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# About this Manual

The online Help, *Maintaining GoldMine*, *Synchronizing with GoldMine*, and *Integrating with GoldMine* provide the primary sources of information about GoldMine's features and functionality. These resources contain information about:

- Using GoldMine to automate your daily business activities.
- Configuring GoldMine to meet your organization's information and communications needs.
- Working with technical aspects of GoldMine, including GoldMine's data structure and organization, programming expressions, GoldMine's third-party program interface, and troubleshooting.

For procedures and technical information about setting up the GoldMine remote synchronization enhancement GoldSync, see the *GoldSync Administrator's Guide*. This guide is available exclusively as a .PDF file at the GoldMine Web site at <http://www.goldmine.com>.

The documentation contains references to some Windows-related functionality, such as explanations for basic mouse functions. However, detailed instructions for how to use Windows is beyond the scope of this manual. For more information about Windows, see your Windows 95/98/2000 documentation or related references.

## **Style Conventions used in this Manual**

*Maintaining GoldMine Sales and Marketing* uses special symbols and conventions, which are categorized as print conventions, general conventions, and mouse conventions in the following sections.

## Print Conventions

Print conventions used throughout this manual provide a consistent way of representing screen displays, command entries, and keyboard characters viewed while working with GoldMine.

**Screen Items** Menu items, dialog boxes, and field names are printed in a **bold typeface** similar to the typeface displayed in GoldMine onscreen displays. For example, the option to toggle the status bar display appears in print as **Status Bar**. In general, any text that appears on the screen is printed to look like the screen display.

**Command Entries** Commands or other keystroke strings entered by the user are printed in a monospaced typeface that shows exact spacing between terms.

**Keyboard Keys** References to keys on your PC keyboard are printed as graphic characters that match the actual keys on your keyboard. For example, the **Enter** key appears as . Commands that require combination keystrokes—that is, holding down one key while pressing another—are connected by a hyphen (-). For example, to access the **File** menu from your keyboard, press -.

**New Terms** New terms are printed in *bold italics*.



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Notes appear throughout the manual to provide additional information on a topic, such as indicating a procedure that must have been completed *before* performing the current procedure. Notes can also call attention to critical information or important technical details. These notes are identified by the light bulb symbol and delineated by borders.

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Online or print references are listed to provide additional information for topics.

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Cautions appear *before* procedures or other directions that can cause equipment or data damage *if not followed exactly as written*.

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## General Conventions

General conventions used throughout this manual provide a consistent way of referencing individual or multi-step actions.

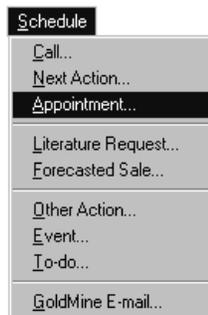
*Select* refers to executing commands that are available either as menu options, or as command buttons in a dialog box. For example, “select **OK**” indicates that you must click the **OK** button with the mouse. *Select* also refers to making a choice among available items from a browse window, drop-down list, radio buttons, etc.

Steps that involve two or more selections from a menu may be presented as a combination selection; that is, the menu options are presented in sequence, divided by |. For example, when you read

“To schedule an appointment, select **Schedule|Appointment**”

select **Schedule** on the Main Menu to display a drop-down list, from which you can select **Appointment**.

*Performing  
an action  
described in  
a procedure*



Select the **Appointment** command from the **Schedule** drop-down menu

## Mouse Conventions



If you use a multiple-button mouse with GoldMine, the left mouse button is configured as the primary mouse button. The right mouse button serves as the secondary button.

The following terms describe mouse actions referenced throughout this manual.

**Point** Position the mouse pointer until the tip of the pointer rests on the desired area of input on the screen, such as an option on a pull-down menu.

**Click** Press and immediately release the left mouse button without moving the mouse.

**Right-click** Press then immediately release the right mouse button without moving the mouse.

**Double-click** Click the left mouse button twice in rapid succession.

**Drag** Click and hold the left mouse button while moving the mouse pointer.

# Importing and Exporting Data

Sometimes you will want to use data created in one application, such as database files created by dBASE, with GoldMine, or you will want to use GoldMine data with another application, such as a spreadsheet. Reentering the information manually is impractical for large amounts of data. Instead, a simple procedure is needed to copy the data in a file format for a receiving application to read and use. *Importing* allows you to bring data from another application into GoldMine. *Exporting* allows you to copy GoldMine data into a file in a format that another application can incorporate and use.

You can use GoldMine's import/export to:

- Incorporate data into GoldMine from purchased mailing lists (import)
- Add contacts from another program (import)
- Capture data from a mainframe or an online data service (import)
- Perform analysis, using a spreadsheet program (export)

GoldMine provides an easy way to import and export records with the **Import Wizard** and the **Export Wizard**. Using these wizards, you can import or export data from CONTACT1 and CONTACT2 tables, and **E-mail Address** and **Web Site** field data from the CONTSUPP table. You can work with data using a predefined profile, or set up your own profile. For exporting data, you can set up a profile even if you don't have the export data. Newly created profiles can be saved for future use.

## **Working with Data Formats**

GoldMine can import data from, and export contact data to, a variety of file formats. Data purchased from mailing list houses, downloaded from an online database, or exported from another program can be imported directly into GoldMine. Contact data can also be exported for use with other programs, such as spreadsheets, databases and word processors. GoldMine supports three file formats:

- dBASE (DBF)
- ASCII (TXT)
- SDF (fixed-length records)
- SQL (import only)

Each of these formats is described briefly in the following sections.

### ***dBASE (DBF) Format***

To most easily identify a dBASE file, check for a file name with a .DBF extension, such as CONTACT1.DBF. A dBASE file identifies fields by name; for example, the **Company** field might be referenced as COMPANY, and the **Contact** field might be referenced as CONTACT. A dBASE file stores field names internally. The **GoldMine Import Wizard** displays a listing of the fields in a dBASE file.

### ***Delimited ASCII (TXT) Format***

The most commonly used file format is delimited ASCII format. When viewed with a word processor or text editor, data saved in a delimited format might look like this:

```
"ABC Company","John Smith","123 Main St.",  
"Anytown","CA","97021"
```

```
"Joe's Cleaners","Joe Turner","55 Third St.",  
"Burbank","CA","91502"
```

```
"Mr. T's Ribs","","22543 Eton Ave.", "New York","NY","10027"
```

Each field in the file is surrounded by a delimiter, which is usually the double-quote character ("). Adjacent fields are separated by a field separator, which is usually a comma (,). Each record is terminated by a carriage-return/line-feed combination. Carriage return or line feed characters cannot be embedded within the data.

A blank field's position in the record contains empty quotes, as shown in the second field in the third record. In the delimited ASCII format, fields are referred to by their position in the record. For example, in the above example, company name is field 1, contact name is field 2, etc.

### **Fixed Length (SDF) Format**

Many report generators have the ability to suppress the output of titles, headings and page numbers, to print only the report detail lines. In addition, many mailing list companies supply mailing lists in the SDF format, which is commonly used by mainframe computers. This format is referred to as a fixed length format. A sample of this type of format would look like this:

```
ABC Company      John Smith      123 Main Street
Joe's Cleaners   Joe Turner      55 First Street
Mr. T's Ribs     22543 Eaton Avenue
```

Each field has a fixed starting and ending position in the record. Regardless of the length of the fields before it, a particular field starts and ends in the same position in every record. Since each field is padded with spaces until the start of the next field, files employing this format are sometimes referred to as Space Delimited Files, or SDF files. Like the Delimited ASCII Format, each record is terminated by a carriage-return/line-feed combination.

Fields in the SDF format are referred to by starting and ending character positions. In the above example, the company name field occupies positions 1 through 16, contact name 17 through 28, and the address occupies positions 29 through 45.

### **SQL Format**

An SQL table is a type of relational database designed for use with a client/server architecture. At the most basic level, a relational database consists of tables that organize data in columns and rows. The following figure shows an example of a table in a relational database.

<i>Relational Database Table</i>	<b>Cust. ID</b>	<b>Company</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>ZIP Code</b>
	10010	Acme Products	1234 Main St.	Phoenix	AZ	85000
	10011	Garcia Pharmacy	705 Pacific Avenue	Long Beach	CA	90813
	10012	Fulton Widgets	315 Hillcrest Dr. #103	Thousand Oaks	CA	91321
	10013	Newton Beauty Supply	217 Angeleno Ave.	Burbank	CA	91502
	10014	Lady Day Distributors	1616 Johnson Dr.	Houston	TX	76098

The cell at any column/row can contain only one value. Columns and rows work together to define the type of information that a cell can contain.

### **Columns**

Each column contains values that provide information of one specific type, such as **City**, **Quantity**, or **Price**. One column – or a combination of columns – is identified as the *primary key*, which is the unique value by which each record can be identified. For example, in the preceding figure, the primary key might be the **Cust. ID** value for each record.

### **Rows**

Each row contains one record that consists of a set of column values. A table can contain as few as zero rows, or unlimited rows. SQL can retrieve data from tables by working with relationships represented by *common data values* between tables. A common data value is a value that is the same between multiple tables. For example, both a CUSTOMER table and an INVOICE table might contain **Cust. ID** values.

If the **Cust. ID** column is the primary key value for the CUSTOMER table, the **Cust. ID** column in the INVOICE table is known as the *foreign key*. A foreign key consists of one or more columns whose values match primary key value(s) in another table. The interaction of the primary key(s) and foreign key(s) are the basis of the “relationships” in a relational database. That is, a parent-child relationship exists between the primary key(s) and the foreign key(s).

## **Importing Data into GoldMine**

*Importing* allows you to bring data from other applications into GoldMine. Importing data is easy with GoldMine’s **Import Wizard**. A *wizard* provides a window-by-window procedure that simplifies a task. Using the **GoldMine Import Wizard**, you can bring records into GoldMine according to criteria in a predefined profile, or you can define your own profile.

To import records into GoldMine:

From the Main Menu, select **Tools|Import/Export Wizard|Import Contact Records**.

**GoldMine  
Import Wizard**



The **GoldMine Import Wizard** prompts you to select from the following options:

**Import a  
new file**

Displays *either*:

- **Import a New File** dialog box that identifies the import file for a DBF, ASCII, or SDF file

*or*

- **Import a New SQL Table** dialog box that identifies the import SQL table

GoldMine formats the incoming data according to a profile that will be created as you define settings in the **GoldMine Import Wizard**. You can save the new profile for future use.

**Import a new  
file using an  
existing profile**

Displays *either*:

- **Select File to Import** dialog box, from which you can select a predefined profile that GoldMine will use to format the incoming data

*or*

- **Importing an SQL Table using an Existing Profile** dialog box, from which you can select a predefined profile for importing an SQL table

**DBF file** Specifies that the incoming data is in the dBASE file format. Fields in a dBASE file are referred to by field name. For example, the **Company** field might be referred to as COMPANY, and the **Contact** field might be referred to as CONTACT. For details about .DBF files, see “dBASE (DBF) Format” on page 2.

**ASCII file** Specifies that the incoming data is in the delimited text file format. A delimited text file formats data with field delimiters, field separators, and record separators. In the delimited ASCII format, fields are referred to by their position in the record. For details about ASCII files, see “Delimited ASCII (TXT) Format” on page 2.

**SDF file** Specifies that the incoming data is in a text file with fixed-length record format, which is commonly used by mainframe computers. Fields in the SDF format are referred to by starting and ending character positions. For details about .SDF files, see “Fixed Length (SDF) Format” on page 3.

**SQL file** Specifies that the incoming data is from an SQL table, which is a type of relational database designed for use with a client/server architecture. For details about SQL and the client/server architecture, see the *GoldMine Front Office 2000 Administrator's Guide*.

When you have specified that you want to use a predefined profile or a new profile, and selected the data format for the file that you will import, select **Next>**.

If you selected **Import a New File**:

- For DBF, ASCII, or SDF—continue with “Importing a New File.”
- For SQL—go to “Importing a New SQL Table” on page 9.

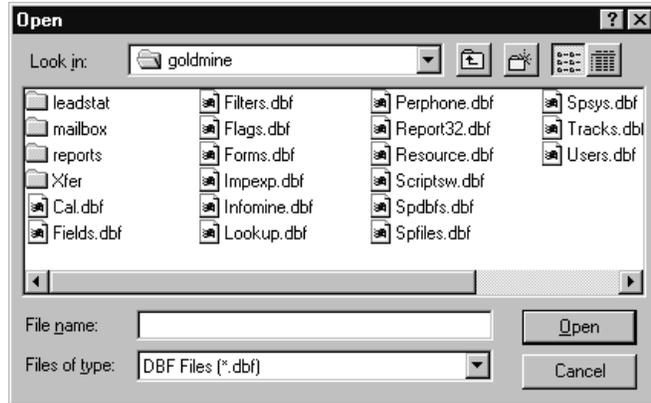
If you selected **Import a new file using an existing profile**:

- For DBF, ASCII, or SDF—go to “Importing a File using an Existing Profile” on the facing page.
- For SQL—go to “Importing a New SQL Table” on page 9.

## Importing a New File

If you selected **Import a new file** in the **GoldMine Import Wizard** window, the **Import a New file** dialog box appears. The **Import a New file** dialog box allows you to enter the path and name of the file to import. Type the path and name of the file that you want to import, *or*, to find the file, click **...**, which displays the **Open** dialog box.

*Open dialog box*



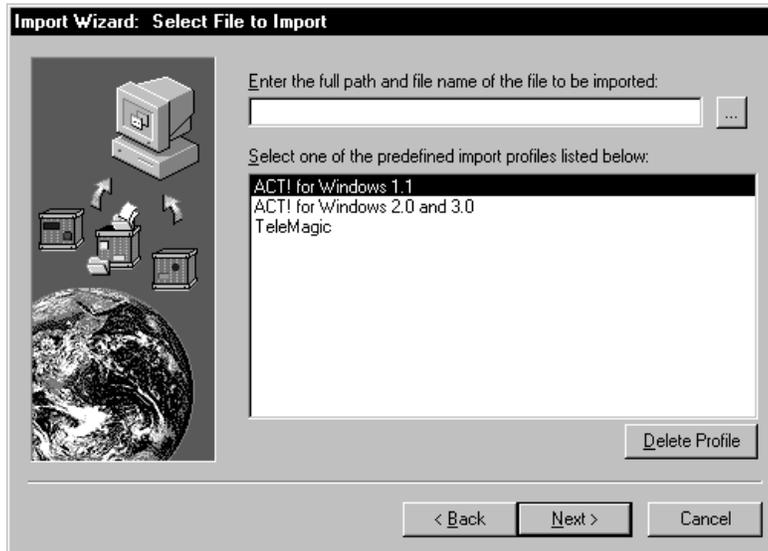
Navigate through directories as needed, then highlight the file that you want to import. Select **Open**. In the **Import a New file** dialog box, below the prompt **Enter the path and filename for the file to be imported**, the field contains the name of the selected file.

Select **Next>** to continue to the **Import File Profile** dialog box, as shown in the figure on page 13.

## Importing a File using an Existing Profile

If you selected **Import a file using an existing profile** in the **GoldMine Import Wizard** window, the **Select file to Import** dialog box appears.

**Import Wizard:  
Select File  
to Import  
dialog box**



The **Select File to Import** dialog box contains the following options:

**Enter the path  
and filename of  
the file to be  
imported**

Type the path and name of the file that you want to import, *or*, to find the file, click , which displays the **Open** dialog box, as shown in the figure on the facing page. In the **Open** dialog box, navigate through directories as needed, then highlight the file that you want to import. Select **OK** to enter the highlighted file name.

**Select one of  
the following,  
predefined DBF  
Import Profiles**

Specifies the predefined import profile that GoldMine will use to match fields from incoming data to fields in the contact database, and to format data. GoldMine provides profiles for commonly used applications, such as ACT!, Lotus Organizer (ASCII), TeleMagic (.DBF), Maximizer (ASCII), and SaleMaker (.SDF). Depending on the file format selected, any previously saved user-defined profiles also appear in this window.



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To import data from ACT! 4.x, you can select *either* of the ACT! For Windows options. You must also run ACT! During the import process, *and* open the ACT! Database that you want to import.

---

**Delete Profile** Deletes the highlighted import profile.

When done, select **Next>**. If you are importing a file from ACT! For Windows 2.0, the **Import ACT! Data** dialog box appears. Continue with “Importing Data from ACT!”

Otherwise, the **Import File Profile** dialog box appears. Go to “Previewing the Import File” on page 13.

### **Importing a New SQL Table**

If you selected **Import a new file** in the **GoldMine Import Wizard** for an **SQL file**, the **Import a New SQL Table** dialog box appears.

**Import Wizard:  
Import a New  
SQL Table  
dialog box**

Import Wizard: Import a New SQL Table

GoldMine allows you to create a new import profile if an existing profile is not available for your data file. Please select the SQL table to import.

Native Drivers  QDBC Drivers

MSSQL

Database: MSSQL\_GoldMine Database Owner:

Table:

< Back Next > Cancel

The **Import a New SQL Table** dialog box contains the following options:

**Native Drivers** Uses the built-in database driver provided by the Borland Database Engine (BDE).

**ODBC Drivers** Uses the ODBC Data Source Name that you configured to accept your data.

**Database** Selects the alias for the database in your respective SQL server from the drop-down list.

**Database  
Owner** Owner of the database in your SQL server. You must type the entry.

**Table** Name of the table that contains the data to be imported. For example, to import data from a GoldMine contact file, the entry for this field is CONTACT1.

When done, select **Next>**. The **Import File Profile** dialog box appears. Go to “Previewing the Import File” on page 13.

### ***Importing an SQL Table using an Existing Profile***

If you selected **Import a file using an existing profile** in the **GoldMine Import Wizard** for an SQL file, the **Select SQL Table to Import** dialog box appears.

The **Select SQL Table to Import** dialog box contains the following options:

**Select one of the predefined import profiles listed below** Specifies the predefined import profile that GoldMine will use to match fields from incoming data to fields in the contact database, and to format data.

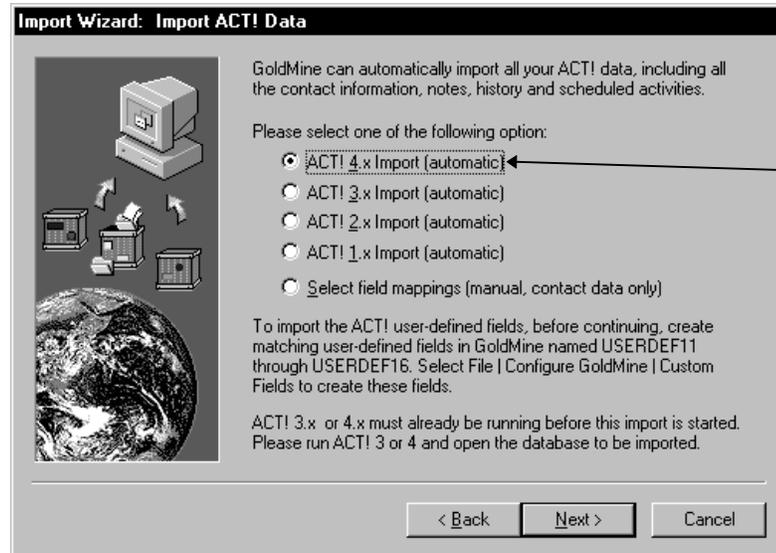
**Delete Profile** Deletes the highlighted import profile.

When done, select **Next>**. The **Import File Profile** dialog box appears. Go to “Previewing the Import File” on page 13.

## Importing Data from ACT! For Windows

GoldMine can automatically import all contact information, notes, history, and scheduled activity data from an ACT! For Windows 1.x, 2.x, 3.x, or 4.x file. When you select one of the ACT! Predefined import options from the **Select File to Import** dialog box, the **Import ACT! Data** dialog box appears.

**Import ACT!  
Data dialog box**



Select **ACT!  
4.x Import** to  
import ACT!  
4.0 data into  
GoldMine



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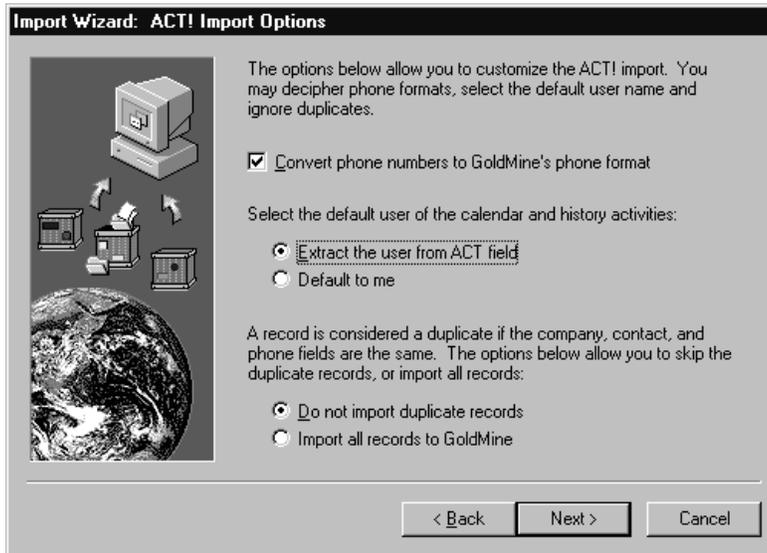
To import data from ACT! 3.x or 4.x, you must have ACT! Running during the import process, *and* open the ACT! Database that you want to import.

---

To retain complete control over the import process for *any* version of ACT!, select **Select field mappings (manual, contact data only)**, then select **Next>**. If you select this option, you can import only data from contact records. Continue with “Previewing the Import File” on page 13.

To continue with the automatic ACT! Import process, once you select the appropriate version of ACT!, select **Next>**.

**Import Wizard:  
ACT! Import  
Options  
dialog box**



The **ACT! Import Options** dialog box contains the following options:

**Convert phone numbers to GoldMine's phone format**

When Windows is set for the English language, GoldMine changes telephone numbers as needed to the format (999)999-9999.



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For details on telephone number formats, see "Formatting Telephone Numbers" in the online Help.

---

**Extract the user from ACT field**

Assigns calendar activities and history activities to the user designated in the ACT! Record.

**Default to me**

Assigns calendar activities and history activities to the logged user in GoldMine who is performing the import.

**Do not import duplicate records**

Does not import any record in which GoldMine detects duplicate data in the **Company**, **Contact**, and any **Phone** fields.

**Import all records to GoldMine** Will import all ACT! records, even those records in which GoldMine detects duplicate data in the **Company, Contact, and Phone** fields.

When done, select **Next>**. The **Ready to Import** window appears. When you are ready to start importing ACT! Data, select **Next>**. The **GoldMine Process Monitor** displays the progress of the import. Importing records from ACT! versions 3.0 or 4.0 may take considerable time because the import process relies on Dynamic Data Exchange (DDE), which runs slowly in ACT!

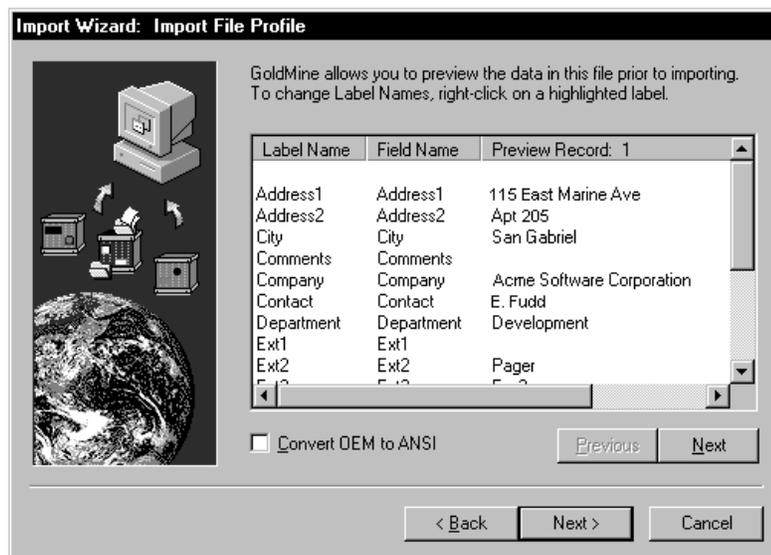
When done, the **GoldMine Process Monitor** shows detailed information about the import file.

