportunity Manager to manage complex sales.

Organization Chart

Optional graphical view on the left side of the Contact Record that displays relationships and information. Using the Organization Chart, you can link individuals from different departments or positions within an organization, or link individuals from different organizations having a unique association of any kind.

P

pending activity

Activity scheduled with a contact. Pending activities appear on the Pending tab of the Contact Record.

Personal Base

Personal resource available in the InfoCenter. The Personal Base can archive information in a variety of formats such as graphics, multimedia files, and program applications. Any of this information can be linked to a Contact Record.

Personal Rolodex

Window designed to store personal contacts and telephone numbers without creating a full Contact Record.

preemptive events

All preemptive events within an Automated Process are evaluated for specific conditions each time a track is run.

primary contact information

Information in the upper portion of the Contact Record that includes the company name and the name of the primary contact at that company.

project

Long-term undertaking or production involving a team working to complete multiple component tasks. A project differs from an opportunity because the focus of a project is not on sales. Use the Project Manager to manage projects.

R

RecID

Unique identifier assigned to each record. This value is compared during synchronization to determine if there is a matching record in the respective database.

record curtaining

Method of controlling the amount of information displayed when a user other than the owner accesses the record.

RecType

Flag assigned by GoldMine to identify record types. All files have a RecType field; however, they are most commonly used in the ContSupp, Cal, and ContHist files/tables.

referral

Special record that creates a link between two Contact Records to facilitate tracking leads distributed to a sales channel.

remote site

GoldMine system that synchronizes with a host site. A remote site typically is an undocked user or branch office with a Sublicense.

remote synchronization

Data transfer process that updates a remote GoldMine or GoldSync system with new or changed information entered in another GoldMine or GoldSync system(s).

S**sequence number**

Assigned number that determines the order of events to be processed in an Automated Process. Each event in a track has its own sequence number. GoldMine processes events in sequential order processing the lower numbers before the higher numbers.

sequential events

Events processed in order until the conditions of the event cannot be met at which point no other sequential events are processed.

site code

Identifier limiting a process to only those sites with matching site codes. The site code is assigned to both the process and the site(s).

Site Group

Group of remote sites with similar settings for selecting the data to be synchronized, who will send/receive the data, how often the data will be synchronized, and the method for transporting the data. Site Groups are an organized way of configuring multiple sites.

Site Group member

A single site within a Site Group. Settings for an individual Site Group member can be unique to the site even if different from settings selected for other Site Group members.

status bar

Bar display located at the bottom of the GoldMine work area showing system-related information such as time, date, user, and the status of NUM lock and CAPS lock. A segment of the status bar can show a brief description of a highlighted menu command or a toolbar icon touched by the mouse pointer.

synchronization

Data transfer process that updates a GoldMine system with new or changed information entered in another system or device. GoldMine can synchronize with another GoldMine or GoldSync system, Microsoft Outlook Palm/Visor or a Pocket PC.

T**taskbar**

Optional display on the left side of the work area that can store customizable sets of GoldMine menu commands, macros, external applications, Internet sites, and documents for one-click access.

telemarketing script

Flowchart-type question-and-answer framework used as a survey or questionnaire to capture and/or deliver routine or repetitive contact information. Organizations can design telemarketing scripts as training tools for new employees or as guides for telemarketers or customer service representatives.

template

Boilerplate layout that contains standard entries, text, and/or information about formatting and merge fields for a form, letter, report, or record such as an opportunity template.

toolbar

Set of icons for one-click execution of frequently used commands such as creating a contact or sending e-mail. GoldMine has predefined toolbars.

topic script

Text-based scripts with a free-form format that is not organized in a flowchart layout like branching scripts or telemarketing scripts. Topic scripts are stored in the KnowledgeBase of the InfoCenter.

track

A set of defined work flow processes used to perform repetitive tasks. A track process consists of a sequence of two or more events which are the step-by-step instructions GoldMine evaluates to perform a defined series of activities.

transfer set

File created for synchronization made up of all the changes made in a GoldMine database during a specified time frame.

trigger

Predefined condition causing GoldMine to execute an action in an Automated Process.

U

undocked user

Remote/mobile GoldMine user. To work on an undocked basis, a user must have an undocked sublicense on the laptop or remote computer.

user

Individual authorized to log in and use GoldMine. Master Rights users can set up the access rights to GoldMine features and data for each individual user.

user group

Collection of users organized on the basis of some common feature such as by department or function.

Username.ini

File containing configuration settings controlling GoldMine's appearance and operation for an individual user. Each file has the user name assigned to the individual user, for example, John Doe's file would be johndoe.ini.

W

WebImport

GoldMine's capability to collect a variety of contact information from interested visitors to a Web site. System administrators can design Web import files providing the instructions for handling the data that is collected and fed into GoldMine.

wizard

Window-by-window procedure that simplifies a task such as importing data into GoldMine or deleting duplicate records.

work area

Middle area of the GoldMine window displaying open Contact Record(s), the Calendar, Activity List, and any other open windows.



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