When done viewing the import details, select **OK** to close the **GoldMine Process Monitor**.

### **Previewing the Import File**

In the **Import File Profile** dialog box, you can preview how GoldMine will import data from the selected file. The **Import File Profile** dialog box will differ slightly depending on the selected import file format. The figures shown in this section appear when importing dBASE (DBF) file formats.

**Import Wizard:  
Import File  
Profile  
dialog box**



The **Import File Profile** dialog box contains the following information and options:

**Label Name (DBF or TXT) Position (SDF)** Designation assigned to each field in the import file. An import label identifies each field in the import file so that the **Import Wizard** can correctly transfer the data into the corresponding GoldMine field.  
To change the label name (for example, to match the GoldMine field label), select the label name, then right-click. Select **Rename Label**. The **Import Label Definition** dialog box appears, from which you can enter a new label name.

**Field Name (DBF) Position (TXT) Range (SDF)** Name (DBF format), position (ASCII format that typically appears with a .TXT extension), or range (SDF) of the field in the contact database that GoldMine determines is a match for the incoming field identified in **Label Name**.

**Preview Record** Displays actual data from the selected import file.

**Convert OEM to ANSI** For international GoldMine users: changes OEM characters (European standard) into ANSI characters (US standard).

**Options (TXT or SDF only)** Appears on the **Import File Profile** dialog box for ASCII or SDF import *only*: GoldMine displays the **Import Profile Options** dialog box appropriate for the selected file type.

To set ASCII import options, see “Setting ASCII Import Options” on page 15.

To set SDF import options, see “Setting SDF Import Options” on page 16.

**Previous** Displays the record listed before the currently displayed record.

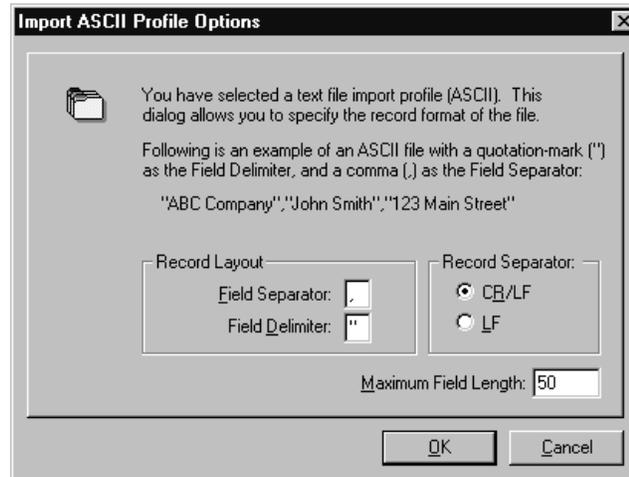
**Next** Displays the record listed after the currently displayed record.

When done, select **Next>**. The **Field Mappings** dialog box appears, as shown in the figure on page 17.

## Setting ASCII Import Options

If you are importing ASCII data, and selected **Options** in the **Import File Profile** dialog box, the **Import ASCII Profile Options** dialog box appears.

### Import ASCII Profile Options



The **Import ASCII Profile Options** dialog box contains the following options:

- Field Separator** Specifies the field separator character for ASCII delimited import files. The default character is the comma (,).
- Field Delimiter** Specifies the field delimiter character for ASCII delimited import files. The field delimiter surrounds each field. The default delimiter is the double-quote character (").
- Maximum Field Length** Specifies the uppermost size of any field in number of characters.
- CR/LF** Specifies that *either* a carriage return character *or* line feed character appears before the start of each record and at the end of each record; that is, records are separated from each other by a carriage return or a line feed.

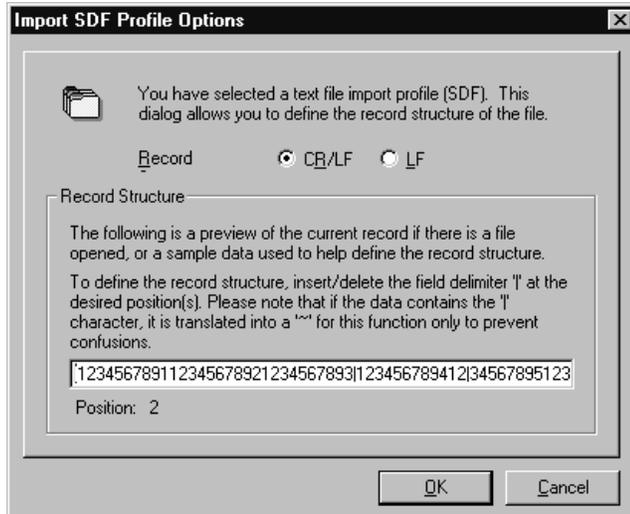
- LF** Specifies that a line feed character appears before the start of each record and at the end of each record; that is, records are separated from each other by line feed characters *only*.

When done, select **OK**. The **Import File Profile** dialog box appears.

### Setting SDF Import Options

If you are importing SDF data, and selected **Options** in the **Import File Profile** dialog box, the **Import SDF Profile Options** dialog box appears.

**Import Profile  
Options  
(SDF)**



Depending on the file type selected, the **Import SDF Profile Options** dialog box contains the following options:

- CR/LF** Specifies that *either* a carriage return character *or* line feed character appears before the start of each record and at the end of each record; that is, records are separated from each other by a carriage return or a line feed.
- LF** Specifies that a line feed character appears before the start of each record and at the end of each record; that is, records are separated from each other by line feed characters *only*.

**Record Structure** Displays a sample record from the import file. To define individual data fields in the import file, move the cursor to the desired position in the record, then insert or delete the field delimiter character as needed.

The number that appears after **Position** at the bottom of the window indicates the current cursor position in the sample import record *without* considering positions taken by previously set field delimiters. Use this information only in conjunction with the record definition sheet included with the import file.

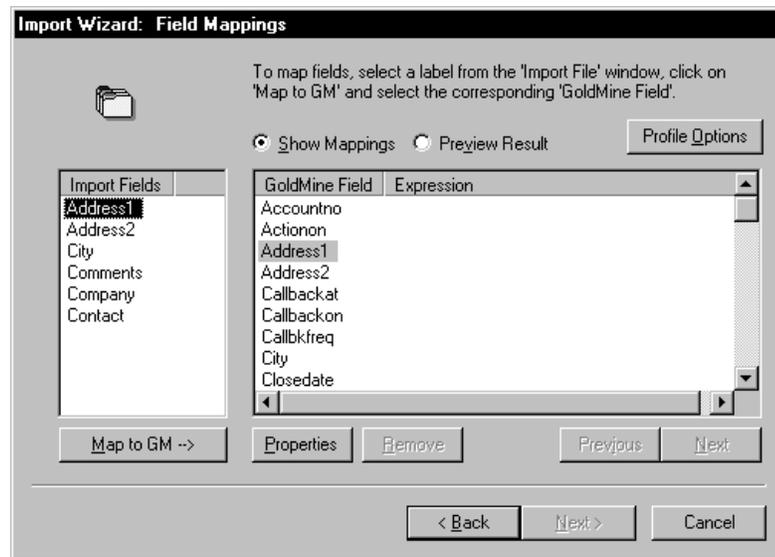
If the sample record does not display sufficient information for correct field definitions, select **OK** to return to the **Import File Profile**. Select another record, select **Options**, then try to define individual data fields again.

When done, select **OK**. The **Import File Profile** dialog box appears.

### Defining the Import File Structure

From the **Field Mappings** dialog box, you can set up a new import profile, or modify a selected import profile.

**Import Wizard:  
Field Mappings  
dialog box**



The **Field Mappings** dialog box displays the **Import Fields**, **GoldMine Field**, and *either* any expression(s) applied to the field(s), *or* sample values from a record in the import file. The **Field Mappings** dialog box contains the following information and options:

**Show Mappings** Displays the names of fields from the import file that are mapped to GoldMine fields. When this option is selected, this title appears in the **Expression** column.

**Preview Result** Displays values in mapped fields from a sample record in the import data file. To select individual records in the import database to preview how the record will actually look when imported, select *either* **Next** *or* **Previous**.

**Profile Options** Displays the **Import Profile Options** dialog box, from which you can specify an indexed field for GoldMine to search for duplicate data to reduce the likelihood of importing duplicate records – see “Setting Import Profile Options” on page 19.

**Map to GM** Translates data from a specified field in the import file into a form that corresponds to a specified GoldMine field. More than one import field can be selected for mapping into a GoldMine field. For example, you can map the **Title** field in the import file to *both* the **Title** field and the **Dear** field in the GoldMine contact database. See **Import Expression Builder** dialog box on the following page.

To map a field from the import file, highlight a field name listed in the **Import Fields** column, highlight a corresponding field listed in the **GoldMine Field** column, then select **Map to GM**. If **Show Mappings** is selected, the field name appears in the **Expression** column. If **Preview Result** is selected, the field value for the displayed record appears in the **Preview Record** column.

For example, if you highlight the **Zip** field in **Import Fields**, highlight the **Zip** field in **GoldMine Field**, then select **Map to GM**, GoldMine displays *either* **Zip** in the **Expression** column (**Show Mappings**), *or* an actual ZIP Code, such as **90000**, in the **Preview Record** column (**Preview Result**).

**Properties** Displays the **Import Expression Builder** dialog box – see “Creating an Import Expression” on page 19.

- Remove** Deletes mapping for the highlighted field in the **GoldMine Field** column, and the corresponding expression, if any.
  
- Previous** Available for **Preview Result** *only*: displays the record listed before the currently displayed record.
  
- Next** Available for **Preview Result** *only*: displays the record listed after the currently displayed record.

When done, select **Next>**.

If you selected a match field value from the **Import Profile Options** dialog box, the **Record Matching Options** dialog box appears. Continue with “Selecting Options for Matching Records” on page 23.

If you did *not* select a field value from the **Import Match** field, the **Save Profile** dialog box appears, as shown on page 25.

### Setting Import Profile Options

When you select **Profile Options** from the **Field Mappings** dialog box, the **Import Profile Options** dialog box appears.

**Import Profile Options dialog box**



The **Import Profile Options** dialog box is available only for GoldMine's indexed fields, and contains the following options:

**Select the match field to be used**

To search for duplicate record(s) based on a field value, select an indexed field from the drop-down list.

When you select **Next>** from **Field Mappings** dialog box, GoldMine displays the **Record Matching Options** dialog box, from which you can select an option that determines how GoldMine will treat records with the same value as the import field – see “Selecting Options for Matching Records” on page 23.

**Automatically updates GoldMine fields based on instructions in the [AutoUpdate] section of 'Lookup.ini'**

Automatically updates field values based on LOOKUP.INI. For details on working with the LOOKUP.INI file, see “Updating GoldMine Fields” on page 311.

**Attach the default Automated Process to these imported records**

Automatically attaches any Automated Process to each imported record *if Attach this process to all new contact records* has been selected for the Automated Process(es) in the **Process Properties** dialog box – see “Defining Process Properties” on page 182.

**Ignore first record in import file**

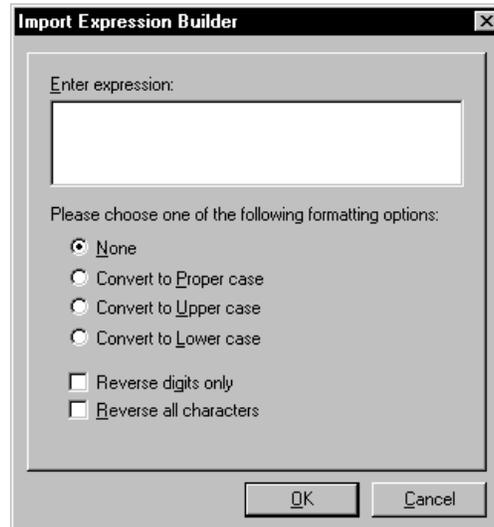
Bypasses the first record in the file to be imported. This option is available only when importing ASCII or .SDF files.

When you have selected the field, select **OK** to close the **Import Profile Options** dialog box.

## Creating an Import Expression

The **Import Expression Builder** allows you to place a custom expression into a GoldMine field.

*Import  
Expression  
Builder  
dialog box*



You can use the **Import Expression Builder** to create an expression that enters a specified value in a field, or which combines fields, and applies functions that format the incoming data in a special way, such as removing extra spaces when combining data from two import fields into one GoldMine field.

The **Import Expression Builder** allows you to combine multiple import fields into one GoldMine field. For example, if your import file has two fields for each contact's full name, a first name field and a last name field, you can combine these two fields and place the result in GoldMine's **Contact** field.

The **Import Expression Builder** dialog box contains the following options:

**Enter expression** Import expressions are built by selecting one or more **Import Fields** from the **Field Mappings** dialog box, combining the fields, and applying the desired functions to alter the string of characters. The resulting data item is then imported into the destination GoldMine field as a single import item.

Create an expression by adding any formatting functions that you want applied to field values. Commonly used formatting functions include:

- **LTRIM()**: removes leading spaces from the left side of a field value, which is useful to prevent extra spaces between items when joining fields together.
- **RTRIM()**: removes trailing spaces from the right side of a field value, which is useful to prevent extra spaces between items when joining fields together.
- **Trim()**: removes leading spaces and trailing spaces from a field value. For example, the expression `trim(Firstname) + " " + trim(Lastname)` will import the **Firstname** field and **Lastname** field from a data file into the GoldMine **Contact** field.
- **Substr()**: specifies a range of characters from an import field. For example, if the expression `substr(Company, 3, 4)` is applied to **Company**, the result is **mpan**.

Instead of an expression, you can enter specific text in a selected field by placing the text within quotation marks (“”). For example, “have a nice day” places the phrase `have a nice day` in the selected field.

**None** Applies *no* formatting options to the combined fields; that is, the data in the specified fields appears as originally entered.

**Convert to Proper case** Changes the first nonblank character after a space to upper-case, and the remaining characters to lower-case. For example, `MARY JANE` will change to `Mary Jane`.

**Convert to Upper case** Ensures that data appears in upper-case characters. For example, `Mary Jane` will change to `MARY JANE`.

**Convert to Lower case** Ensures that data appears in lower-case characters. For example, Mary Jane will change to mary jane.

**Reverse digits only** Reverses *only* numbers of imported data. For example, GoldMine will reverse only the street number of 123 Main Street, so the address becomes 321 Main Street.

**Reverse all characters** Reverses *all* alphanumeric characters of imported data. For example, GoldMine will reverse the name Sam to Ma s. This option is helpful when working with foreign languages such as Hebrew and Arabic.

Once you have set up the format to apply to the import data, select **OK** to close the **Import Expression Builder** dialog box, and return to the **Field Mappings** dialog box.

### Selecting Options for Matching Records

If you selected a match field value from the **Import Profile Options** dialog box, GoldMine will search the contact database for records with the same value as the import match field during the import process. You can specify how you want GoldMine to treat records marked as duplicates based on the selected match field.

**Record Matching Options dialog box**



The **Record Matching Options** dialog box contains the following options:

- Overwrite the existing GoldMine record** If a match is found, GoldMine updates the existing record with the information from the import record instead of adding a new record.
- Add a new record to GoldMine** If a match is found, GoldMine adds a new record instead of updating the existing record with the information from the import record.
- Do not import the record** If a match is found, GoldMine skips importing the record with matching information.
- Ask me what to do** GoldMine prompts you for a decision whenever finding a match.
- Import matching records only** GoldMine imports only records that contain the match field value selected in the **Import Profile Options** dialog box.
- Import empty fields** When GoldMine imports a record with a match field value but “blank values” in other key fields, the blank values in the imported record will *replace* entries in the existing record. Available only if you select **Overwrite the existing GoldMine record**.
- To avoid overwriting existing data in a record with empty fields, uncheck this option.

When done, select **Next>**. Continue with “Saving an Import Profile.”

## Saving an Import Profile

The **Save Profile** dialog box allows you to save your import settings as a profile that you can use in the future when importing data into GoldMine.

**Import Wizard:  
Save Profile  
dialog box**



If you are *either* creating a import profile, *or* modifying a predefined import profile, and you want to use the new profile in the future, select **Yes**.

If you select **Yes**, the **Save Profile** dialog box activates two options:

**Profile Name** Type a descriptive name for the new import profile.

**Save the import file with this profile** Keeps the profile name and import file name together, so that when using this profile to import data in the future, GoldMine looks for a new import file with the same file name on the same path.

When done, select **Next>**. The **Ready To Import** display appears.

When ready to start importing data, select **Finish**. To cancel the process at any time, select **Cancel**.

## Importing ZIP Codes into GoldMine

The ZIP Code Database is an add-on product used in conjunction with GoldMine.

With GoldMine and the ZIP Code Database, city and state names are automatically entered in the appropriate fields on the contact management screen when a valid ZIP Code is entered in the **Zip** field. This reduces the amount of data entry necessary, minimizing errors. The optional ZIP Code Database contains a compressed ZIP Code data file; GoldMine is required to import this ZIP Code data.

The volume of data contained in the ZIP Code file is very large, and importing the entire ZIP Code database can take several hours, depending on your computer's speed. However, you do not have to import the *entire* data file, since the data has been divided into 57 zones. You can import all ZIP Codes in the USA, all ZIP Codes in a specific time zone, or only the ZIP Codes of individual states. Table 2 lists the time zone codes and global code, the number of records in each zone, and the disk space required for each zone.

**Table 1.**  
ZIP Code  
Database  
Contents

Code	Description	Primary City		All Cities	
		Recs.	Size	Recs.	Size
US	Entire USA	42,667	4.7 MB	75,859	8.5 MB
EZ	Eastern Time Zone	8,862	2.1 MB	33,854	3.8 MB
CZ	Central Time Zone	16,383	1.8 MB	28,956	3.2 MB
MZ	Mountain Time Zone	2,827	315 K	5,199	580 K
PZ	Pacific Time Zone	4,549	510 K	7,782	865 K

New York (NY), the state with the most ZIP Codes, requires 550K of disk space. Rhode Island (RI), the state with fewest ZIP Codes requires 12K of disk space.



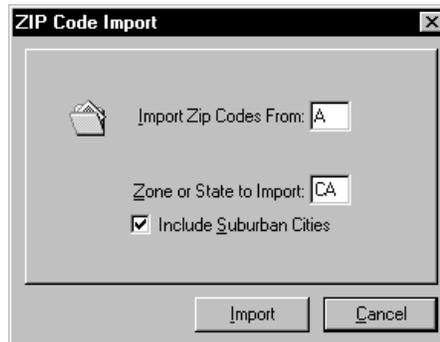
---

Importing the ZIP Codes to a network drive requires the exclusive use of the ZIP Code database; therefore, no other user can be working in GoldMine. Note that the user performing the import *must* have the following network security rights in the GoldMine directory: Open, Create, Read, Write, Delete and Rename.

---

To import GoldMine's ZIP Code database, select **Tools|Import/Export Wizard|Import ZIP Codes**.

**ZIP Code Import dialog box**



The **ZIP Code Import** dialog box contains the following options:

**Import Zip Codes From** Type the letter of the drive containing the ZIP Code data file. For example, if you are importing ZIP Codes from a file on diskette, type the letter of the disk drive, such as A.

**Zone or State to Import** Type the identification code of the state or ZIP Code zone that you desire to import in the **Zone or State to Import** field. For example, to import ZIP Codes for California, type CA.

**Include Suburban Cities** Check this box to import all cities. To import only the primary city of each ZIP Code, leave the check box blank.  
Some ZIP Codes include not only the primary city, but also suburban cities and towns. You can import all cities, or only the primary city of each ZIP Code. If you import all city names, a situation can occur where a ZIP Code has more than one matching city. If this is true for an entered ZIP Code, GoldMine displays a dialog box allowing you to select the appropriate city.

Select **Import** to begin importing ZIP Codes. During processing, the **ZipCode Import** status window appears. The **ZipCode Import** status window contains the following information:

**Import Zone** ZIP Code zone being imported.

**File Size** Amount of disk space that will be consumed when the import is completed.

**Build Size** Minimum amount of free disk space required to perform the import process. Because GoldMine builds a temporary file that is later deleted, the import process requires more free disk space than the resulting ZIP Code database.

Prior to adding ZIP Codes, the import process marks as deleted any ZIP Codes present in the current ZIP Code database that belong in the zone being imported. This ensures that the correct city and state are matched with each ZIP Code in the database. The ZIP Codes are then imported into the ZIP Code database and the file is indexed.

## ***Exporting Data from GoldMine***

*Exporting* allows you to copy data into a file in a format that the receiving application can understand. Exporting data is easy with GoldMine's **Export Wizard**. A *wizard* provides a window-by-window procedure that simplifies a task. Using the **GoldMine Export Wizard**, you can create a data file from GoldMine records according to criteria in a predefined profile, or define your own profile. The currently selected contact record determines the contact database from which GoldMine will export.

GoldMine can export data in three formats:

- dBASE (DBF)
- ASCII (TXT)
- SDF (fixed-length records)

For details about each of the formats, see "Working with Data Formats" on page 2.

To export data from GoldMine:

From the Main Menu, select **T**ools|**I**mport/Export Wizard | **E**xport Contact Records.

**GoldMine Export Wizard**



The **GoldMine Export Wizard** contains the following options:

**Export to a new file** Displays the **Field Mappings** window, as shown in the figure on page 33. GoldMine will export the data according to a profile that will be created as you define settings in the **GoldMine Export Wizard**. You can save the new profile for future use.

**Export to a new file using an existing profile** Displays the **Select Export Profile** dialog box from which you can select a predefined profile that GoldMine will use to format the data for export.

**DBF file** Specifies that data will be exported in the dBASE file format. Fields in a dBASE file are referred to by field name. For example, the reference for the **Company** field might be COMPANY, and the reference for the **Contact** field might be CONTACT. For details about .DBF files, see “dBASE (DBF) Format” on page 2.

**ASCII file** Specifies that data will be exported in delimited text file format. A delimited text file formats data with field delimiters, field separators, and record separators. In the delimited ASCII format, fields are referred to by their position in the record. For details about ASCII files, see “Delimited ASCII (TXT) Format” on page 2.

**SDF file** Specifies that data will be exported to a text file with fixed-length record format, which is commonly used by mainframe computers. Fields in the SDF format are referred to by starting and ending character positions. For details about .SDF files, see “Fixed Length (SDF) Format” on page 3.

Once you have specified whether you want to use a predefined profile or a new profile, and you have selected the data format for the export file, select **Next>**.

If you are exporting to a new file, the **Select Filter/Group** dialog box appears. Go to “Using a Filter or Group to Select Records for Export” on page 31.

If not, you must select a profile to define the format for the exported data. Continue with “Exporting Data using an Existing Profile.”

## Exporting Data using an Existing Profile

If you selected **Export to a file using an existing profile**, the **Select Export Profile** dialog box appears.

**Export Wizard:  
Select Export  
Profile  
dialog box**



The **Select Export Profile** dialog box contains the following options:

**Select one of  
the following  
predefined  
Export Profiles**

Specifies the predefined profiles for GoldMine to use to format data for export. The window displays all available profiles for the selected data format; that is for DBF, ASCII, or SDF data.

**Delete Profile**

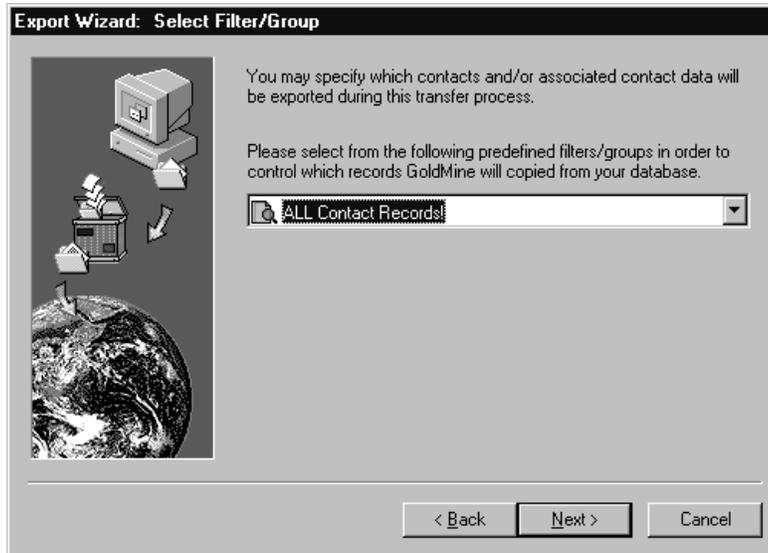
Deletes the highlighted export profile.

When done, select **Next>**. The **Select Filter/Group** dialog box appears.

## Using a Filter or Group to Select Records for Export

When you advance after selecting **Export to a new file** from the first wizard screen *or* from the **Select Export Profile** dialog box, the **Select Filter/Group** dialog box appears. You can export all contact records, or apply an existing filter or group to export a set of contacts to export from the contact database.

**Export Wizard:**  
**Select**  
**Filter/Group**  
**dialog box**



You can select the contact records to export from the drop-down list. The list contains the following options for selecting records:

- **ALL Contact Records!**
- **Recently activated filters or groups**
- **Filters** of a selected user
- **Groups** of a selected user

To display the filters or groups of another user, click on the **<Filters of: USER NAME. . .>** or **<Groups of: USER NAME. . .>** entry in the drop-down list. The **Select a User** dialog box appears, from which you can select another name.

When done, select **Next>**. The **Field Mappings** dialog box appears.

## Defining the Export File Structure

The **Field Mappings** dialog box allows you to set up a new export profile, or to modify a selected export profile.

**Export Wizard:  
Field Mappings  
dialog box**



The **Field Mappings** dialog box displays the **GoldMine Fields**, the export **Field Name**, and *either* any expression(s) applied to the field(s), *or* sample values from a record in the import file.

The **Field Mappings** dialog box contains the following information and options:

- Convert ANSI to OEM** For international GoldMine users: changes ANSI characters (US standard) to OEM characters (European standard).
- Show Mappings** Displays the names of fields from the export file that are mapped to GoldMine fields. When this option is selected, this title appears in the **Expression** column.
- Preview Result** Displays values in mapped fields from a sample record in the export data file. To preview individual records, select *either* **Previous** or **Next**.

**Options (TXT or SDF only)** Appears on the **Export File Profile** dialog box for ASCII or SDF import *only*: GoldMine displays the **Export Profile Options** dialog box appropriate for the selected file type.

To set export options, see “Setting Export Options” on page 37.

**GoldMine Fields** Names of the fields in the GoldMine contact database.

**Field Name (DBF)** Name (DBF format), position (ASCII), or range (SDF) of the field in the contact database that GoldMine determines is a match for the field identified in **GoldMine Fields**.  
**Position (TXT)**  
**Range (SDF)**

**Expression Preview Record** If **Show Mappings** is selected, the **Expression** column displays one of the following:

- Label that GoldMine exported to identify the field
- Expression that GoldMine applied to data being exported from the GoldMine field

If **Preview Result** is selected, the **Preview Record** column displays actual data from the currently selected record.

**Add Field** Includes a contact field listed in the **GoldMine Fields** column in the export profile. GoldMine allows you to combine, or concatenate, several GoldMine fields into a single data item for export. For example, the expression `trim(phone1) + “ “ + trim(ext1)` will combine both the **Phone1** field and the **Ext1** field into a single data item and export that data.

To add field(s) from the GoldMine contact set, highlight one or more field names listed in the **GoldMine Fields** column, then select **Add Field**. The selected field(s) appears in alphabetical order in the **Field Name** column.

**Edit Expr** Displays the **Export Mapping Setting** dialog box, as shown in the following figure, in which you can create a custom field definition for the export data file.

**Export Mapping  
Setting  
dialog box**



The **Export Mapping Setting** dialog box contains the following options:

**Field Name (DBF)** For a DBF file, **Field Name** of the field that appears in the export file. When two fields have been combined, the resulting field name appears as the first field of the combination. You may want to change this field name to better represent the new field. For example, if you combine **Phone1** and **Ext1** to create a single **Phone** field, you might want to change the field name to **Phone**.

For an ASCII file, **Position** of the field that appears in the export file.

For an SDF file, **Range** of the field that appears in the export file.

**Field Size** Available for DBF format and ASCII format *only*: Sets the maximum length of the field in the export file.

**Enter expression** Export expressions are built by selecting one or more **GoldMine Fields** from the **Field Mappings** window, combining the fields, and/or applying the desired functions to alter the string of characters. The resulting data item is then exported into the destination export field as a single export item.

You can also format the resulting field values. Commonly used formatting functions include:

- **Ltrim()**: removes leading spaces from the left side of a field value, which is useful to prevent extra spaces between items when joining fields together.
- **RTrim()**: removes trailing spaces from the right side of a field value, which is useful to prevent extra spaces between items when joining fields together.
- **Trim()**: removes leading spaces and trailing spaces from a field value.
- **Substr()**: specifies a range of characters from a field. For example, if the expression `substr(Company, 3, 4)` is applied to **Company**, the result is **mpan**.

Instead of an expression, you can enter specific text in a selected field by placing the text within quotation marks (“”). For example, “have a nice day” places the phrase `have a nice day` in the selected field.

When you have specified formatting that you want applied to export data, select **OK** to close the **Export Mapping Setting** dialog box, and return to the **Field Mappings** window.

**Remove** Deletes mapping for the highlighted field in the **Field Name** column, and the corresponding expression, if any.

**Previous** Available for **Preview Result** *only*: displays the record listed before the currently displayed record.

**Next** Available for **Preview Result** *only*: displays the record listed after the currently displayed record.

When done, select **Next>**. The **Get Filename** dialog box appears, from which you can designate the destination and name for the export file.

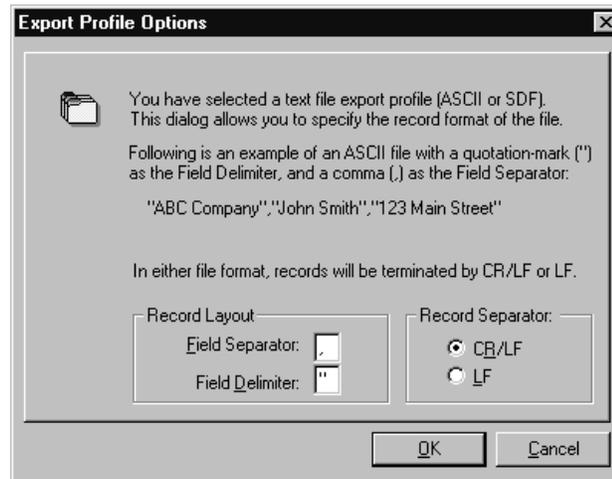
Navigate through directories as needed, then highlight the file that you want to overwrite with the export data. Select **Open**. In the **Get Filename** dialog box, the selected path and file name appears below the prompt **Enter the path and filename for the file to be exported**. GoldMine will overwrite the selected file when you select **Finish** to execute the export process according to the specifications defined by the **Export** wizard.

Select **Next>** to continue to the **Get Filename** dialog box, as shown in the figure on page 38.

### Setting Export Options

If you are exporting to an ASCII file, and selected **Options** in the **Export File Profile** dialog box, the **Export Profile Options** dialog box appears.

*Export Profile Options dialog box*



The **Export Profile Options** dialog box contains the following options:

**Field Separator (ASCII only)** Specifies the field separator character for ASCII delimited files. The default character is the comma (,).

**Field Delimiter (ASCII only)** Specifies the field delimiter character for ASCII delimited files. The field delimiter surrounds each field. The default delimiter is the double-quote character (").

**CR/LF** Specifies that *either* a carriage return character *or* line feed character appears before the start of each record and at the end of each record; that is, records are separated from each other by a carriage return or a line feed.

**LF** Specifies that a line feed character appears before the start of each record and at the end of each record; that is, records are separated from each other by line feed characters *only*.

When done, select **OK** to close the **Export File Options** dialog box.

### **Naming your Export File**

When you advance from the **Field Mappings** dialog box, the **Get Filename** dialog box appears.

**Get Filename dialog box**

**Export Wizard: Get Filename**

Please enter the destination export file. This field is optional. If this field is left blank, you have the option to save this profile, but GoldMine will not export any data.

Enter the full path and filename of the destination file:

...

For ASCII or SDF format, you have the following option on the first record being exported.

Export GoldMine field names that has mappings as first record

< Back   Next >   Cancel

The **Get Filename** dialog box contains the following option:

**Enter the full path and filename of the destination file**

Path and file name where you want to place the newly created export file.

To create a export profile without actually exporting data, leave this field blank.

To export data into the file, type the path and name of the file to which you want to export data, *or*, to overwrite an existing data file, click . The **Open** dialog box appears, as shown on page 7. Select the file that you want to overwrite.

**Export GoldMine field names that have mappings as first record**

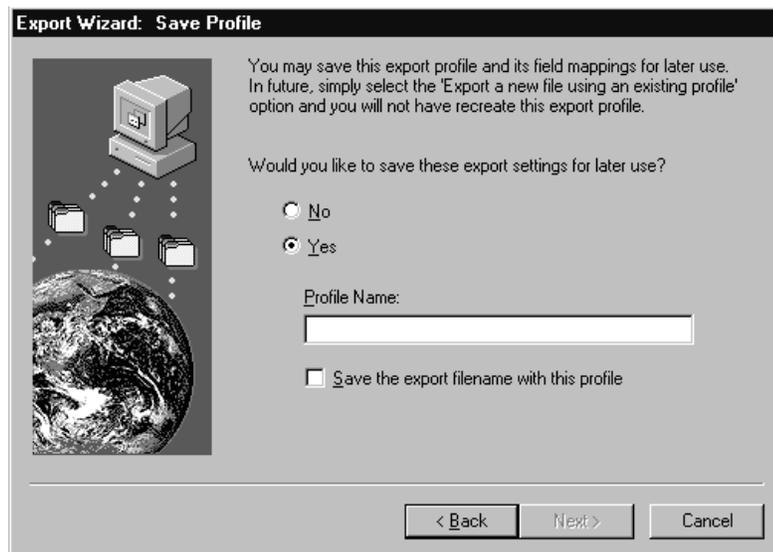
GoldMine exports the first record with fields that correspond to defined mappings. This option is available *only* when you are exporting records to an ASCII or .SDF file.

When done, select **Next>**. The **Save Profile** dialog box appears, as shown below.

### **Saving an Export Profile**

The **Save Profile** dialog box allows you to save your export settings as a profile that you can use when exporting GoldMine data in the future.

**Export Wizard:  
Save Profile  
dialog box**



If you are *either* creating an export profile, *or* if you are modifying a predefined import profile, and you want to use the new profile in the future, select **Yes**. The **Save Profile** dialog box then activates two options:

**Profile Name** Type a descriptive name for the new export profile.

**Save the export filename with this profile** Keeps the profile name and export file name together, so that when using this profile to export data in the future, the new export file will overwrite an old exported data file.

When done, select **Next>**. The **Ready To Export** display appears.

When ready to start exporting data, select **Finish**. To cancel the process at any time, select **Cancel**.

# *Setting up Security and Access Rights*

GoldMine employs a powerful security and access control system. This security system has been designed to allow everyone within the organization to use GoldMine, regardless of the access needs of the user. By using this security system, system administrators can permit a wide range of activities within GoldMine, without risking accidental or intentional contamination of data.

GoldMine uses a multi-level security system. Access can be controlled at the user account level, the database level, the record level, and the command or function level.

## ***Setting up Access Rights***

GoldMine's security system consists of a number of levels that work together to allow or inhibit access to data.

### ***Users and User Groups***

The username and password is the first level of security. Each GoldMine user should have a unique username. When every GoldMine user has a unique username, the system administrator can assign each user the minimum amount of access necessary without restricting the functionality of the tasks being performed in GoldMine. This ensures that users cannot access any GoldMine functionality unnecessary to their job performance.

GoldMine users can be logically grouped according to the functions that they perform. GoldMine allows the system administrator to define user groups with any number of individual members. For example, all GoldMine users involved in selling can be assigned membership in a user group called SALES.

## **GoldMine Functions**

The system administrator can permit or deny a user access to a variety of specific GoldMine functions. For example, the system administrator can selectively permit or deny access to specific GoldMine functions such as creating a new contact record, deleting contact records, or accessing another user's calendar activities.

## **Menu Commands**

In addition to granting access to specific GoldMine functions, the system administrator can determine which menu items appear to a user. By default, GoldMine displays all menu commands available to a user. Access to some menu commands requires Master Rights, as described on page 43. Removing a menu command prevents GoldMine from displaying the command to the user.

## **Contact Databases**

The system administrator can assign access rights to individual contact databases, and/or the currently active GoldMine system. Each contact database can be assigned public access, meaning that all GoldMine users can access (open) that contact database, or access can be restricted to an individual GoldMine user, or to a particular user group. When access is restricted to a user group, GoldMine allows only the users that are members of the group to access the contact database. Each contact database can have different access restrictions.

## **Screen**

In addition to assigning access rights for a contact database, the system administrator can assign access rights to each user-defined screen that is attached to the contact database. Access to a particular screen can be public, meaning that all GoldMine users can display the screen, or access can be restricted to a particular user or user group. When access is restricted to a user group, GoldMine only allows the users that are members of the group to access the screen. Users who do not have access to a particular screen cannot see that screen listed on the Fields local menu.

## **Record Curtaining**

Each contact record in the contact database is assigned an *owner*. By default, contact records are *public*, meaning that they are "owned" by all GoldMine users that have access to the contact database. However, a record can be assigned to a specific GoldMine user or to a user group. When ownership is

assigned to a user group, GoldMine treats the contact record as if it were “owned” by all the users that are members of the group.

GoldMine “curtains,” or hides, data on contact records from users that are not owners of the record. With record curtaining, if a user tries to display a contact record that he or she does not own, the contact screen is partially or completely “curtained,” hiding the data from view.

### ***Assigning Master Rights***

GoldMine recognizes a special type of user account called a Master Rights account. Users with Master Rights are permitted to access all portions of the system, and bypass all security features, *except* access to the personal Rolodex or the PersonalBase of the InfoCenter. Master Rights users are the only users that are permitted to access the user files, and modify users’ access privileges. For this reason, few individuals within an organization should be granted Master Rights. Naturally, the system administrator needs Master Rights to assign access rights to other GoldMine users.

At least one Master Rights account must be established, or you cannot add users to the GoldMine system.

## ***Setting up GoldMine Users***

Setting up GoldMine security begins with creating an access account for each individual to be granted access rights to GoldMine. Each user must have a unique username and password to enter the system. This prevents unauthorized users from gaining any access to GoldMine’s data. In addition, access to GoldMine’s data and Main Menu commands can be customized to ensure that users can access only needed functions and information.

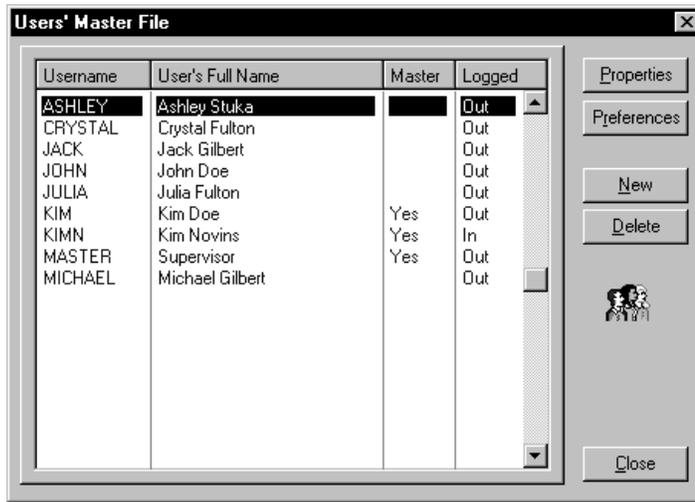
### ***Adding and Maintaining Users***

User configurations are stored in the **Users’ Master File**. Only a user with Master Rights can access the **Users’ Master File**. If a user does not have Master Rights, GoldMine does not display the menu options to access user configurations.

To add a GoldMine user:

From the Main Menu, select **File|Configure|Users’ Settings**.

**Users' Master  
File dialog box**



The **Users' Master File** dialog box contains the following information for each GoldMine user:

- Username** Displays the name of the GoldMine user. The entry can be the first name only, the last name only, or a combination of the first and last names. The username can only contain the letters A– Z and the numbers 0–9, and cannot contain spaces but can contain an underscore \_ or parentheses ( ). The username must begin with a letter. Also, because GoldMine creates some temporary files with the user's name, the following usernames cannot be used: AUX, COM1, COM2, COM3, COM4, CON, GM, GOLDSYNC, ISEARCH, LOOKUP, LPT1, LPT2, LPT3, NUL, PRN.
- User's Full Name** Displays the full name of the user.
- Master** Indicates whether or not the user has Master Rights.
- Logged** Indicates whether the user is currently logged into GoldMine. If this field indicates that a user is logged in, when in fact the user is not logged into GoldMine, the user has terminated GoldMine without exiting (such as by rebooting). *Exiting GoldMine (or Windows in general) in this manner can cause file corruption or data loss.*

The **Users' Master File** dialog box contains the following buttons:

- Properties** Displays the **[username] Properties** window for the highlighted user record – see “Changing a User’s Security Profile” on the following page.
- Preferences** Displays the **Personal** tab of the **Edit|Preferences** window for the selected user record, from which you can make changes to user information or displays.



For details on entering information in the **Personal** tab of the **Edit|Preferences** window, see “Entering Personal and Password Information” in the online Help.

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- New** Displays a new **[username] Properties** window, allowing you to add a new user record to the **Users' Master File** – see “Changing a User’s Security Profile” below.
- Delete** Deletes the highlighted user record from the browse window, and disables the user’s access to GoldMine. When you delete a user from the **Users' Master File**, GoldMine deletes the corresponding *username.INI* file.

## Changing a User's Security Profile

When either **New** or **Properties** is selected from the **Users' Master File**, the **[username] Properties** window appears. You can select settings in the **Properties** window to modify the user's security file information.

**[Username]  
Properties  
dialog box**

The screenshot shows the 'KIM Properties' dialog box with the 'Profile' tab selected. The 'Username' field contains 'KIM' and the 'Full Name' field contains 'Kim'. The 'Security' section has 'Master Rights' checked, a password field, 'Valid for days' set to 0, and 'Next change' set to 9/4/97. The 'Ownership' button is visible. The 'Forced log out' section has a bell icon, 'Forced log out time' set to 0, and 'When idle for' set to 0 minutes. 'OK' and 'Cancel' buttons are at the bottom.

The **[username] Profile** tab contains the following options:

**Username** If you are adding a GoldMine user, type the name of the GoldMine user. If you are editing an existing GoldMine user, this field displays the username of the user and cannot be edited.

**Username** can be the first name only, the last name only, or a combination of the first and last names. The username can contain only the letters A-Z and the numbers 0-9, and cannot contain spaces, but can contain an underscore \_ or parentheses ( ); for example, you can create a username of JOHN\_DOE or J(DOE). The username must begin with a letter. Also, because GoldMine creates some temporary files with the user's name, the following usernames cannot be used: AUX, COM1, COM2, COM3, COM4, CON, GM, GOLDSYNC, ISEARCH, LOOKUP, LPT1, LPT2, LPT3, NUL, PRN.

**Full Name** Enter or edit the user's full name. GoldMine can add the user's full name to the closing of a merged letter, so make sure that spelling and capitalization are correct.

- Password** Enter or change the user's password. If an entry is made in this field, GoldMine requires the user to enter his or her password on the GoldMine login screen before being given access to GoldMine. When this field is left blank, GoldMine does not require a password from the user.
- Each user can change an assigned password by selecting **Edit|Preferences**, then selecting **C**hange Password in the **P**ersonal tab.
- Master Rights** Determines whether or not the user has unrestricted access to all parts of GoldMine. A user with Master Rights has access to all aspects of the system, including all the options in the **U**ser Master File. Users with Master Rights are the only users who can perform user- and access- control maintenance, and access all of the **C**onfigure GoldMine submenus. Typically, only the system administrator has Master Rights.
- Valid for days** Specifies the number of days a user's password is valid. After the specified time has elapsed, GoldMine will require the user to change the old password before granting access to GoldMine. To disable this feature, enter 0.
- Next change** Specifies the date that a user's password will expire. When the date arrives, GoldMine will require the user to change the old password before granting access to GoldMine.
- Ownership** Displays the **N**ew Record Ownership dialog box, from which you can specify the rights to display contact records – see "Controlling Access to Contact Records" on page 64.
- Forced logout time** Automatically logs a user out of GoldMine after a certain time and period of inactivity. To use this feature, enter values in the **F**orced logout time and **W**hen idle for fields. GoldMine will automatically log the user out if the system time is later than the **F**orced logout time and the keyboard has been inactive for the specified idle minutes.

**When idle for** Automatically logs a user out of GoldMine after a certain time and period of inactivity. To use this feature, enter values in the **Forced logout time** and **When idle for** fields. GoldMine will automatically log the user out if the system time is later than the **Forced logout time** and the keyboard has been inactive for the specified idle minutes.

GoldMine does not start counting idle minutes until all batch operations have been completed. You can use this feature to start a long process, like indexing or transferring records, and GoldMine will wait until the process is complete before counting idle minutes. When the idle time has expired, GoldMine automatically logs the user out.

## **Working with User Groups**

Using GoldMine, you can create groups of users to simplify the selection of multiple users. This feature allows you to grant access to contact sets, and assign record ownership to multiple GoldMine users. In addition, GoldMine allows an activity, such as an appointment, to be scheduled for a group. You can define up to fifty groups of users.

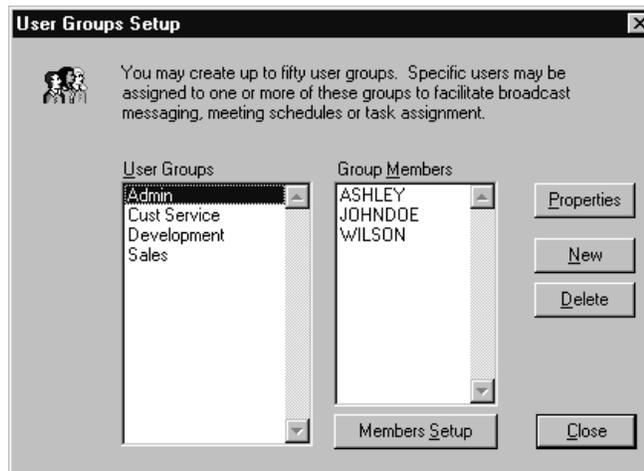
GoldMine allows you to use user groups in one of two ways. First, those GoldMine features that accept only one username, such as the **Allow access to** field for a contact set, also accept a group name entry. GoldMine includes all of the defined user groups in the user list for such fields. A user group appears in this type of listing in lower-case, surrounded by parentheses. For example, the group SALES appears in a user list as **(sales)**. When a group name is selected, GoldMine responds as if the field contains all of the members of the user group. Therefore, the user group can access the specified contact set.

In addition, functions that allow you to select multiple users, such as **Scheduling**, contain a **Select Users** button that displays a dialog box from which users and user groups can be selected. When a user group is selected from this list box, GoldMine propagates the **Selected Users** portion of the dialog box with all of the usernames that are members of the group. You can then remove users. To select or remove users from the appropriate list boxes, double-click on the names of the users or user groups.

## Maintaining User Groups

To display the **User Groups Setup** dialog box, select **File|Configure|User Groups**.

### **User Groups Setup** dialog box



The **User Groups Setup** dialog box contains the following options:

**User Groups** Contains one record for each user group defined in GoldMine. When a group is highlighted in this pane, a list of the group's members appears in the **Group Members** list box.

**Group Members** All of the members of the highlighted group appear in the **User Groups** list box. A group can contain any number of members.

**Members Setup** Displays the **Group Membership Setup** dialog box, from which you can add and delete members from the group. You can also add a member to a group from the **Membership** tab of the **[username] Properties** window – continue with “Assigning Group Membership to a User” on the facing page.

**New** Allows you to create a group to add to the **User Groups** list box. You must enter a name for the new group.

**Properties** Allows you to change the name of the highlighted group.

**Delete** Allows you to delete the highlighted group.

## Assigning Group Membership to a User

GoldMine allows you to maintain the list of groups for which a user is a member. To maintain the list of groups:

From the **File** menu, select **Configure GoldMine|Users File**. The **Users' Master File** dialog box appears, as shown in the figure on page 44. Highlight the user whom you want to assign to a group, then select **Properties**. Select the **Membership** tab.

### Membership tab



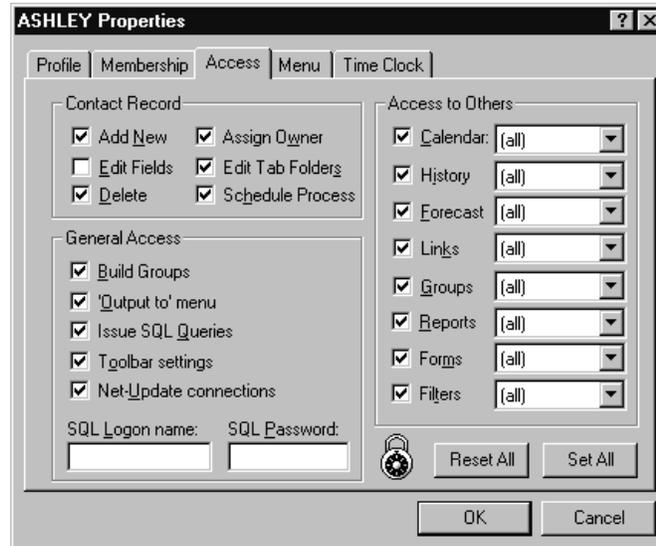
By selecting a group record from the **Excluded from** list box, you can include the selected user in that user group. As each group is selected, the user group's name record is moved from the **Excluded from** listing of the dialog box to the **Member of Groups** listing.

Likewise, to remove a user from a user group, double-click on the desired group in the **Member of Groups** listing. The group name returns to the **Excluded from** listing.

## Controlling User Access

You can control a selected user's access to various GoldMine features from the **Access** tab of the [username] **Properties** window. From the Main Menu, select **File|Configure GoldMine|Users File**. The **Users' Master File** dialog box appears, as shown in the figure on page 44. Highlight the user to whom you want to assign access rights, then select **Properties**. Select the **Access** tab.

Access tab



Options in the **Access** tab are grouped into four sections: **Contact Record**, **Access to Others**, **General Access**, and **SQL Server Logon**. Each of these sections is described in the following sections.

### Controlling Users' Rights to Contact Records

**Add New** Controls whether or not the user can add new contact records to the database. When this option is checked, the user can add new contact records by selecting **File|New Record**.

When this option is not checked, **File|New Record** is not available to the user.

**Edit Fields** Controls whether or not the user can edit existing contact records. When this option is checked, the user can edit contact records including the **Notes** by *either* selecting an individual field, *or* by selecting **Edit|Edit Contact**.

When this option is not checked, GoldMine does not allow the fields or **Notes** of the contact record to be edited by the user.

**Delete** Controls whether or not the user can delete contact records. When this option is checked, the user can delete contact records by selecting **Edit|Delete Record|Delete this contact record**, **Edit|Delete Record|Delete contact's scheduled activities**, or **Edit|Delete Record|Delete contact's history records**. GoldMine allows only Master Rights users to select the global deletion commands.

When this option is not checked, GoldMine does not allow the user to select these commands.

**Assign Owner** Controls whether or not the user can change the ownership of a contact record. When this option is checked, the user can change a contact record's owner by selecting **Edit|Record Ownership**, but only if the user is the owner of the contact record, or the record ownership is **(public)**. If the user is a member of the user group that owns the contact record, the user cannot change the owner. Only users with Master Rights access can change the ownership of all contact records.

When this option is not checked, **Edit|Record Ownership** is not available to the user.

**Edit Tab Folders** Controls a user's access to supplementary records in GoldMine's tab displays, such as the **Contacts**, **Profiles**, and **Referrals** displays. When this option is checked, the **New**, **Properties**, and **Delete** commands on various tab display local menus are available to the user, subject to the additional limitations described above.

When this option is not checked, these commands are not available to the user.

**Schedule Process** Controls whether or not the user can attach an Automated Process to a contact record. When this option is checked, the user can attach an Automated Process by selecting **Schedule|Automated Process**.

When this option is not checked, **Schedule|Automated Process** is not available to the user.

## **Controlling Access to Other Users' Records**

**Calendar** Controls whether or not the user can access the calendar activities of other GoldMine users. When this option is checked, the user can access the menu options and dialog box controls that select those activities that are displayed in GoldMine's activity list and calendar. In addition, the user can edit activities on the **Pending** display that are scheduled to other GoldMine users. When this option is not checked, these menu options and controls are not available to the user. In addition, the user will not have access to edit options for activities that are scheduled for other GoldMine users.

**History** Controls several features:

- Access to the history records of other GoldMine users. When this option is checked, the user can view another user's completed activities in the **Closed** tab of the activity list by selecting **U**ser from the activity list local menu.
- Whether or not the user can edit or delete history records belonging to another user in the activity list **Real Time** tab, or in the **History** tab of the contact record. When this option is checked, the user can select **P**roperties and **D**elete from the local menus.
- Whether or not the user can build groups based on another user's history. When this option is checked, the **U**ser field in the **Build Group Based on Completed Activities** dialog box can be used to select another user's history.
- Whether or not the user can select other users to be included in an analysis of completed activities. When this option is checked, the user can select other users for the analysis by selecting **S**elect **U**sers in the **Completed Activities Analysis** dialog box.

When this option is not checked, the above commands and menu options cannot be accessed by the user.

**Forecast** Controls whether or not the user can select other users to be included in a forecasted sales analysis. When this option is checked, the user can select other users for the analysis by selecting **S**elect **U**sers in the **Forecasted Sales Analysis** dialog box.

When this option is not checked, **S**elect **U**sers in the **Forecasted Sales Analysis** dialog box is not available to the user.

**Links** Controls whether or not the user can access other users' linked documents. When this option is checked, the user can launch another user's linked documents from the **Links** display.

When this option is not checked, linked documents that belong to another user can be viewed in the **Links** display, but GoldMine does not allow the user to launch the linked document, and the options on the Links local menu will not be available if the highlighted linked document belongs to another user.

**Groups** Controls whether or not the user can access other users' groups. When this option is checked, the user can select other groups by clicking **Select User** in the Groups local menu.

When this option is not checked, the user can select only the user's own groups, or public filters by clicking **Select User** in the Groups local menu.

**Reports** Controls whether or not the user can access other users' reports. When this option is checked, the user can select another user's reports by selecting from the **User** list on the **Reports Menu**.

When this option is not checked, the user can select only the user's own reports, or public reports via the **User** list in the **Reports Menu**.

**Forms** Controls whether or not the user can access other users' forms. When this option is checked, the user can select another user's forms by selecting from the **User** list in the **Merge Forms** dialog box.

When this option is not checked, the **User** list in the **Merge Forms** dialog box is not available to the user.

**Filters** Controls whether or not the user can access other users' filters. When this option is checked, the user can select another user's filters by selecting **User** in the **Filters** dialog box.

When this option is not checked, the user can select only the user's own filters, or public filters via the **User** list in the **Filters** dialog box.

## **Controlling General Access Rights**

- Build Groups** Controls whether or not the user can build groups. When this option is checked, the user can build groups by selecting **Add Members** from the Groups local menu.
- When this option is not checked, **Add Members** does not appear on the user's Groups local menu.
- 'Output to' menu** Controls whether or not the user can access the Output to command on any local menus. When this option is checked, the user can send data to one of the listed destinations, such as a connected printer or Excel.
- When this option is not checked, **Output to** does not appear on any of the user's local menus.
- Issue SQL Queries** Controls whether or not the user can send an SQL query to retrieve data for display.
- When this option is not checked, the **SQL Query** tab does not appear in the user's **Filters and Groups** window.
- Toolbar settings** Controls whether or not the user can change display and editing options for GoldMine toolbars, such as showing quick help boxes next to icons. When this option is checked, the user can access **Options** in the Toolbar local menu by right-clicking on the GoldMine toolbar.
- When this option is not checked, **Options** does not appear in the user's Toolbar local menu.
- Net-Update connections** Controls whether or not the user can update via the Internet to the most recent version of GoldMine.
- When this option is not checked, the **Net-Update** option does not appear in the user's **Help** menu.

## Controlling Users' Access to an SQL Server

**Logon Name** Specifies the login required to access an SQL database server. This entry can contain a maximum of 15 alphanumeric characters.

If this field contains an entry, the user does not have to enter the login to the SQL database server.

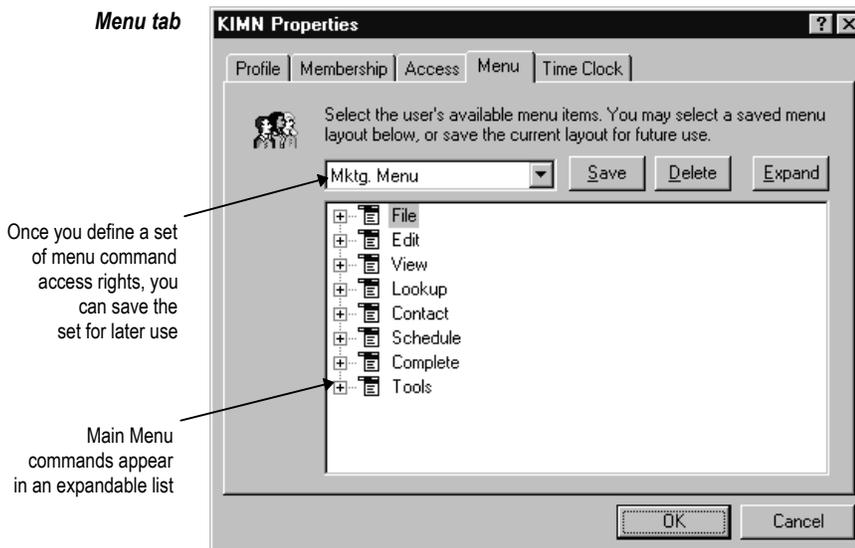
**Password** Specifies the password required to access an SQL database server. This entry can contain a maximum of 15 alphanumeric characters. Each character appears as an asterisk (\*).

If this field contains an entry, the user does not have to enter the password to the SQL database server.

## Granting Access to Menu Commands

You can control a user's access to various GoldMine menu commands. When you grant access to a menu command, the command appears on the user's display. However, if you do not grant access rights to a menu option, the option does not appear on the user's display.

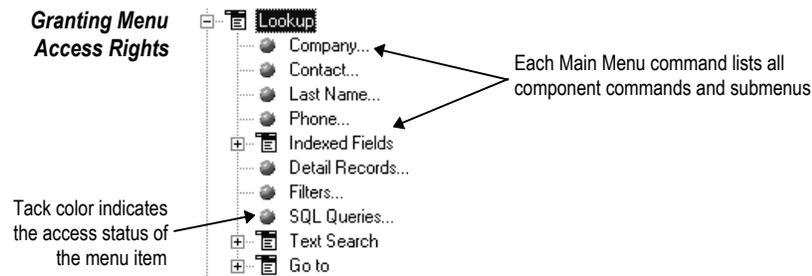
From the **File** menu, select **Configure|Users' Settings**. The **Users Master File** dialog box appears, as shown in the figure on page 44. Highlight the user for whom you want to set access rights to menu commands, then select **Properties**. Select the **Menu** tab.



The rights defined in the **Menu** tab add a layer of access control beyond the set of rights determined by granting Master Rights in the **Profile** tab. That is, you cannot grant rights to individual menu commands in the **Menu** tab that require Master Rights.

The **Menu** tab contains a list of all Main Menu commands except for the **Window** and **Help** menus. To display the operations available under a command, click on  next to the command. To open all menus, select **Expand**.

Once you open the menu, component menus and operations appears in the same order as they appear when you work with the menu in GoldMine. The following figure shows the list of operations that appears when you open the **Lookup** menu entry.



The **Menu** tab uses the following symbols and conventions:

- Colored tacks  indicate whether the user has access rights (green), or not (red).
- Commands followed by an ellipsis (...) indicate that GoldMine displays dialog boxes from which you can select settings before executing the command.
- Menu icons  indicate that you can expand the listed menu command to regulate access rights to component commands.

To remove a command from the selected user's GoldMine display, click . The tack changes from green to red. To reactivate a previously removed command, click .

To remove a submenu from the selected user's GoldMine display, disable each component command as described above. That is, to remove the **Synchronization** command from the **File** menu, you must disable the three component options: **S**ync with another GoldMine Site, **G**oldSync Synchronization Manager, and **T**ransfer between Contact Files.

### ***Saving a Custom Menu Template***

You can save your menu settings as a template that you can apply to other users. For example, you may want all of the users in the accounting department to have access rights to the same menu commands.

To save a set of menu settings, from the **Menu** tab, select **S**ave.

**Save Menu Template dialog box**



Type a descriptive title for the template in the field, then select **OK**. The template title appears in alphabetical order in the **Menu** tab drop-down list.

### ***Deleting a Custom Menu Template***

You can delete any previously saved menu template. You cannot delete menu items from the menu command listing.

To delete a selected menu template, from the **Menu** tab, select **D**efine. A prompt asks:

**Delete this template: [template name]?**

To delete the selected template, select **Y**es.

## Viewing the User Log

You can display a log that shows the activity in GoldMine by a selected user. From the Main Menu, select **File|Configure|Users' Settings**. The **Users Master File** dialog box appears, as shown in the figure on page 44. Highlight the user whose login activity you want to review, then select **Properties**. The **[Username] Properties** window appears. Select the **Time Clock** tab.

*Time Clock tab*

Date	Login	Logout	Logge	In	Keys	Clicks	CR()
Tue, Nov 2, 99	11:46am	10:13pm	10:26	2	68	335	ok
Wed, Nov 3, 99	2:01pm	10:48pm	8:47	1	172	279	ok
Fri, Nov 5, 99	1:36pm	10:20pm	8:44	1	25	54	ok
Sat, Nov 6, 99	2:19pm	10:22pm	8:03	1	92	142	ok
Sun, Nov 7, 99	1:35pm	10:07pm	6:36	4	91	142	ok
Mon, Nov 8, 99	11:28am	8:35pm	9:07	1	0	2	ok
Tue, Nov 9, 99	10:55am	11:16am	0:17	3	4	29	ok
Wed, Nov 10, 99	2:31pm	4:25pm	1:53	1	14	54	ok
Thu, Nov 11, 99	9:38am	5:54pm	8:06	3	4	38	ok
Sun, Nov 14, 99	1:31pm	10:04pm	7:31	2	153	318	ok
Thu, Nov 18, 99	9:46am		0:00	1	0	0	ok
Sun, Nov 21, 99	7:01pm	9:05pm	2:00	3	52	227	ok
Tue, Nov 23, 99	2:23pm		0:00	1	0	0	ok
Sun, Nov 28, 99	3:11pm	6:18pm	3:05	2	92	240	ok
Mon, Nov 29, 99	11:54am	7:36pm	7:19	2	21	53	ok
Tue, Nov 30, 99	10:20am	1:14pm	2:52	3	213	494	ok

The **Time Clock** tab contains the following information:

- Date** Date of the logged activity by the selected user.
- Login** Time that the user logged into GoldMine.
- Logout** Time that the user logged out of GoldMine.
- Logged** Total amount of time that the user was logged into GoldMine, including any time logged away.

If GoldMine is set to **Track each login** in the **Edit|Preferences|Global** tab, this column shows the logged-in time for one work session.

If GoldMine is set to **Track daily totals**, this column shows the cumulative login time for the entire date.



---

For details about these tracking settings, see “Configuring GoldMine” in the online Help.

---

**In** Total number of times that the users logged in to GoldMine.

If GoldMine is set to **Track daily totals** in the **Edit|Preferences|Global** tab, this column shows the number of times that the user logged into GoldMine each day, as shown in the figure on page 59.

If GoldMine is *not* set to **Track each login**, the value in this column is 1.

**Keys** Number of keystrokes pressed by the user while working in GoldMine.

**Clicks** Numbers of mouse clicks performed by the user while working in GoldMine.

**CRC** Indicates whether or not the data in the user log has been modified outside of GoldMine. This column displays `ok` for every log entry that is free of tampering, that is, external modification.

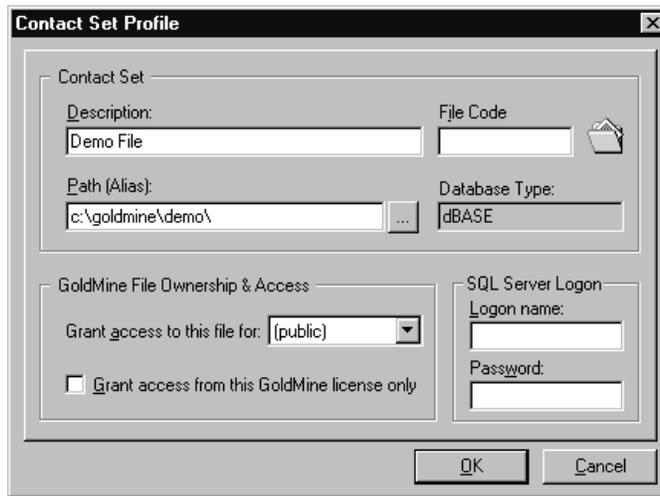
When done, select **OK** to close the **[Username] Properties** window.

## **Controlling Access to a Contact Database**

GoldMine allows you to control access to each contact database. Normally, each contact database is considered to be public, and available to all users. When desired, you can set access to a contact database so that only an individual user, or a user group, can access the database.

Access to each contact database is controlled by the **Access** field on the **Contact File Profile** dialog box. To display the **Contact File Profile** dialog box, select **File|Open Database**, highlight the desired contact set in the **Contact Set Databases** dialog box, then select **Properties**.

**Contact Set Profile dialog box**



The **Contact Set Profile** dialog box contains the following options:

**Description** Descriptive name for the contact set.

**File Code** Unique value given to each *database* that GoldMine uses to associate transfer data with the correct database(s). Using a file code allows remote synchronization of other databases, regardless of the name given locally to the database.

For example, an east coast branch office and a west coast branch office might have virtually the same contact set. Each branch office wants to synchronize data from their local contact set with the other office. The east coast office named the contact set *Industrial*, while the west coast office named the same contact set *Manufacturing*. If each office assigns the same **Contact set code** value to the local copy of the database, the offices can synchronize data.

**Path (Alias)** Location of the contact set.

**Database Type** Specifies the kind of contact set that you will open. GoldMine supports dBASE and MS SQL database formats.

- Grant access to this file for** Displays the owner of the contact set. Each contact database maintained with GoldMine has an owner, which can be an individual user, a user group, or **(public)**. Only the owner of the contact set, or a member of the group that owns the contact set, can open the contact set.
- By default, the owner of a contact set is **(public)**, which allows all GoldMine users to access the file. When the **Access** field is set to a user group name, GoldMine considers all members of the user group to be owners of the contact set.
- The access control is only available to users with Master Rights. Users with Master Rights can access all contact sets, regardless of their owner.
- Grant access from this GoldMine license only** Restricts contact set access to this specific licensed copy of GoldMine.
- Logon Name** Specifies the login required to access the SQL database server on which the contact set resides. This entry can contain a maximum of 15 alphanumeric characters.
- Password** Specifies the password required to access the SQL database server on which the contact set resides. This entry can contain a maximum of 15 alphanumeric characters. Each character appears as an asterisk (\*).

## ***Controlling Access to a Screen***

GoldMine allows you to control access to each user-defined screen. You can specify whether or not a particular screen is available in each contact database, and whether access to a screen is **(public)**, or restricted to an individual GoldMine user or user group. By default, a screen is accessible in all contact databases, and access to the screen is public.

Access to a screen is controlled by settings on the **View Profile** dialog box. To display a screen's **View Profile** dialog box, select the **File|Configure|Custom Screens**, highlight the desired screen in the **Custom Screens Setup** dialog box, then select **Properties**.

**Custom Screen  
Profile  
dialog box**

Custom Screen Profile dialog box

The **Custom Screen Profile** dialog box contains the following options:

**Screen** Name of the screen. This name appears in both the **Custom Screens Setup** dialog box and the **Fields** tab local menu to identify the screen.

**Tab Name** Optional label name for a tab. The label can be up to 20 characters, but only seven or eight characters actually appear on the tab.

Designating a tab name creates a custom tab for the screen. GoldMine reserves the third and fourth bank of tabs on the contact record tab bar for user-defined tabs.

**User Access** To restrict access to the selected screen, select a user or user group who can access to the screen. To allow all GoldMine users to access the screen, leave the **User Access** field set to **(public)**. If a user does not have access to a screen, that screen name does not appear on the **Fields** tab's local menu. Master Rights users have access to all screens.

**This Screen is available in the current contact file** When each screen is created, access to the screen is enabled for all contact databases. However, by selectively disabling this check box in specific contact databases, you can prevent the screen from being accessed within those databases. To disable access within a contact database, you must open that contact database and then select **Properties** in the **Custom Screen Profile** dialog box for the screen you wish to restrict.

## Controlling Access to Contact Records

*Record curtaining* allows the system administrator to hide information on a contact record from those individuals who do not own the record. With record curtaining active, if a user tries to display a contact record that he does not own, either the lower portion or all of the contact record is “curtained,” hiding the data from view.

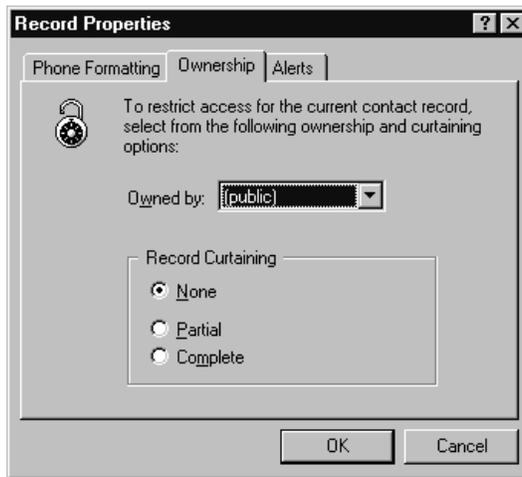
Record curtaining is controlled by the record owner. Each contact record can be either “public” or “private.” When a new record is added to the database, ownership defaults to **(public)**. Public records can be viewed by all GoldMine users.

Private records are records that have been assigned an owner, either an individual GoldMine user, or a user group. If you select complete record curtaining, private records can be viewed only by their owners, or by members of the owner user group. If you select partial curtaining, other users can see only the company, contact, and phone number for the private records.

To assign record ownership:

From the Main Menu, select **Edit|Record Properties**. The **Record Properties** window appears. Select the **Ownership** tab.

### Ownership tab



The **Ownership** tab contains the following options:

- Owned by** Sets the owner of the contact record. This field can be set to an individual GoldMine user, a user group, or **(public)**.
- Record Curtaining** Controls the displays and operations available when a user other than the owner accesses the record. Select one of the following options:
- **None:** user can view the entire record.
  - **Partial:** the portion of the contact record below the address and key fields is not visible.
  - **Complete:** the entire record is curtailed when a user other than the owner accesses the record. When an unauthorized user performs global operations, such as mass deletions or field updates, GoldMine ignores completely curtailed records. In addition, scheduled activities linked to a curtailed record appear as unlinked to unauthorized users.

When done, select **OK** to assign access and ownership rights to the contact record.



## Creating Custom Screens and Fields

GoldMine's contact record is designed to be as flexible as possible to meet a wide range of business information needs. The first two banks of the tab bar contain thirteen special *tabs*, such as **Profiles**, **Notes**, **Referrals**, and (additional) **Contacts** — see “Adding Data in Tab Folders” in *GoldMine Sales and Marketing At-a-Glance*. Within these tabs, you can view and/or create records with user-defined values.

However, you may need to maintain either different or additional information than possible with these standard tabs. GoldMine includes features that allow you to modify the structure of the contact database to store whatever information you need. For example, you can change the label names of primary fields on the contact record. You can also define additional screens to include in the **Fields** tab. Further, you can define your own custom screen tabs or expanded detail record tabs to display and edit information in user-defined fields. Just like the standard tabs, such as **Fields** or **Details**, GoldMine displays the custom tabs in the lower half of the contact record.

By creating your own custom fields, views, and tabs, you have unlimited flexibility in using GoldMine for information management. The following two scenarios illustrate the advantages of setting up custom displays.

**Scenario One: Designing a Display for Telephone Support**

Software company DataCo uses GoldMine for sales and to provide technical support to customers. Using GoldMine, the contact database can be redesigned to include the following fields:

<b>Field Description</b> (onscreen field name)	<b>Data Type</b> (type of entry accepted in the field)	<b>Size</b> (field size in no. of characters)
Serial Number	Character	10
Version Number	Character	10
Number of Users	Numeric	4
DOS Version	Character	8
Network Type	Character	8
Service Contract Type	Character	20
Expiration Date	Date	
Special Circumstances	Character	50

DataCo can design a custom screen in GoldMine to hold this information, so that each support representative can display a special technical support screen. Whenever a customer calls for technical support, all the relevant details are onscreen, to better equip support representatives to help customers resolve their problems. The sales department or the accounting department can also have custom screens designed specifically to support their needs. By customizing GoldMine displays, DataCo has the advantage of using a common system to share information, but that still allows each department to address unique needs.

**Scenario Two: Designing a Display for Realtors**

Westside Realty uses GoldMine to track customers who buy and sell homes. Their database can be modified to include these fields:

<b>Field Description</b>	<b>Data Type</b>	<b>Size</b>
Listing Date	Date	8
Listing Price	Numeric	10
Take Price	Numeric	10
Highest Offer	Numeric	10
Square Footage	Numeric	5
Number of Rooms	Numeric	2
Pool	Character	20
Garage	Character	20
Extras	Character	50

With these database modifications, the realtors can easily search the database for the house type and size that meets the requirements of a prospective buyer. Realtors can also easily locate comparable properties in a seller's area for quick sell-price estimates.

## **Working with Custom User Fields**

You can use one of the following methods to add custom

To add fields and/or create screens, you can perform the following steps:

1. Back up copies of CONTACT2.DBF and CONTUDEF.DBF.
2. Add all the new user fields into GoldMine (**File|Configure GoldMine|Custom Fields**).
3. Rebuild the database to include the new fields (**File|Configure GoldMine|Custom Fields|Rebuild**).
4. Design your user screen to show and allow editing of new fields.
5. Add a new user screen that appears as a view on the bottom of the contact record window.
6. Edit the data in the new user fields.

Each step is discussed in this section and in "Designing User-Defined Screens" on page 75.



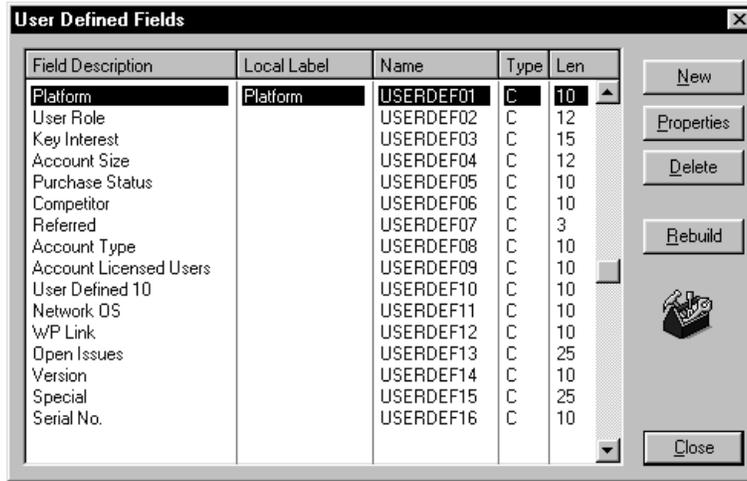
Before you begin, make a backup copy of the CONTACT2.DBF database. You can do this using either Windows Explorer or the DOS COPY command. To make the backup, copy the file to a different directory or disk. If you make a mistake or are otherwise unhappy with your changes, you can copy the backup CONTACT2.DBF into the contact database subdirectory. After copying the backup, rebuild the database as described in "Indexing and Rebuilding Files" on page 219 .

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## Adding a Field

To add fields to the currently open database, select **File|Configure|Custom Fields**.

**User Defined Fields dialog box**



The browse window in the **User Defined Fields** dialog box contains one record for each user-defined field in CONTACT2. **UserDef01** through **UserDef10** are considered predefined user fields, and will be listed even when no other user fields have been defined.

The **User Defined Fields** dialog box contains the following information for each record:

- Field Description** Description of the field that typically describes the contents or purpose of the field; for example, Account No.
- Local Label** Displays the local label as defined in the **Field Properties** dialog box – see “Defining Field Properties” on page 81.
- Name** Name that GoldMine uses to identify the field in the contact database.
- Type** Identification code for the data type of the field from one of the following values:
- C Character
  - N Numeric
  - D Date

**Len** Length of the field, in number of characters. The length of the field determines how much data the field can hold, or the total number of characters that can be stored.

The **User Defined Fields** dialog box contains the following buttons:

**New** Displays the **User Defined Field Profile** dialog box, in which you can define a new field – see “Defining a Field.”

**Properties** Displays the **User Defined Field Profile** dialog box in which you can edit a selected field – see “Defining a Field.”

**Delete** Removes the highlighted field from the **User Defined Fields** browse window.

**Rebuild** Initiates the rebuilding of the CONTACT2.DBF file after you have completed making changes to the User Defined Fields. See “Rebuilding the Database” on page 74.

**Close** Closes the **User Defined Fields** dialog box.

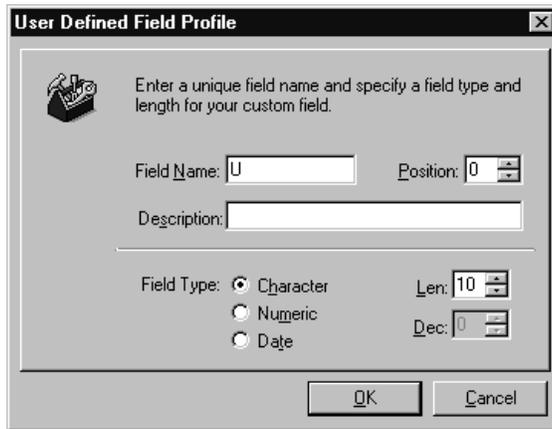
### ***Defining a Field***

You can define a new field or edit an existing field for the currently selected database.

To define a field:

From the **User Defined Fields** dialog box, select *either* **New**, or **Properties** – see “Adding Fields to a Contact Database” on page 70.

**User Defined  
Field Profile  
dialog box**



The **User Defined Field Profile** dialog box contains the following options:

**Field Name** Name of the field that will be listed in the contact database. The name must:

- Start with U
- Contain up to 10 alphanumeric characters
- Conflict with *no* other field in the database's custom fields list

GoldMine performs error-checking to ensure that you do not break any of these rules. The rebuild process identifies duplicate fields, and GoldMine selects the field with the lowest number in the sequence.



---

You can add telephone number fields to a contact record by creating user-defined fields that start with UPHONE.

---

**Position** Number for the field that determines the order by which tabbing advances through the user-defined screens in the **Fields** tab.

**Description** Description of the field that typically describes the contents or purpose of the field; for example, **Account No.** You can include spaces between characters in this value.

**Field Type** Identification code for the data type of the field from one of the following values:

- **Character**
- **Numeric**
- **Date**

For details about data types, see “Selecting Data Types” below.

**Len** Length of the field in characters. You can create a field of up to 250 characters.

The length of the field determines how much data the field can hold, or the total number of characters that can be stored.

**Dec** Number of decimal places within the field. GoldMine assigns one character place to the decimal point in determining field length. For example, to create a field that can accept hold values up to 9.99, you must assign a **Len** value of 4 and a **Dec** value of 2. This field applies only to numeric data types.

The **User Defined Fields** browse window does not display the **Dec** value.

When done, select **OK**. The new or modified field appears in the **User Defined Fields** browse window.

### **Selecting Data Types**

When defining a field, you can select one of the following data types:

**Character (C)** Character fields can contain any keyboard character, and are typically used to hold text. Character fields can be up to 250 characters in length, but the practical limit is 76 characters (the largest field that can be displayed on a user screen). Each character field can also have a unique lookup window attached to it.

**Numeric (N)** Numeric fields can contain positive or negative integers. A numeric entry can be up to fifteen characters (that is, hold a maximum value of +999,999,999,999,999 or -99,999,999,999,999). Numeric fields can contain from 0-9 decimal places.

**Date (D)** Date fields must contain a valid date and have a fixed length of eight characters. Dates are represented in a MM/DD/YY format. GoldMine checks the validity of date information when it is entered, and blanks out any invalid dates.

## **Rebuilding the Database**

*Important! Back up your data before attempting to rebuild!*

Before you can enter data into your new user-defined fields, you must rebuild the CONTACT2 database file. Rebuilding the database creates a new data file structure according to the field specifications that you entered in the **User Defined Fields** dialog box, and then copies all of the existing data from the old CONTACT2 file into the new file. This process requires exclusive use of the CONTACT2 file, so other network users must exit GoldMine or work on other contact databases during the rebuild process—for details on working with other databases, see “Opening a Contact Database” on page 208.

Since the rebuild process actually copies data from one file to another, you must ensure that adequate disk space exists before attempting to rebuild. In general, you will need at least as much disk space as the old CONTACT2 file occupied, plus additional space for the new fields. You can use the following formula to calculate the amount of disk space required to rebuild the database:

$$\text{SIZE OF OLD CONTACT2.DBF} + \\ \text{(SUM OF LENGTHS OF NEW FIELDS} * \\ \text{NUMBER OF RECORDS IN CONTACT FILE)}$$

You can see the size of the old CONTACT2.DBF file by using Windows Explorer, or the DOS DIR command in the subdirectory that contains the contact database to be rebuilt. The physical number of records in the active database is displayed in the lower right-hand corner of the contact record **Summary** display.

In addition, network users should have the appropriate Create, Read, Write, Rename and Delete rights to perform this type of operation on the network. For more information, consult your network administrator.



*If your hard drive does not have sufficient free disk space, or if you are unsure whether you have the necessary network rights, do not attempt to rebuild the database. Doing so may cause data loss.*

---

If you do have enough disk space, you can rebuild the database by selecting the Rebuild command from the **User Defined Fields** dialog box. After the rebuild is complete, you are ready to design screens that contain the new user fields.



---

Once the new fields have been added to the CONTACT2 database file, they can be referenced in expressions and filters like any other CONTACT2 field (such as **Comments** and **UserDef01–UserDef10**).

---

## ***Designing User-Defined Screens***

GoldMine provides two ways to display a screen:

- **Fields** tab
- User-defined field tab(s)

Any user with Master Rights can design a custom screen. Users granted access rights can display a custom screen either from the standard **Fields** tab, or as a custom tab that can be accessed by a tab like the **Fields** tab. GoldMine reserves the third and fourth banks of the contact record tab bar for up to 14 optional user-defined tabs. Any or all of these tabs can be assigned to hold custom screens.

Before you can enter data in the newly defined user fields, you must create a screen to hold the fields.

## ***Adding and Maintaining User-Defined Screens***

GoldMine provides two sample screens designed to meet typical contact management needs:

- **End User Screen:** contains ten predefined user fields
- **Tech Support Screen:** contains eight predefined user fields

Any user with Master Rights can create and maintain additional user-defined screens.

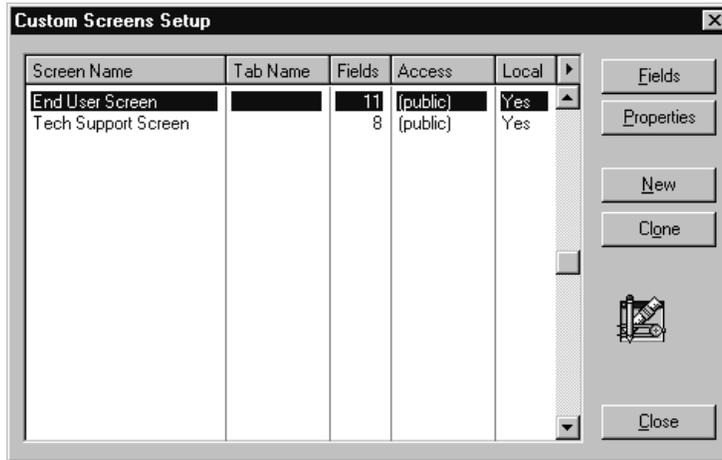
To add and maintain user-defined screens:

From the Main Menu, select **File|Configure|Custom Screens**.



A user with Master Rights can also access the **Custom Screens Setup** dialog box from the Fields local menu by selecting **Screens Setup**.

**Custom Screens Setup dialog box**



The **Custom Screens Setup** dialog box provides the following information for each listed user-defined screen record:

- Screen Name** Descriptive name for the screen. This name also appears in the Fields local menu to identify the screen.
- Tab Name** Optional label name for the user-selectable tab of up to 20 characters. Designating a tab name will create a custom tab for the screen. GoldMine reserves the third and fourth banks of tabs on the contact record tab bar for user-defined tabs.
- Fields** Number of display items on the screen. GoldMine maintains this field.

**Access** Specifies those users allowed access to the screen. By default, GoldMine assigns access to **(public)**, indicating that all GoldMine users have access to the screen. Access can be restricted to one user group (the group name appears in parentheses), or one user. In the latter cases, only the members of the group, or the specific user, can access the screen. A screen name appears *only* on the Field local menu of those users granted access to the screen. For details about granting access rights, see “Adding and Maintaining a Screen Profile” on page 79.

**Local** Indicates whether or not the currently open contact database displays the screen. The default value is **Yes**, but you can deny access to a selected screen for the currently open database.

The **Field Views** dialog box contains the following buttons:

**Fields** Displays the **Fields of Screen: [screen name]** dialog box for the selected screen. This dialog box allows you to edit existing fields, and delete fields from the screen – see “Working with Listed Fields” below.

**Properties** Displays the **Fields Screen Profile**, in which you can edit the **View Name**, **Tab Name**, and **User Access** to the selected fields view – see “Adding and Maintaining a Field Profile” on page 79.

**New** Displays the **Fields Screen Profile**, in which you can set up a new fields view – see “Adding and Maintaining a Field Profile” on page 79.

**Clone** Displays the **Fields Screen Profile**, in which you can copy the attributes of the selected screen into a new screen – see “Adding and Maintaining User-Defined Screens” on page 75.

**Close** Closes the **Custom Screens Setup** dialog box.

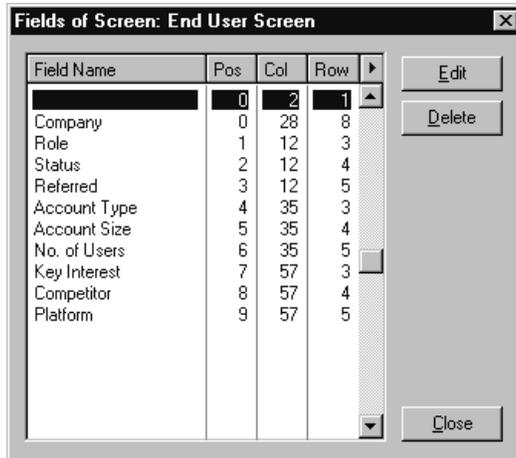
## Working with Listed Fields

You can modify a screen by editing or deleting fields.

To work with existing fields:

From the **Custom Screens Setup** dialog box, select **F**ields.

**Fields of Screen:**  
[field view name]  
dialog box



The **Fields of Screen: [screen name]** dialog box contains the following information:

**Field Name** Description of the field that typically describes the contents or purpose of the field; for example, Account No.

**Pos** Number for the field that determines the order by which:

-  advances through the user-defined fields in the **Fields** tab
- Fields appear in the **Fields of Screen** dialog box

**Col** Specifies the column in the screen assigned to the first character of the field.

**Row** Specifies the row number in the screen assigned to the field.

The **Fields of Screen: [screen name]** dialog box contains the following buttons:

**Properties** Displays the **Field Properties** dialog box in which you can edit a selected field – see “Defining Field Properties” on page 81. You can change values entered in the **Field Label** section, the **Position**, and the type of **Field Data**.

**Delete** Removes the highlighted field from the screen.

**Close** Closes the **Fields of Screen: [screen name]** dialog box.

### **Adding and Maintaining a Screen Profile**

You can add a screen, edit an existing screen, or copy an existing screen by defining values in the **Custom Screen Profile** dialog box. To work with a screen, select one of the following options from the **Custom Screens Setup** dialog box:

- **Properties:** modifies a screen
- **New:** adds a screen
- **Clone:** duplicates an existing screen

**Custom  
Screen Profile  
dialog box**

**Custom Screen Profile**

Enter the field screen's name, and an optional Tab name.  
If you enter a Tab Name, it will appear as a User Tab.

Screen: End User Screen

Tab Name:

You may limit access to this screen to selected users, and restrict this screen's availability to the current contact set.

User Access: (public)

This Screen is available in the current contact set

OK Cancel

The **Custom Screen Profile** contains the following options:

**Screen** Name for the screen. This name appears in both the **Custom Screens Setup** dialog box, and the Fields local menu.

**Tab Name** Optional label name for a tab of up to 20 characters that a user can define to create a special tab containing the screen. Although you can create a tab name of 20 characters, only seven or eight characters actually appear on the tab.

Designating a tab name will create a custom tab for the screen. GoldMine reserves the third and fourth bank of tabs on the contact record tab bar for user-defined tabs.



GoldMine orders the tabs alphabetically. If you want to order tabs differently, place a number at the beginning of the tab name. The number will not appear on the tab, but will determine the position of the title in the bank. For example, if you want the **Reseller View** tab to appear before the **Mgt View** tab, type 1Reseller in the **Tab Name** field.

---



To designate a hot key for the tab, type & before the letter of the tab name. For example, if you want to press **CTRL** - **G** to access the tab for **Mgt**, type M&gt in this field. The hot-key letter can appear anywhere in the tab name.



If you want to create a special tab, but do not want a name to appear on the tab, type two asterisks (\*\*) in this field. The tab will remain blank.

---

**User Access** Specifies user(s) granted access to the selected screen. To restrict access to this screen, select a user or user group who may access the screen. To allow all GoldMine users to access the screen, leave the **User Access** field set to **(public)**. If a user does not have access to a screen, that screen name does not appear in the Fields local menu when that user logs in to GoldMine.

**This Screen is available in the current contact set** By default, GoldMine grants access to a screen for all contact databases. To disable access to the screen in the *currently open* database, uncheck this option.

## Adding a Field to a Selected Screen

Once you set up a screen from the **Custom Screen Profile** dialog box, you can add fields to the screen.

To add fields to a screen:

From the **Fields** tab, right-click to display the Fields local menu. The Fields local menu lists each screen available in the currently open contact database.

Select the newly created screen. The new screen appears in the **Fields** tab. Since no fields have been defined for the screen, the screen appears blank.

The empty screen display area is where you place your own user-defined fields. Custom user fields are laid out in a “What-You-See-Is-What-You-Get” (WYSIWYG) format. You can place a field in any location within the screen display, and GoldMine displays the field in that location.

Each display field consists of two parts:

- **Field label:** appears on the left side of the display field, and contains the field label, and appears exactly as entered; that is, GoldMine accepts the entry as literal text.
- **Field value:** appears on the right side of the display field, and contains either a typed value from the contact database, or a dBASE expression. GoldMine allows you to edit the typed value, but you cannot edit a dBASE expression value.

### Placing a Field

You can add an existing or new field to the currently active screen.

In the **Fields** tab, right-click to display the local menu. Select **New Field**. The **Place Field** dialog box appears. In addition, a field designer toolbar appears – for icon descriptions, see “Field Designer Toolbar” on page 82.

*Place Field dialog box*



The **Place Field** dialog box contains the following options:

**Field** You can select an existing field, or a dBASE expression from the drop-down list.

If you select **dBASE expression**, GoldMine displays the **Field Properties** dialog box, and places the cursor in the **Expression** field so that you can enter an expression. The results of the dBASE expression will appear as the field's data.

**New Field** GoldMine displays the **User Defined Field Profile** dialog box, from which you can define the attributes for a new field. For details about the **User Defined Fields Profile** dialog box, see "Defining a Field" on page 71.

When done, select **OK**. GoldMine places the field label under the **Fields** tab, and starts the field designer mode, in which you can:

- Drag the field into position, then release the mouse button.
- Execute commands related to the field from the field designer toolbar—for details, see the following section.

### **Field Designer Toolbar**

The field designer toolbar appears after you place a field, and contains the following commands:

#### **Field Designer toolbar icons**



Displays the **Place Field** dialog box, from which you can select an existing field, dBASE expression, or create a field to place in the current screen.



Displays the **Field Properties** dialog box, from which you can define settings for the selected field.



Deletes the selected field.



Runs **GoldMine's Maintenance Wizard** to rebuild the database after to include new or changed fields.

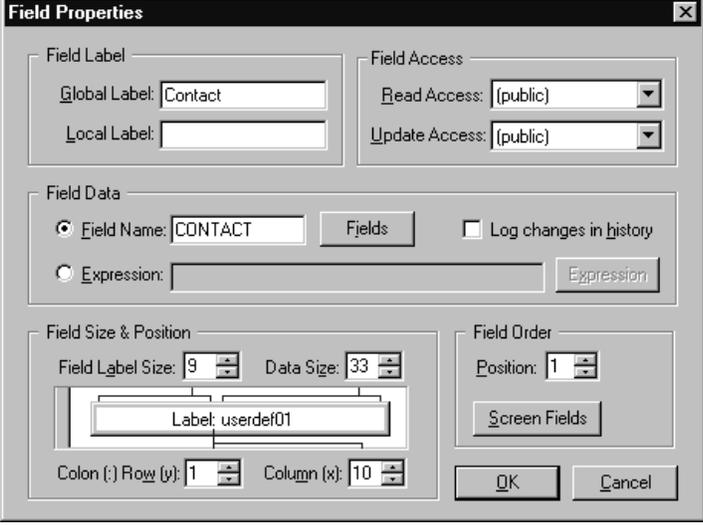


Quit the field designer

## Defining Field Properties

When you *either* select **Properties** from the Fields local menu, *or* click  from the screen designer toolbar, the **Field Properties** dialog box appears.

*Field Properties dialog box*



The **Field Properties** dialog box contains the following options:

**Global Label** Specifies label text that identifies the field data. GoldMine uses the text in the **Global Label** field, unless you have specified a value in the **Local Label** field. **Global Labels** appear consistently throughout all contact databases. If you would like to use a different label for this field in each contact database, use the **Local Label** field to store the label text.

**Local Label** Specifies the text of a field label for the current contact database only. By selecting this option, you can specify different label text for the primary field in different databases. This option is available only if you select **Field Name** – see below.

The following limitations apply when working with **Local Labels**:

- Local labels can be used *only* with fields, not expressions.
- Local labels can be used *only* with character fields.
- Length of the local label can be up to fifteen characters.

**Read Access** Specifies the single user or group given read-only access to the field. The default group is **(public)**, which grants read access to all GoldMine users.  
You can select a different user or user group from the **Read Access** drop-down list.

**Uppdate Access** Specifies the single user or group given update-only access to the topic. The default group is **(public)**, which grants update access to all GoldMine users. Make sure that the group granted update access is either the same as the user or group granted read access, or is a subset of the group granted read access.  
You can select a different user or user group from the **Uppdate Access** drop-down list.

**Field Name** Name of the field you want to display and edit. You can use any CONTACT2.DBF field within a screen. This option and **Expression** are mutually exclusive; that is, you can only select one of the two data display options for the field.

**Fields** Displays the **User Defined Fields** dialog box, from which you can select a user-defined field. For details about the **User Defined Fields** dialog box, see “Adding a Field” on page 70.  
This button is available only if your select **Field Name**.

**Expression** Specifies a dBASE expression that is evaluated to produce the result that appears in the field. The value resulting from the expression cannot be edited. If the expression cannot be evaluated, GoldMine displays Expression Error in the data portion of the display field.  
To add plain text to the screen, use this field to specify the display text in quotes, and set **Field Label Size** to 0. One use for a display field is for a “heading” in a view.

**Expression** Displays the **Edit dBASE Expression** dialog box, from which you can create or edit an expression or plain display text to appear in the **Expression** field – see above.

- Log changes in history** Places a log of additions of and changes to fields in the **History** tab of the contact record.
- Field Label Size** Specifies the length of the label that appears on the left side of the display field. This value is measured in characters. Increasing this value increases the label area of the display field. To create a display field without a label, set **Field Label Size** to 0. One use for a display field is for a “heading” in a view.
- Data Size** Specifies the length of the right (data) side of the display field. This value is specified in characters. Increasing this value increases the data area of the display field.
- Colon (:)** Specifies the row number in the screen where the field appears. Changing this value repositions the underlying display field. GoldMine moves the field to the specified row, so you can see where the field appears before committing to the values in the **Field Properties** dialog box.
- Row (y)**
- Column (x)** Specifies the column number in the screen where the field appears. Changing this value repositions the underlying display field. GoldMine moves the field to the specified column, so you can see where the field appears before committing to the values in the **Field Properties** dialog box.
- Position** Determines the order by which you can tab through the fields. This order may or may not correspond to the actual location of a field in the screen. By default, GoldMine moves through the edit fields in a column, then advances to the next column. This sequence allows a user to edit all the fields that start in the first column of the screen, then the second, etc. By assigning each field a **Position**, you can specify any order for tabbing through fields, regardless of the location of the fields in the screen. **Position** values do not need to be sequential or unique.
- Screen Fields** Displays the **Fields of Screen: [screen name]** dialog box, from which you can see the positions of fields in the current screen. For details about the **Fields of Screen: [screen name]** dialog box, see “Working with Listed Fields.”

When done defining these parameters, select **OK**. GoldMine saves the field definition, and immediately updates the screen display. To add another display field to the screen, select **New Field** from the Field local menu.

## ***Designing Expanded Detail Records***

GoldMine provides two display types for profiles:

- **Details** tab
- User-defined detail tab

Any user with Master Rights can design an expanded record that adds information to the standard detail record. For example, an office supply store might want additional information about the computers and peripherals used by a client. An expanded details record can provide up to eight additional fields in which the office supply sales representative can store quantitative information about computer hardware or other supply preferences, such as laser printer paper brand, diskette sizes and brand, etc.

Any user granted access rights can display an expanded detail record either from the standard **Details** tab, or from a user-defined detail record. GoldMine reserves the third and fourth banks of the contact record tab bar for up to 14 optional user-defined tabs. Any or all of these tabs can be assigned to hold expanded user-defined detail tabs.

A user-defined detail tab looks like any other tab in GoldMine because you can define:

- Tab with optional label and hot key
- Up to eight field labels per detail record
- Reference values for each field

## Selecting a Detail Record

You must select a standard detail record as the basis of an expanded detail record. You can set up an expanded detail tab from an existing record, or by creating a new detail record.



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To create an expanded detail record from a new detail record, you must first define the standard record – see “Adding a Detail Record.”

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To set up an expanded detail record from a standard detail record:

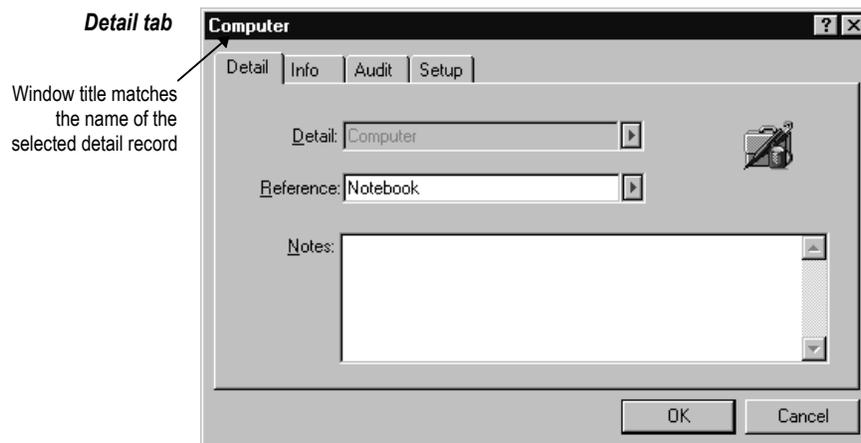
In the **Details** tab of the active contact record, select a listed detail record, then display the Detail local menu. Select **E**dit. The **Detail Properties** window appears. The actual title of the window shows the profile type you selected; for example, **Product Interests** or **Computer Type**. By default, GoldMine displays the **Detail** tab.



---

You can also access the **Detail Properties** window by double-clicking on a detail record listed in the **Details** tab of a contact record.

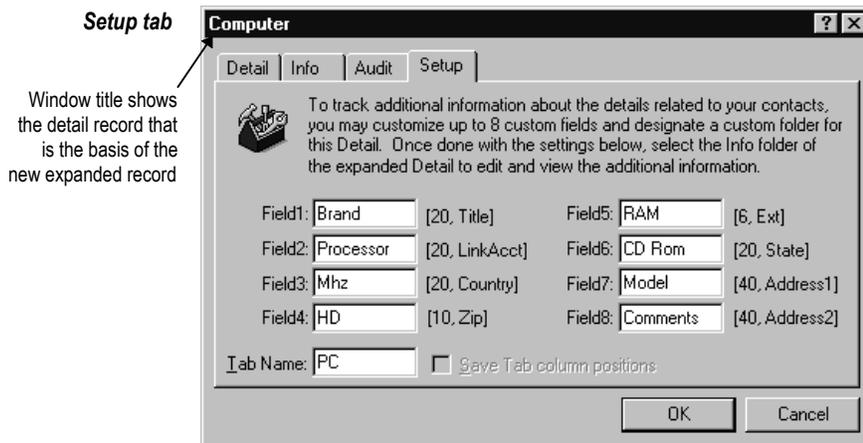
---



As shown in the figure above, the **D**etail and **R**eference entries from the selected detail record appear in the **Detail** tab. You cannot change the **D**etail value, which appears in a dimmed field. However, you can change the **R**eference entry – press **F2** to access a lookup window in which you can add, edit, or delete values.

## Setting up Tab and Field Labels

Once you have defined the **Detail**, select the **Setup** tab.



The **Setup** tab contains the following options:

**Field1–Field8** Defines up to eight field labels. To the right of each field label, bracketed information shows the length of the field, and the default purpose for the field. For example, **[2,State]** indicates that the field can contain a two-character entry and the intended purpose of the field is for a state entry, such as CA. While the field length may present limitations, you can use any field as best fits your needs.

The **Details** tab displays all eight fields. However, only the first three field labels appear as column headings in the expanded profile tab browse window. The first two columns always display:

- **Date** that the profile record was added to the contact record
- **Detail** name

**Tab Name** Title that appears on the tab. While the title can contain up to 15 characters, only a maximum of seven characters can be seen on the tab.



---

GoldMine orders the tabs alphabetically. If you want to order tabs differently, place a number at the beginning of the tab name. The number does not appear on the tab, but determines the position of the title in the bank. For example, if you want the **Hobbies** tab to appear before the **Automobile** tab, type 1Hobbies in the **Tab Name** field.

---



To designate a hot key for the tab, type & before the letter of the tab name. For example, if you want to press **CTRL - H** to access the tab for **Hobbies**, type &Hobbies in this field. The hot-key letter can appear anywhere in the tab name.



---

If you want the tab to be blank (no name), type two asterisks (\*\*) in this field.

---

**Save Tab  
column  
positions**

Allows you to change any modified column dimensions in either the standard **Details** tab or the expanded profile tab. For example, the entries in the **Reference** column of the **Details** browse window typically appear truncated or “cut off,” you can use your mouse to move the **Reference** column boundary to allow more room in that column. By selecting this option, the column remains at the new size until changed again.

When done, select the **Details** tab to create field values, or references, for the custom profile. A prompt asks:

**USER, would you like to save the new field labels?**

Select **Yes**.



---

For information about adding information to the expanded detail record, see “Adding Information to a Detail Record” in the online Help.

---



# 4

## Creating Custom Reports

Using GoldMine's powerful report engine, you can create custom reports based on the data in your contact databases. This report feature consists of two components:

- Report generator
- Form designer

You can use the report generator to sort data from your contact database and present the information in an easy-to-read format that can be printed or displayed onscreen.



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For details on using the report generator, see:

- "Run Reports" in *GoldMine Sales and Marketing At-a-Glance*.
  - *Creating and Modifying GoldMine 5.0 Reports*, which you can get from GoldMine's Web site at <http://www.goldmine.com>.
- 

GoldMine includes over eighty preconfigured report layouts to organize data for a variety of needs. However, if your company has special reporting needs, you can use GoldMine's form designer to create custom report templates. The extensive capabilities of the form designer are described in the following overview.

## Overview

GoldMine's *form designer* features comprehensive functionality that a developer can use to create customized reports and documents. Using GoldMine's form designer, you can create a custom report from a blank template or modify one of the standard GoldMine templates to create a custom template. GoldMine's graphical interface makes report design a straightforward, what-you-see-is-what-you-get (WSIWYG) process.

### **Form Designer Features**

The form designer's layout and data selection functionality allow you to perform the following:

- Organize report data in multiple sections
- Support a variety of field types and data sources
- Perform advanced formatting functions
- Create attractive layouts
- Save a blank template for future use, or archive a template with current data as a formatted report

### **Advanced Formatting Features**

The form designer supports a variety of formatting options for field objects, such as word-wrapping, selection of any installed font, justification, and color. GoldMine automatically wraps words at the end of a line to the beginning of the following line. You can select any of your installed fonts at available point sizes. Text can be center-, horizontal-, or vertical-justified. Foreground and background colors can also be assigned to the text.

The form designer also offers a number of advanced section and page formatting features. For example, you can use an expression field as a section break. You can specify page break criteria for every section. Blank spaces before and after a section can be suppressed. Specifying a section filter can conditionally suppress a report section. Multiple records can be printed across a page.

### ***Extensive Graphics Capabilities***

The form designer includes graphics functionality that can be used to enhance the appearance and usability of a report. You can create lines and borders around objects, insert bitmap graphics, and change the size and location of any item on the report.

You can create horizontal, vertical, or diagonal lines in a variety of colors, thicknesses, and styles. The line function can also be used to create section frames and field frames. You can also control the size and background color of the surrounding frame.

You can apply a border to outline an object on the report template, then apply colors to the line and fill of the border.

Bitmap graphics (.BMP) from any Windows application can be placed in a GoldMine report template by either copying a picture from the Windows clipboard or using the import function.

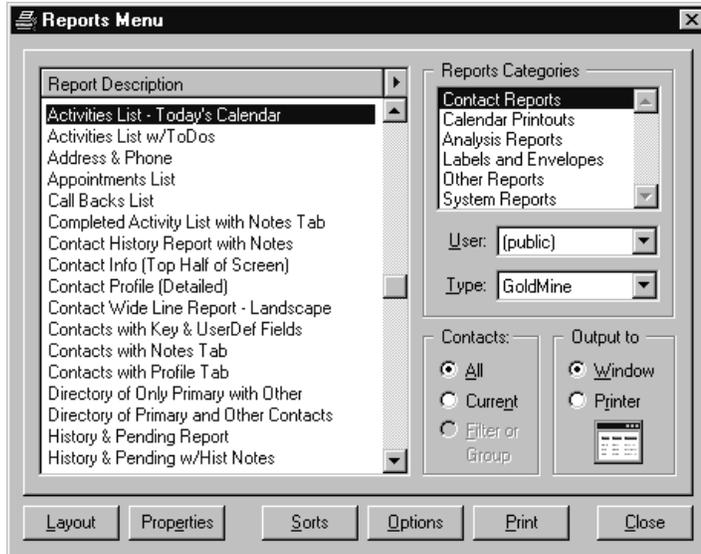
GoldMine supports a drag-and-drop method of placing all graphics items. Several arrangement tools are available to align items horizontally or vertically. Multiple items can be simultaneously selected and manipulated. Using the mouse to pull on sizing tabs found on the perimeter of graphics items enables proportional or nonproportional sizing.

## Accessing the Form Designer

To access the form designer:

From the Main Menu, *either* select **File|Print Reports**, or click  from the Getting Started or Basic toolbar.

**Reports Menu**



The **Reports Menu** contains the following options:

**Report Description** Displays report titles that correspond to the selected report category.

**Reports Categories** Displays available reports for the following categories:

- **Contact Reports**
- **Calendar Printout**
- **Analysis Reports**
- **Labels and Envelopes**
- **Other Reports**
- **System Reports\***

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\* GoldMine does not generate system reports from the **Reports Menu**, but from the **Output to|Printer** option available from the local menu of various windows throughout GoldMine.

- User** Selects the user whose reports are displayed. The default is **(public)**.
- Type** Displays available reports designed for either:
- **GoldMine**
  - **Crystal Reports**
- Contacts** Specifies the range of contacts to be included in the report from the following:
- **All**: includes all contact records in the currently open database in the report.
  - **Current**: includes only the active contact record in the report.
  - **Filter or Group**: includes only contact records in the report that are tagged, selected in the org tree, meet filter criteria, *or* are members of an activated group.
- Output to** Specifies where GoldMine sends the report:
- **Window**: lays out the report onscreen as the pages would be generated by the selected printer. Pages can be printed from a displayed report.
  - **Printer**: sends the report to the selected printer.
- Layout** Accesses the form designer – see “Designing Custom Reports” on page 96.
- Properties** Displays the **Report Profile** dialog box – see page 97.
- Sorts** Displays the **Report Sorting** dialog box – see “Sorting Report Data” in the online Help.
- Options** Displays the **Contact Report Options** dialog box that allows you to specify user, date range, data, and layout option for a report based on the selected report category – see “Selecting Data for a Report” in the online Help.

**Print** Sends the report to the device specified in **Output to**; that is, the report is *either* displayed onscreen, *or* printed as a hard copy.

**Close** Exits the **Reports Menu**, and returns to the GoldMine work area.

## Designing Custom Reports

A developer can use GoldMine's form designer to create customized reports and documents. GoldMine can create a custom report in one of two ways:

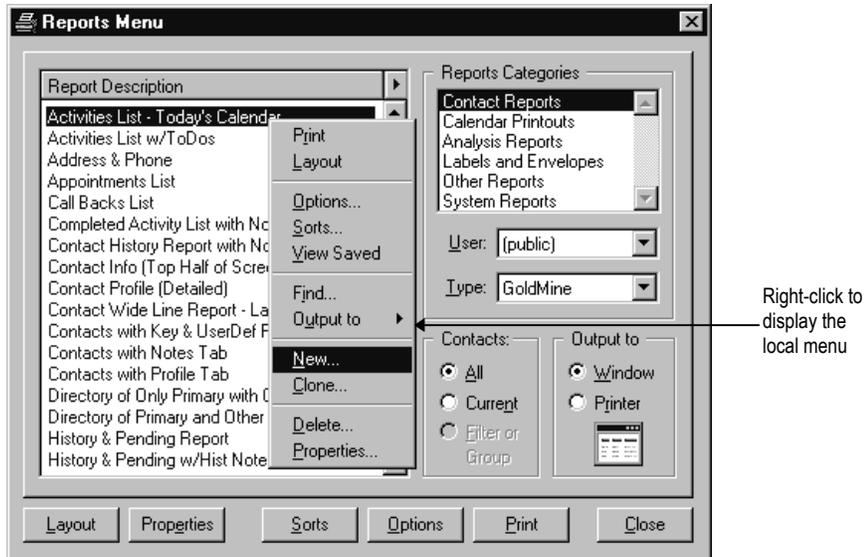
- Open a new template
- Use a previously created template as the basis for a new template

### Creating a New Report Template

To open a new report template from a blank template:

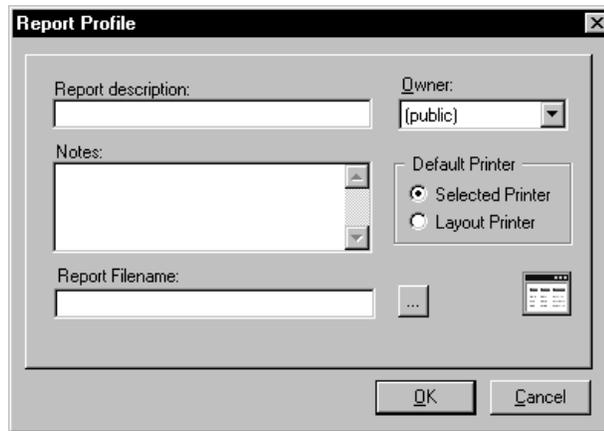
From the **Reports Menu**, right-click inside the **Report Description** column to display a local menu, as shown in the following figure.

**Opening a New Report Template**



Select **New**. The **Report Profile** dialog box appears.

**Report Profile**  
dialog box



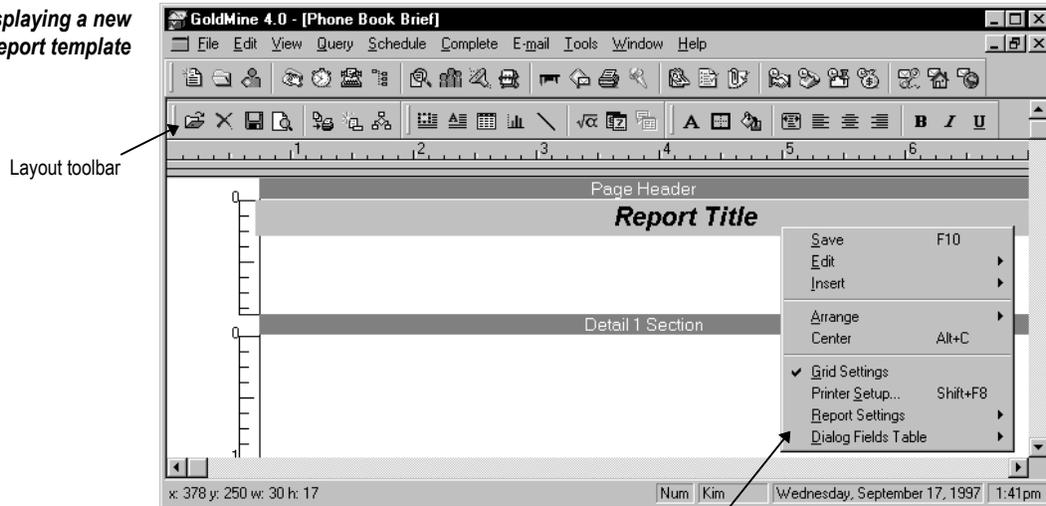
The **Report Profile** dialog box contains the following options:

- |                           |  |
|---------------------------|--|
| <b>Report description</b> | Title to be displayed in the <b>Report description</b> window of the <b>Reports Menu</b> .   |
| <b>Owner</b>              | Name of the GoldMine user associated with the report template.   |
| <b>Notes</b>              | Any information related to the report that provides details about printing the report.   |
| <b>Report Filename</b>    | Specifies the file associated with the report template. To change a report file name, type a designation of up to eight characters. GoldMine automatically adds an .FP extension. To locate a file, select <b>Browse</b> , which displays the <b>Select a File</b> dialog box.   |
| <b>Default Printer</b>    | Selects the printer to which GoldMine will send the report unless you specify another device: <ul style="list-style-type: none"><li>• <b>Selected Printer:</b> default device selected in the <b>Print Setup</b> dialog box.</li><li>• <b>Layout Printer:</b> special printer selected in GoldMine's layout mode—see "Select a Printer" on page 107.</li></ul> |

When done, select **OK** to save the settings. The **Reports Menu** appears. To work with the new template, *either* select **L**ayout, *or* display the local menu from the highlighted template description, then select **L**ayout.

The new report template appears.

Displaying a new report template



Layout toolbar

Layout local menu

To add and arrange items on the template, use the icons and/or local menu options. Layout icons are introduced in “Report Layout Toolbar” on page 102.

### Copying a Report Template

GoldMine can create a report template that is based on a previously created template. **C**lone copies an existing template and saves the template – with any subsequent changes – under a new file name.



To create a template based on any existing template, you must select **C**lone as described in this section. GoldMine uses the **C**lone feature *instead* of a “save as” function.

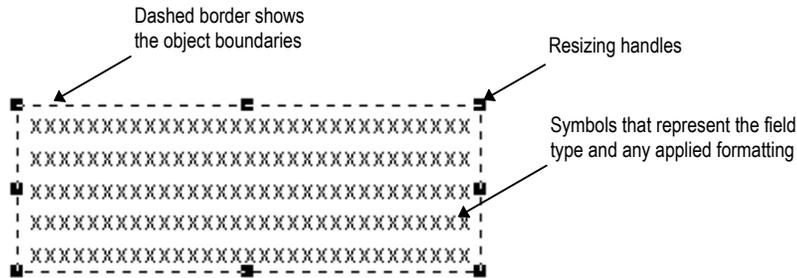
To clone a new report template from an existing template:

From the **Reports Menu**, move the highlight to the template listed in the **Report Description** column that you want to use, then right-click on the listed item to display a local menu.



## Selecting, Sizing, and Placing Objects

Each placed item, such as a data field or graphic, appears as an object in the report template. To determine the boundaries of a specific object, click on the text or symbols. A dashed border with handles appears at the perimeter of the object, as shown in the following example.



For any object in a report template, you can display location, size, and for data fields, name information. Click on the field object. The left side of the status bar displays the following information about the selected object:

- Location of the object on the vertical and horizontal axes
- Width and height of the object
- Field name information for the object

To size, move, or apply any formatting attribute to an object on a template, GoldMine must give input focus to the object; that is, you must select the object. The report designer allows you to easily select one or more objects. To select one object, click on the object with the left mouse button. A dashed outline surrounds a selected object.

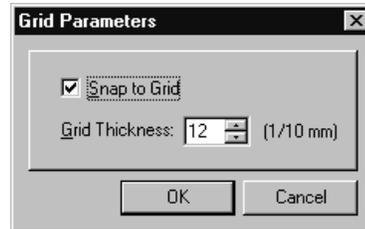
You can select several objects simultaneously. To select multiple objects, press and hold the left mouse button, then draw a rectangle around the objects. When you release the left mouse button, all objects that are completely or partially within the boundary of the rectangle will be selected. Dashed outlines surround all selected objects.

The surrounding rectangle can be decreased, or enlarged to include more objects. To change the size of the surrounding rectangle, select a sizing handle on the boundary, then hold the left mouse button and pull the boundary in the direction needed to enlarge or shrink the surrounding rectangle.

By default, *GoldMine* places – or *snaps* – each of these objects to an invisible grid on the layout. You can adjust the size of the grid, or turn off the snap feature.

To change or turn off the snap feature, right-click anywhere in the report template. The Layout local menu appears. Select **Grid Settings**.

*Grid Parameters dialog box*



Two options allow you to set the degree of placement flexibility that you need:

- **Snap to grid:** turns the snap feature on and off. By default, snap is active.
- **Grid Thickness:** adjusts the grid by increments of  $1/10^{\text{th}}$  millimeter. By default, the grid thickness is set to  $1\frac{1}{5}^{\text{th}}$  mm.

When done selecting grid settings, select **OK**.

### **Form Designer Toolbar**

When in *GoldMine*'s report layout mode, you can execute most form designer functions from *either* the Layout local menu, *or* by clicking on one of the icons on the toolbar that appears directly under the *GoldMine* toolbar. To display the local menu for the form designer, right-click anywhere inside the report template.

Four component toolbars provide a quick way to execute layout commands. Move the mouse pointer over one of the toolbar icons to display a yellow function title box next to the icon *and* a brief help message on the right side of the status bar.

### Layout Toolbar

The Layout toolbar contains commands to perform basic functions, such as opening and closing report templates. The Layout toolbar contains seven icons:

<b>Layout toolbar icons</b>		Return to <b>Reports Menu</b>		Quit the form designer
		Save a report template		Preview the template with data from the current contact database
		Select the printer (for hard copy output only)		Set up the report options
		Select a report filter to apply to data		

### Insert Toolbar

The Insert toolbar contains commands to insert items into the template, such as fields, labels, and graphics. The Insert toolbar contains eight icons:

<b>Insert toolbar icons</b>		Insert a field		Insert a text label
		Start a new section		Insert a .BMP graphic file
		Insert a line		Insert a formula
		Insert a system field		Insert a dialog field

### Style Toolbar

The Style toolbar contains commands to apply formatting to selected items, such as applying justification and color. The Style toolbar contains ten icons:

<b>Style toolbar icons</b>		Select a font		Place a border around an object
		Select a fill color for the background of the object		Set horizontal and vertical positioning for characters within an object
		Left-justify characters within an object		Center characters within an object
		Right-justify characters within an object		Make selected characters bold
		Italicize selected characters		Underline selected characters

### **Align Toolbar**

The Align toolbar contains commands to justify multiple selected items. To select the items that you want to align, hold down the left mouse button and drag the mouse over the items. A red-bordered object appears. Any item *touched* by the red border will be aligned as specified.

The Align toolbar contains ten icons:

<b>Align toolbar icons</b>		Align items to the left		Align items vertically along a center point
		Align items to the right		Align items to the top
		Align items horizontally along a center point		Align items along the bottom
		Make items the same width		Make items the same height
		Align items with even vertical spacing		Align items with even horizontal spacing

Icon commands are described over the next pages. Icons are grouped in sections by common functionality. For example, “Adding Graphics to a Report” presents information about the graphics-related icons.

### **Working with a Report Template**

Using layout toolbar icons, you can execute the following commands:

- Open a report template
- Preview a report template before printing or saving
- Select a printer other than the Windows’ default printer
- Save a report template that has been changed

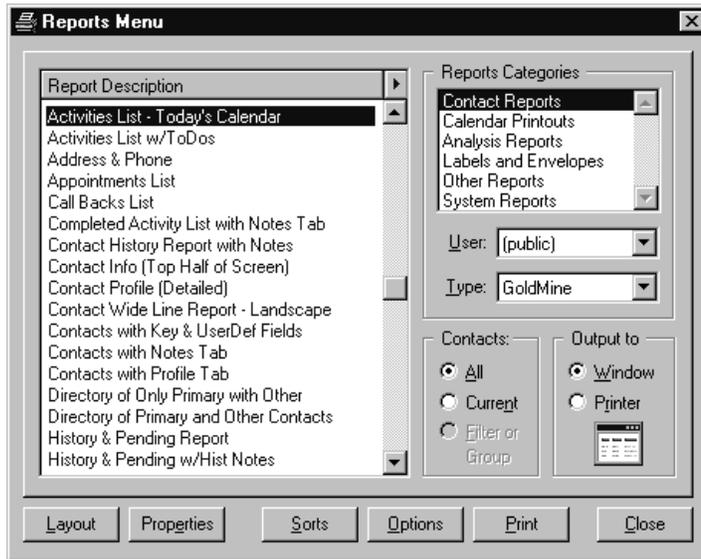
Each of these icon commands is described on the following pages. Other ways to execute a command, such as selecting a menu option, are also described.



## Open a Report Template

Click on this icon to display the **Reports Menu**.

### Reports Menu



To select a report type *other* than **Contact Reports**, click on the type of reports that you want from the **Reports Categories** list. To select a report template from the **Report Description** list, *either* press  to move to the report, *or* use the mouse to scroll to the report, then select **L**ayout.

The selected report template appears.

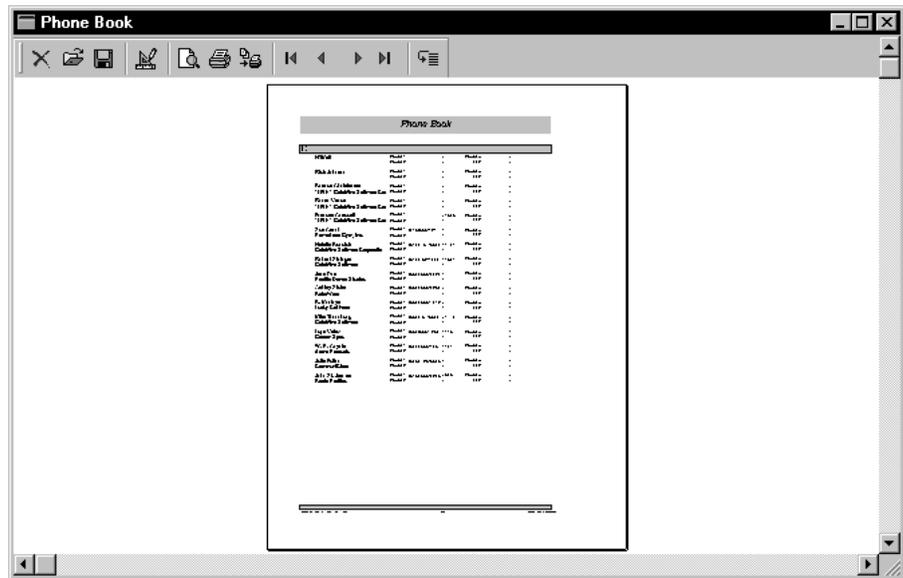


The preview screen presents a special toolbar that appears under the general GoldMine toolbar.

<b>Layout Preview Toolbar Icons</b>		Cancel the preview and return to the main contact screen		Display the <b>Reports Menu</b> from which a report can be selected
		Display the <b>Save the Report to a Disk File</b> dialog box, from which you can save the currently displayed report		Return to the layout mode
		Zoom in or out of full page view		Display the <b>Print Pages</b> dialog box, from which a page range can be specified
		Display the <b>Print Setup</b> dialog box, from which print and page setup options can be specified		Display the first page of the report
		Display the previous page of the report		Display the next page of the report
		Display the last page of the report		Display the <b>Page Jump</b> dialog box, from which a page number can be selected for onscreen display

By default, GoldMine displays a true-sized, or 100%, view. You can also display a full-page view of your report. To switch between a true-sized view, as shown above, and a full-page view, click  from the Preview toolbar. The full page view for the Address & Phone Report is shown in the following figure.

Previewing  
a full-page



### Select a Printer

The *default printer* is the currently selected printer in your Windows environment. The Printer Setup icon allows you to select a different printer and/or change setup parameters for the selected printer. Even if you plan to display the report onscreen, a printer must be selected to determine onscreen formatting, such as kerning, page breaks, etc.

To change the printer while working in the layout mode, click , press **SHIFT - F8**, or select **Printer Setup** from the Layout local menu.

The **Printer Setup** dialog box appears. To select a printer, click on the arrow next to the **Name** field to display a drop-down list of installed printers from which you can select a printer. The selected printer applies *only* to the GoldMine report being printed, and does *not* change the default printer selected in Windows' **Printers** tab.

To change settings for a selected printer, select **Properties**. The **Setup** dialog box appears, in which you can set additional setup parameters specific to the selected printer. For example, the **Properties** display for a PCL-type printer, such as a LaserJet, is different than the display for a PostScript-type printer, such as a LaserWriter.

When done selecting additional printer options, select **OK** to enter the parameters for the selected printer.



### Save a Report Template

To save the displayed report template with changes made during a work session, you can click on the Save icon, press **[SHIFT] - [F10]**, or select **Save** from the Layout local menu.

If you have made modifications to a report template, then try to preview, print, or exit the layout mode, a warning message asks:

#### Do You Wish to Save the Modifications?

To save and continue, select **Yes**. To abandon the modifications, select **No**. To abandon the preview and continue working on the report template, select **Cancel**.



Saving a report in the layout mode saves *only* a report template for future use. If you want to save a template with current records as a formatted report, select  to preview the template with data, then select . GoldMine displays the **Save the Report to a Disk File** dialog box, from which you can designate the file name and destination path for the report. For details about the Layout Preview toolbar icons, see page 102.

To open a report saved from the preview mode, from the **Reports Menu**, right-click within the **Report Description** panel to display the local menu. Select **View Saved**. The **Select Report File to View** dialog box appears. Saved report files have an .FRC extension. To open a report file, double-click on the report file name. The formatted report appears.

## Organizing Data in a Report

Using Layout toolbar icons, you can add fields to a report, create and apply filters to data, and divide the report into multiple sections. Each of these icon commands is described on the following pages. In addition, other ways available to execute the command, such as selecting a menu option, are described.

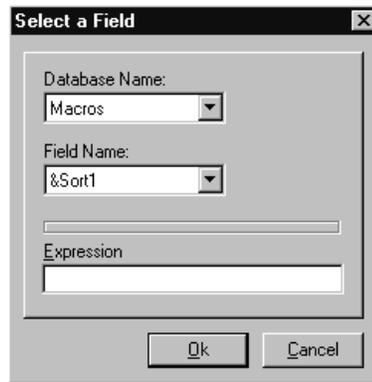


### Insert a Database Field

GoldMine can insert any field from a selected contact database into a template. By inserting the field, the entries in all records *or* those records that meet filter conditions appears in the generated report.

To insert a field from a database on the report form template, *either* click , press **[F2]**, *or* you can select **Insert|Data Field** from the Layout local menu.

Select a Field dialog box



The **Select a Field** dialog box contains the following parameters:

- Database Name** Displays the currently open contact database. To display a list of available databases, click on the arrow to the right of the field.
- Field Name** Displays the name of the selected field. To display a list of available fields, click on the arrow to the right of the field.
- Expression** dBASE expression that GoldMine will use as a basis for selection criteria.

When done, *either* select **Ok**, or press . An empty box appears on the form template. Drag the box to the position where you want the database field to appear, then release the mouse button. Click the mouse button to place the field in the report layout.



---

To add a duplicate of the new database field to your report, select **Insert|Duplicate Field** from the Layout local menu.

---

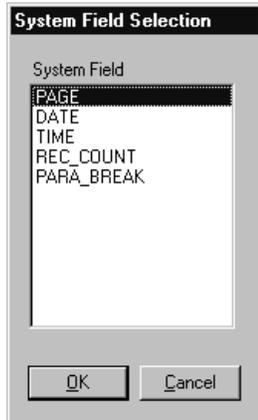


#### **Insert a System Field**

GoldMine automatically generates information that appears in system fields, such as calendar date, time, page number, record count, and paragraph break field. The calendar date and page number fields are typically printed on the page header or page footer. The paragraph break field can be used in a calculation expression to create multiple-line paragraph text (wrapped text).

To place a system field in the report form template, you can click , press **F4**, or select **Insert|System Field** from the Layout local menu. The **System Field Selection** dialog box appears.

**System Field Selection dialog box**



Select the system field that you want to place in the form template, then select **OK**. When you have moved the field into position and released the box, a value within the field indicates the type of data. For example, a date field might be indicated (depending on the selected date format) by MM/DD/YY.

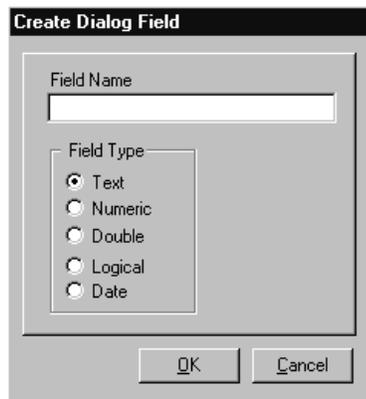


#### **Insert a Dialog Field**

Dialog fields prompt a user to enter data before generating the report. A report template can include one or more dialog fields. For example, you may create two dialog fields, `BEGIN_DATE` and `END_DATE` to prompt the user for the beginning and ending dates for the report. You can then print these two dates on the report header by inserting them in the proper place. A filter can also evaluate data from a dialog field.

You can only insert a dialog field if one or more dialog fields have been created. To create a dialog field, *either* press **CTRL - R**, *or* select **Dialog Fields Table|Create** from the Layout local menu.

**Create Dialog  
Field dialog box**



The **Create Dialog Field** dialog box contains the following options:

- Field Name** Assigns a name to the dialog field. Type a name of up to 30 characters to identify the dialog field.
  
- Field Type** Specifies the type of data that GoldMine will accept in the dialog field. For example, a **Text** dialog field accepts alphanumeric character entries. The **Double** field type accepts float values.

When done, select **OK**. GoldMine adds new dialog field to the **Select Dialog Field** dialog box list.

To place the newly created dialog field in the report template, click , press **F5**, you can select **Insert|Dialog Field** from the Layout local menu to access the **Select Dialog field** dialog box.

**Select Dialog  
Field dialog box**



Move the highlight to the field you want, then select **OK**. The **Select Dialog Field** dialog box disappears, and a blank box appears on the template. Drag the box to the position where you want the label to appear, then release the mouse button. Click the mouse button to place the field in the report layout. When the field is placed, the box disappears. A value within the field indicates the type of data placed. For example, a date field might be indicated (depending on the date format) by MM/DD/YY.



### Insert a Text Label

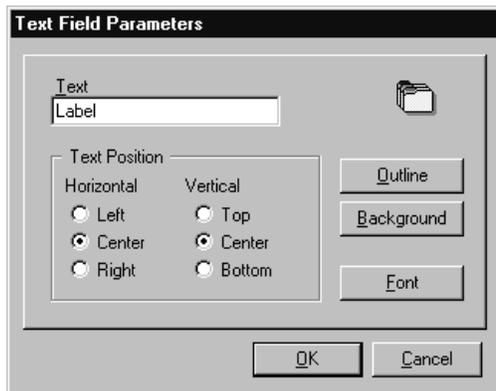
A text label is a field that serves as a title or caption for another field or graphic. A label contains text that is entered when the label is created; that is, the field doesn't use data from contact records. To change a text label, double-click on the field.

To insert a text label in the report template, you can click , press **F9**, or select **Insert|Label** from the Layout local menu to create a text label.

An empty box appears. Use the mouse to move the box to the position where you want the label to appear, then click on the left mouse button to leave the box in place.

When positioned, the text label displays the default text **label**. To change the default text, double-click inside the label. The **Text Field Parameters** dialog box appears.

**Text Field Parameters dialog box**



The **Text Field Parameters** dialog box contains the following options:

- Text** Designates an alphanumeric string for the label. Unless the object was resized manually, the size of the object does not automatically increase to accommodate the amount of text.

**Text Position** Specifies the horizontal and vertical position where you want the text placed within the text label object.

**Outline** Displays the **Line Properties** dialog box that contains options for attributes that can be applied to a border around the object.

On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Line Properties** dialog box, see page 149.

**Background** Displays the **Item Background** dialog box that contains options for color and texture that can be applied to the background of the object.

On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Item Background** dialog box, see page 147.

**Font** Displays the **Font** dialog box that contains options for selecting a typeface from the list of fonts installed on your system.

On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Font** dialog box, see “Select a Font” on page 143.

To apply the selected attributes to the form template, select **OK**.



#### **Insert Formula**

A formula field allows you to print a value derived from combining other fields, operators, and functions; that is, a value not directly available from any data field. A formula field is the same as an expression field. For example, profit can be calculated by multiplying the sales amount (data field) by the profit margin.

The formula field must have a unique name, and can define the following:

- Calculated fields
- Report selection criteria – calculation expression that must produce a TRUE or FALSE value
- Section selection criteria – calculation expression that must produce a TRUE or FALSE value

A formula field is specified using a *calculation expression*. A calculation expression consists of *operands* and *operators*. Operands are used to name criteria in a filter to sort the records. Operands can be fields, functions, result of an if/then/else statement or another subexpression.

### **Operators**

An operator specifies the function to be performed on data during a sort to determine if a record meets criteria required for selection from the database. Operators used in GoldMine reporting are described on the following pages.

**Logical OR** Returns a TRUE value if either the first operand or the second operand is TRUE. Otherwise, this operator returns a FALSE value. For example:

10=(20-2).OR.10=(20-10)-> TRUE

10=(20-2).OR.10=(20-8)-> FALSE

Operator Symbol	.OR.
First Operand Type	logical
Second Operand Type	logical
Result Type	logical
Precedence Rank	100

**Logical AND** The logical AND operator returns a TRUE value if both the first operand and the second operand are TRUE. Otherwise, this operator returns a FALSE value. For example:

10=(30-20).AND.10=(20-10)-> TRUE

10=(30-20).AND.10=(20-8)-> FALSE

Operator Symbol	.AND.
First Operand Type	logical
Second Operand Type	logical
Result Type	logical
Precedence Rank	200

**Equal** This operator returns a TRUE value if the first operand is equal to the second operand. Otherwise, this operator returns a FALSE value. For example:

10=(30-20) -> TRUE

10=(30-10) -> FALSE

Operator Symbol	=
First Operand Type	numeric, float, text, date, logical
Second Operand Type	same as first operand type
Result Type	logical
Precedence Rank	300

**Not Equal** Returns a TRUE value if the first operand is *not* equal to the second operand. Otherwise, this operator returns a FALSE value. For example:

10<>(30-20) -> FALSE

10<>(30-10) -> TRUE

Operator Symbol	<>
First Operand Type	numeric, float, text, date, logical
Second Operand Type	same as first operand type
Result Type	logical
Precedence Rank	300

**Greater than** Returns a TRUE value if the first operand is greater than the second operand. Otherwise, this operator returns a FALSE value. For example:

10>(30-22) -> TRUE

10>(30-10) -> FALSE

"ABC">"ACC" -> FALSE

Operator Symbol	>
First Operand Type	numeric, float, text, date, logical
Second Operand Type	same as first operand type
Result Type	logical
Precedence Rank	400

**Less than** This operator returns a TRUE value if the first operand is less than the second operand. Otherwise, this operator returns a FALSE value. For example:

10<(30-22) -> FALSE

10<(30-10) -> TRUE

"ABC"<"ACC" -> TRUE

Operator Symbol	<
First Operand Type	numeric, float, text, date, logical
Second Operand Type	same as first operand type
Result Type	logical
Precedence Rank	400

**Greater than or Equal to** Returns a TRUE value if the first operand is either greater than or equal to the second operand. Otherwise, this operator returns a FALSE value. For example:

10>=(30-22) -> TRUE

10>=(30-10) -> FALSE

"ABC">="AB" -> TRUE

Operator Symbol	>=
First Operand Type	numeric, float, text, date, logical
Second Operand Type	same as first operand type
Result Type	logical
Precedence Rank	400

**Less than or Equal to** Returns a TRUE value if the first operand is either smaller than or equal to the second operand. Otherwise, this operator returns a FALSE value. For example:

10<=(30-22)-> FALSE

10<=(30-10)-> TRUE

"ABC"<="ABCD" -> TRUE

Operator Symbol	<=
First Operand Type	numeric, float, text, date, logical
Second Operand Type	same as first operand type
Result Type	logical
Precedence Rank	400

**Part of** Returns a TRUE value if the first operand is contained within the second operand. Otherwise, this operator returns a FALSE value. For example:

"KEEP"\$"HOUSE KEEPER" ->TRUE

"KEEPING"\$"HOUSE KEEPER" ->FALSE.

Operator Symbol	\$
First Operand Type	text
Second Operand Type	text
Result Type	logical
Precedence Rank	500

**Addition** Adds the second operand to the first operand. If one of the operands is numeric and the other is float, the result will be a float-type value. If the operand type is text, the second string is appended to the first string. For example:

10 + 20-> 30

10 + 20.5-> 30.5

"Good " + "Day" -> "Good Day"

Operator Symbol	+
First Operand Type	numeric, float, text
Second Operand Type	same as first operand type
Result Type	same as first operand type
Precedence Rank	600

**Subtraction** Subtracts the second operand from the first operand. If one of the operands is numeric and the other float, the result will be a float-type value. If the operand type is text, the second string is appended to the first string. However, any spaces after the first string are truncated and transferred at the end of the output string. For example:

10 - 20 -> -10

10 - 20.5-> -10.5

"Good " - "Day" -> "GoodDay "

Operator Symbol	-
First Operand Type	numeric, float, text
Second Operand Type	same as first operand type
Result Type	same as first operand type
Precedence Rank	600

**Multiplication** Multiplies both operands. If one of the operands is numeric and the other float, the result will be a float type value. For example:

10 \* 20-> 200

10 \* 20.5-> 205.

Operator Symbol	*
First Operand Type	numeric, float
Second Operand Type	numeric, float
Result Type	numeric, float
Precedence Rank	700

**Division** Divides the first operand by the second operand. If one of the operand is numeric and the other float, the result will be a float type value. For example:

10 / 2-> 5

10 / 20-> 0

10 / 20.0-> .5

Operator Symbol	/
First Operand Type	numeric, float
Second Operand Type	numeric, float
Result Type	numeric, float
Precedence Rank	700

**NOT** Negates the logical value of the first operator. Being unary, this operator accepts only one operand. For example:

.NOT.(10=(20-10))-> FALSE

.NOT.(10=(20-8))-> TRUE

.NOT.("KEEP"\$"KEEPING")-> FALSE

Operator Symbol	.NOT.
First Operand Type	logical
Second Operand Type	N/A
Result Type	logical
Precedence Rank	800

**Total Of** Calculates the subtotal for the field indicated by the first operand. This unary operator accepts only one operand, which must be a field. This operator is allowed only in the calculation fields that are placed in a footer section. For example:

.TOTAL-OF.sales->amount

calculates the total sales amount for the footer section field.

Operator Symbol	.TOTAL-OF.
First Operand Type	numeric, float
Second Operand Type	N/A
Result Type	same as the first operand type
Precedence Rank	900

**AVERAGE OF** Calculates the average value for the field indicated by the first operand. This unary operator accepts only one operand, which must be a field. This operator is allowed only in the calculation fields that are placed in a footer section. For example:

`.AVE-OF.sales->amount`

calculates the average sales amount for the footer section field.

Operator Symbol	.AVE-OF.
First Operand Type	numeric, float
Second Operand Type	N/A
Result Type	same as the first operand type
Precedence Rank	900

**MAXIMUM OF** Provides the largest value of the field indicated by the first operand. This unary operator accepts only one operand, which must be a field. This operator is allowed only in the calculation fields that are placed in a footer section. For example:

`.MAX-OF.sales->amount`

returns the largest sales amount for the footer section field.

Operator Symbol	.MAX-OF.
First Operand Type	numeric, float
Second Operand Type	N/A
Result Type	same as the first operand type
Precedence Rank	900

**MINIMUM OF** Provides the smallest value of the field indicated by the first operand. This unary operator accepts only one operand, which must be a field. This operator is allowed only in the calculation fields that are placed in a footer section. For example:

`.MIN-OF.sales->amount`

returns the smallest sales amount for the footer section field.

Operator Symbol	.MIN-OF.
First Operand Type	numeric, float
Second Operand Type	N/A
Result Type	same as the first operand type
Precedence Rank	900

**COUNT OF** Provides the record count for a section. This unary operator accepts only one operand, which must be a field. This operator is allowed only in the calculation fields that are placed in a footer section. For example:

`COUNT-OF.sales->amount`

returns the number of records processed within the current section.

Operator Symbol	.COUNT-OF.
First Operand Type	numeric, float
Second Operand Type	N/A
Result Type	same as the first operand type
Precedence Rank	900

***Examples of Expressions***

`amount * qty`

calculates the product of the amount and qty fields.

`"abc" + "efg"`

adds the first value to the second value; that is, equals "abcefg."

`amount * (1 + profit_percentage)`

multiplies the value of the amount field by the result of another subexpression.

```
.if.state = "CA"
```

requires that the value CA exists in the state field for a record to be selected.

```
weekday("10/12/82")
```

returns the value of the 'weekday' function for 10/12/82.

```
profit_percentage*.TOTAL-OF.sales->amount
```

produces the profit percentage for all records within a section.



---

A calculation expression can evaluate an IF/THEN/ELSE condition as TRUE or FALSE. If TRUE, then the evaluated record meets the condition stated in the subexpression(s) following the THEN statement. If FALSE, then the evaluated record meets the condition stated in the subexpression(s) following the ELSE statement. For example:

```
.IF.sales->amount>100.THEN."GOOD SALE".ELSE."NOT SO GOOD SALE"
```

compares the sales amount and returns a text string. The resulting text string is equal to "GOOD SALE" when the sales->amount is greater than \$100. Otherwise, the text string is equal to "NOT SO GOOD SALE".

The subexpression(s) following the *then* and the *else* statements must return the same type result. For example:

```
.IF.customer->state="CA".THEN.(100).ELSE.(5.0)
```

is invalid because the *then* statement evaluates to a numeric (integer) value, but the *else* statement evaluates to a float value.

The statement could be corrected as *either*:

```
.IF.customer->state="CA".THEN.(100.0).ELSE.(5.0)
```

*or*

```
.IF.customer->state="CA".THEN.(100).ELSE.(5)
```

---

### **Operator Precedence**

In an expression with multiple operators, the execution priority of an operator is determined by its precedence. The operator with the highest precedence gets executed first. The precedence rank is indicated by a higher value number; for example, an operator with a precedence rank of 300 is executed before an operator with a precedence rank of 100.

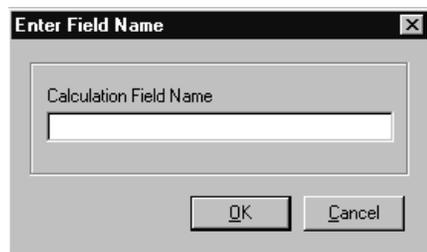
The lower precedence operators use the result of the higher precedence operators as operands. You can use parentheses to override the default precedence. For example,  $1 + 2 * 3 = 7$ . However,  $(1 + 2) * 3 = 9$ . When an expression consists of two operators of the same precedence level, the operator on the left is executed before the operator on the right.

### **Result of an Expression**

Processing a formula produces a specific type of value. For example,  $100 + 200 = 300$ , which is a numeric value. Also, "cat" <> "dog" results in a TRUE value that is a LOGICAL entity.

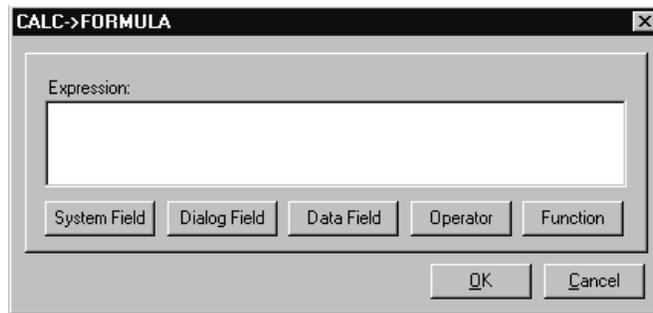
To place a calculation expression, or formula, in the report template, you can click , press **F3**, or select **Insert|Expression Field** from the Layout local menu to access the **Enter Field Name** dialog box.

**Enter Field  
Name prompt**

A screenshot of a dialog box titled "Enter Field Name". The dialog box has a title bar with a close button (X). Inside the dialog, there is a text input field with the label "Calculation Field Name" above it. Below the input field are two buttons: "OK" and "Cancel".

Type a name to be assigned to the formula, then select **OK**.

**Calculation  
expression  
dialog box**



You can type a calculation expression in the **Expression** field or build an expression using items provided by the five buttons. Each of these functions is the same as described for the **Record Selection Criteria** dialog box. For a complete description of each button function, refer to “Report Filter.”

When done with the expression, select **OK**. The field is represented by the symbol that corresponds to the output. For example, if the output will be an integer, the field is represented by 9,999,999.



#### **Apply a Report Filter**

GoldMine can apply a *filter* that has been created from fields that appear in any contact database(s). A filter is a sort condition used to select a subset of records from one or multiple databases.

The filter can specify criteria for data selection or section selection. Selection criteria is determined by conditions set up in a calculation expression. The calculation expression sets up a condition that must be resolved as TRUE or FALSE. A record – or section – will be selected for inclusion in the report if the expression conditions are true for the specified criteria. For example, the expression

```
contact1->State="CA"
```

will select only records that have a STATE field value of CA.

To apply a filter to data selected for the report, select the section in the report to which the filter will be applied, then double-click on the section header. You can also select **Edit|Filter** from the Layout local menu to access the **Record Selection Criteria** dialog box.

**Record Selection  
Criteria  
dialog box**



You can *either* type an expression in the **Expression** field, *or* build an expression using components provided by the five buttons.

**System Field** System fields provide information that GoldMine generates automatically, such as calendar date, time, page number, record count, and paragraph break field. The calendar date and page number fields are typically printed on the page header or page footer. The paragraph break field can be used in a calculation expression to create multiple-line paragraph text (word-wrapped text).

To select a system field for the **Report Selection Criteria** dialog box, select **System Field**. The **System Field Selection** dialog box appears – see page 109.

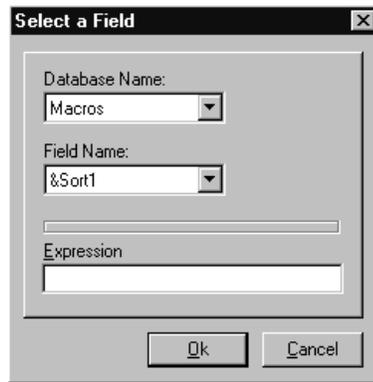
**Dialog Field** Field that prompts the user for data before report generation. Dialog fields can also be included in the form. For example, you may create two dialog fields, BEGIN\_DATE and END\_DATE to prompt the user for the beginning and ending dates for the report. You can then print these two dates on the report header by inserting them into the page header. Dialog fields can be evaluated as report selection criteria.

To select a dialog field for the **Report Selection Criteria** dialog box, select **Dialog Field**. The **Select a Dialog Field** dialog box appears – see page 111. Move the highlight to the field you want, then select **OK**. The selected field appears in the **Expression** field of the **Report Selection Criteria** dialog box.

**Data Field** Fields associated with a data record, including memo fields.

To select a data field for the **Report Selection Criteria** dialog box, select **Data Field**.

Select a Field dialog box



The **Select a Field** dialog box contains the following fields:

**Database Name** Name of the currently selected database. To display a list of available databases, click on the arrow to the right of the field.

**Field Name** Name of the currently selected field. To display a list of available fields, click on the arrow to the right of the field.

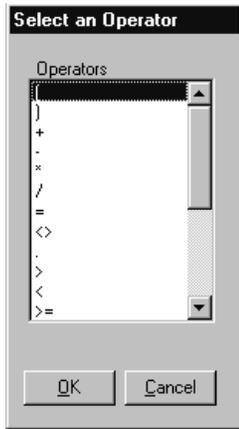
**Expression** Applies a filter expression to the report data.

When done, select **Ok**. The selected field appears in the **Expression** field of the **Report Selection Criteria** dialog box.

**Operator** Specifies the action to be performed on the values or fields specified in the calculation expression. For example, in `CAL ->DATE>06/01/96`, the operator `>` specifies that only records with dates after June 1, 1996, may be included in the report.

To select an operator for the **Report Selection Criteria** dialog box, select **Operator**.

Select an Operator dialog box



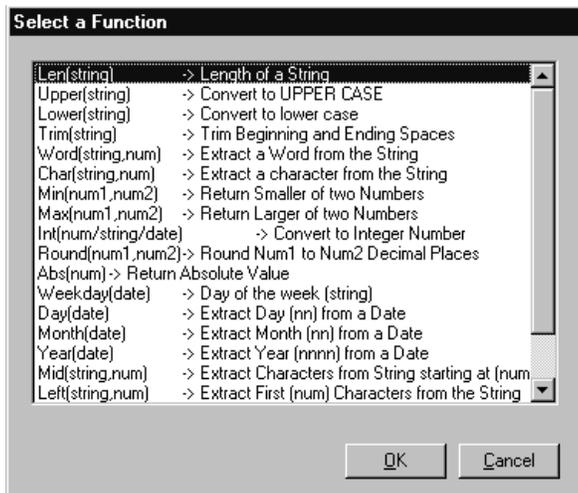
The **Select an Operator** dialog box contains 21 operators. For a description of operators, see “Operators” on page 114.

Move the highlight to the operator you want, then *either* select **OK**, or press **ENTER**. The selected operator appears in the **Expression** field of the **Report Selection Criteria** dialog box.

**Function** Accepts a predefined number of arguments and returns a value of a predefined type.

To select a function for the **Report Selection Criteria** dialog box, select **Function**.

Select a Function dialog box





**Trim Spaces** Returns a string by removing spaces from the beginning and ending of given string. For example:

TRIM(" ABCD ") -> "ABCD"

TRIM("Good Day ") -> "Good Day"

Function Name TRIM

First Argument Type text

Second Argument Type N/A

Result Type text

**Extract a Word** Extracts a word from the input string. The second argument specifies the word position to be extracted. Examples:

WORD("It is a Good Day",1) -> "It"

WORD("It is a Good Day",2) -> "is"

Function Name WORD

First Argument Type text

Second Argument Type numeric

Result Type text

**Extract a Character** Extracts a character from the specified string. The second argument specifies the position of the character to be extracted. For example:

CHAR("It is a Good Day",1) -> "I"

CHAR("It is a Good Day",2) -> "t"

Function Name CHAR

First Argument Type text

Second Argument Type numeric

Result Type text

**Convert to Text Type** Converts any other type argument to the text data using the default format specifications. For example:

TEXT("3/4/92")-> "3/4/92" (text)

TEXT(123)-> "123"

Function Name	TEXT
First Argument Type	numeric, float, date, logical
Second Argument Type	N/A
Result Type	text

**Smaller Number** Returns the smaller of the first and second arguments. If one of the arguments is numeric and the other argument is float, then the return type will be float. For example:

MIN(10,20)-> 10

MIN(10,20.0) -> 10.0

Function Name	MIN
First Argument Type	numeric, float
Second Argument Type	numeric, float
Result Type	numeric, float

**Larger Number** Returns the larger of the first and second arguments. If one of the arguments is numeric and the other argument is float, then the return type will be float. For example:

MAX(10,20)-> 20

MAX(10,20.0)-> 20.0

Function Name	MAX
First Argument Type	numeric, float
Second Argument Type	numeric, float
Result Type	numeric, float

**Integer** Converts any other type argument to a numeric type argument. For a float type of argument, this operation discards any decimal digits from the first argument. The date type argument is converted to a numeric value with the format YYYYMMDD. The logical-type argument is converted to either 1 or 0. For example:

```
INT(10.153)-> 10
INT("123")-> 123
INT("3/4/92")-> 19920304
INT(1<>2)-> 1
```

Function Name	INT
First Argument Type	text, float, date, logical
Second Argument Type	N/A
Result Type	numeric

**Round** Rounds the first argument to the number of decimal places specified by the second argument. For example:

```
ROUND(10.153,2)-> 10.15
ROUND(10.153,1)-> 10.2
```

Function Name	ROUND
First Argument Type	float
Second Argument Type	numeric
Result Type	float

**Absolute** Returns the absolute value of a specified argument. For example:

```
ABS(-10.153)-> 10.153
ABS(10.153)-> 10.153
ABS(-12)-> 12
```

Function Name	ABS
First Argument Type	numeric, float
Second Argument Type	N/A
Result Type	same as the argument

**Day of the Week** Returns the weekday for designated date. For example:

WEEKDAY("4/13/92") -> "Monday"  
WEEKDAY("4/14/92") -> "Tuesday"

Function Name	WEEKDAY
First Argument Type	date
Second Argument Type	N/A
Result Type	text

**Extract Day** Extracts the day (1-31) from the designated date. For example:

DAY("4/13/92") -> 13  
DAY("4/14/92") -> 14

Function Name	DAY
First Argument Type	date
Second Argument Type	N/A
Result Type	numeric

**Extract Month** Extracts the month (1-12) from the given date. For example:

MONTH("4/13/92") -> 4  
MONTH("5/14/92") -> 5

Function Name	MONTH
First Argument Type	date
Second Argument Type	N/A
Result Type	numeric

**Extract Year** Extracts the year from the specified date. The year appears in the four-digit format YYYY. For example:

YEAR("11/2/94")-> 1994

YEAR("2/21/95")-> 1995

Function Name	YEAR
First Argument Type	date
Second Argument Type	N/A
Result Type	numeric

**Extract Characters from Specified Position** Extracts characters from a string starting at a specified position. For example:

MID("GoldMine for Windows 95",10)-> for Windows 95

MID("Call 555-1234",6)-> 555-1234

Function Name	MID
First Argument Type	text
Second Argument Type	integer
Result Type	text



---

In any extract function, such as MID or LEFT, you can substitute an appropriate GoldMine field for a string value. For example, in a **Company** field with the entry GOLDMINE SOFTWARE CORP., the function MID(Contact1->Company,5) will return MINE SOFTWARE CORP.

---

**Extract first x Characters from a String** Extracts the specified number of characters from the beginning of a string. For example:

LEFT("GoldMine for Windows 95",10)-> GoldMine f

LEFT("Call 555-1234",6)-> Call 5

Function Name	LEFT
First Argument Type	text
Second Argument Type	integer
Result Type	text




---

Although GoldMine's form designer does not support the SUBSTR() function, you can obtain the same results by combining the MID function and the LEFT function as LEFT(MID(string,pos),len).

For example, SUBSTR("GOLDMINE SOFTWARE", 5, 2) will extract MI. The expression LEFT(MID("GOLDMINE", 5)2) will also extract MI.

---

**Extract last x characters from a String**

Extracts the specified number of characters from a string, starting from the rightmost character. For example:

RIGHT("GoldMine for Windows 95",10)-> Windows 95

RIGHT("Call 555-1234",6)-> 5-1234

Function Name	RIGHT
First Argument Type	text
Second Argument Type	integer
Result Type	text

**Convert a string to a decimal number**

Converts any other type argument to a floating point numeric. For example:

DOUBLE(1<>2)->1.00

DOUBLE("1.23")->1.23

Function Name	DOUBLE
First Argument Type	integer, date, text, logical
Second Argument Type	n/a
Result Type	float

Move the highlight to the function that you want to apply, then select **OK**.

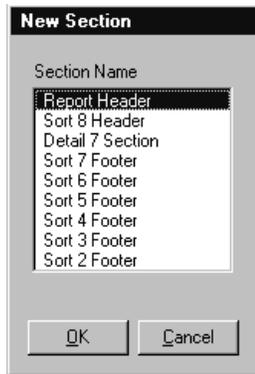


**Start a New Section**

Sections offer a useful way of organizing information. When you create a section, the form designer inserts the new section in the proper order within the form.

To insert a new section in the report form template, you can click , press **F6**, or select **Insert|Section** from the Layout local menu to access the **New Section** dialog box.

**New Section  
dialog box**



The **New Section** dialog box lists only those sections not already placed in the report form template. The list displays a sort header or detail section *only* if the higher level section is already selected. You must first select a sort header before you can select a corresponding sort footer, although a footer does not need to be specified for every section. For a description of section types, see “Organizing Data in a Report” on page 108.

Select the section type that you want to place in the form template, then select **OK**. GoldMine automatically places the section in the proper sequence.

**Working with Report Macros**

You can use macros in your report template to perform a variety of functions, or to retrieve information from GoldMine databases to generate specified data in the report. This section contains two lists of macros:

- **General macros:** can be used for all report categories – see page 136.
- **Calendar macros:** designed for use exclusively with calendar reports – see page 139.

To illustrate the use of macros in a report template, an example on page 141 provides a description of using the `&suppfile` macro to define break fields in your report.

### General Report Macros

You can use the following macros can in all report categories. For macros designed for use with calendar reports, see page 139.

<b>Macro</b>	<b>Displayed Field Data</b>	<b>Description</b>
&Address1&2	Address 1, Address2, and Address3	A line feed separates Address1, Address2, and Address3.
&CalActvName	Name of the scheduled activity printed based on the record type.	Example: if a record of rectype S is printed, the macro will return the value "sale."
&CityStateZip	City, State, and Zip	All values appear on the same line. City and state values are separated by a comma.
&Company&Address	Contact, Company, Address1, Address2, Address3, City, State, Zip, Country	A line feed separates all fields. City, State, and ZIP values are displayed on one line.
&Company, Contact	Company, Contact	Fields are separated by a semicolon.
&Contact, Company	Contact, Company	Fields are separated by a semicolon.
&FullAddress	Address1, Address2, Address3, City, State, Zip	A line feed separates address lines. City, State, and ZIP values are displayed on one line.
&FullName	Returns the full name of the currently logged user as found in the Users' file.	
&HistActvName	Name of the completed activity printed based on the record type.	Example: if a record of rectype S is printed, the macro will return the value "sale"
&Licensee	Name of the licensee	Generates data from the Licensed to field in the banner display.
&LocalLabel:	Returns the local label of the field specified after the colon	
&Name&Address	Contact, Title, Company, Address1, Address2, Address3, City, State, Zip, Country	All fields are separated by a line feed, except City, State, and ZIP values are displayed on one line.
&Phones	Phone1/Ext., Phone 2/ Ext., Phone3/Ext., fax/Ext.	Generates all phone numbers and the fax number, with extensions, if applicable.

<b>Macro</b>	<b>Displayed Field Data</b>	<b>Description</b>
&Sort1	Generates data from the field selected as the primary sort for the report.	&Sort1 can also be used to specify a break field within a sort header. For example, if the primary sort of a report is specified as contact1->company, and the value of &Sort1 is inserted for the break field in the sort header, the report will break on the same field.
&Sort2	Generates data from the field selected as the secondary sort for the report.	See &Sort1.
&Sort3	Generates data from the field selected as the tertiary sort for the report.	See &Sort1.
&SourceFile	Database file from which data is retrieved for the report	
&Suppfile="xxx"	Specifies break fields and filters within report sections. This macro identifies the database and record types (rectypes) with which you will work. The xxx must be at least two characters, but no more than three. The following values can be used to designate databases: <ul style="list-style-type: none"> <li>• ContSupp.DBF = cs</li> <li>• Calendar.DBF = ca</li> <li>• ContHist.DBF = ch</li> </ul> For the rectype values that can be used as the third character, see "Database Structures" in the online Help.	For an example, see "Example: Using Macros to Define Break Fields" on page 141.
&Title&Address	Contact, Title, Company, Address1, Address2, Address3, City, State, Zip	All fields are separated by a line feed, except City, State, and ZIP values are displayed on one line.

### Calendar Report Macros

You can use the following macros only in calendar reports. These macros return results based on the option settings and reportable data present in the database table.

<b>Macro</b>	<b>Returned Value</b>	<b>Description</b>
&CDow	Name of the day of the week.	Example: if a date falls on the first day of the week, &CDow will return Sunday since Sunday is treated as the first day of the week.
&CMonth	Name of the current month. Also returns all months included in a date range specified for the report in the <b>Calendar Report Options</b> dialog box.	<b>Example (single value):</b> June <b>Example (range):</b> If the date range is set as 01/01/99 to 06/30/99, &CMonth will return all months that fall within the date range; that is, January, February, March, April, May, and June.
&CMonthYear	Name of the current month plus the four-digit year. Also returns all months plus four-digit years included in a date range for the report in the <b>Calendar Report Options</b> dialog box.	<b>Example (single value):</b> June 1999. <b>Example (range):</b> If the date range is set as 11/01/98 to 03/30/99, &CMonth will return all months plus years that fall within the date range; that is, November 1998, December 1998, January 1999, February 1999, and March 1999.
&Day	Numeric value of the current date. Also returns all numeric values for all dates included in a date range for the report in the <b>Calendar Report Options</b> dialog box.	<b>Example (single value):</b> 12 for July 12, 1999. <b>Example (range):</b> If the date range is set as 07/15/99 to 07/19/99, &Day will return 15, 16, 17, 18, and 19.
&DayNo	Day number based on position in the calendar year.	<b>Example:</b> For January 2, 2000, &DayNo will return Day 2.
&Detail	Information specified in the <b>Calendar Report Options</b> dialog box.	

<b>Macro</b>	<b>Returned Value</b>	<b>Description</b>
&Dow	Numeric value for the day of the week. Also returns all numeric values for all dates included in a date range specified for the report in the <b>Calendar Report Options</b> dialog box.	Example: if a date falls on Wednesday, &Dow will return 4 since Wednesday is the fourth day of the week.
&FromDate	Entry in the from <b>Date</b> field of the <b>Calendar Report Options</b> dialog box.	
&Hour	Time in hourly increments from 7:00 a.m. to 7:00 p.m. The time appears in the 12-hour format.	
&LastMonth	Generates a graphical representation of the <i>prior month</i> based on the date of calendar records in the current report page.	<b>Example:</b> If the report displays entries for the month of January on page three, &LastMonth will return December, which is the month <i>prior</i> to displayed entries.
&Month	Numeric value corresponding to the current month. Also returns the value of the month for all dates within a specified date range in the <b>Calendar Report Options</b> dialog box.	<b>Example (single value):</b> January is represented as 1. July is represented as 7. <b>Example (range):</b> If a date range is set as 3/1/99 to 8/31/99, &Month will return 3, 4, 5, 6, 7, 8.
&NextMonth	Generates a graphical representation of the <i>following month</i> based on the date of calendar records in the current report page.	<b>Example:</b> If the report displays entries for the month of July on page three, &NextMonth will return August, which is the month following displayed entries.
&ThisMonth	Generates a graphical representation of the <i>current month</i> based on the date of calendar records in the current report page.	<b>Example:</b> If the report displays entries for the month of August on page three, &ThisMonth will return August, which is the same month as displayed entries.
&Time	Scheduled time for calendar records in the 12-hour format.	

<b>Macro</b>	<b>Returned Value</b>	<b>Description</b>
&WDay1	Numeric value corresponding to the Monday for the week in which the date falls.	<b>Example:</b> If the records fall in the week of January 26–February 3, 1997, the value returned by &Wday1 is 27, which corresponds to the date of the Monday (January 27, 1997).
&WDay3	Numeric value corresponding to the Wednesday for the week in which the date falls.	See &WDay1.
&WDay4	Numeric value corresponding to the Thursday for the week in which the date falls.	See &WDay1.
&WDay7	Numeric value corresponding to the Sunday for the week in which the date falls.	See &WDay1.
&WeekNo	Week number based on position in the calendar year.	Example: For January 5–11, 1997, &WeekNo will return Week 2.
&Year	Name of the current year in four-digit format.  Also returns all years included in a date range for the report in the <b>Calendar Report Options</b> dialog box.	<b>Example (single value):</b> 2000. <b>Example (range):</b> If the date range is set as 11/01/96 to 03/30/98, &Year will return all years that fall within the date range; that is, 1996, 1997, 1998.

**Example: Using Macros to Define Break Fields**

Use the &suppfile macro to define break fields and filter expressions in reports that will report on contact-related data stored in CAL.DBF, CONTSUPP.DBF, or CONTHIST.DBF. &suppfile can also specify a rectype parameter to return a particular record type from the specified file.

The &suppfile macro can contain two or three values, as shown in the following table.

<b>Database</b>	<b>Macro</b>	<b>Rectypes</b>
CAL	&suppfile="ca "	a, c, t, d, m, s, o
CONTSUPP	&suppfile="cs "	c, p, r, l, o
CONTHIST	&suppfile="ch "	a, c, t, d, m, s, o

The first two letters of the macro specify the database file; for example, &suppfile="cs" designates the CONTSUPP database file. To generate information from the Detail tab before moving to the next contact record, use a section filter of &suppfile="csp".

To designate the corresponding sort header break field, append an &sort macro to the expression, such as

```
&sort2&suppfile="csp"
```

Use this expression to define the break field of a second sort header. Generally, only data fields from the database file specified by the macro would be used within that section of the report.

### Formatting a Report

Using Layout toolbar icons, you can apply a variety of formatting options—such as text justification, borders, and color—to objects in the report template. Each of these icon commands is described on the following pages. Other ways to execute a command, such as selecting a menu option, are also described.



#### Define Report Settings

Each report has default settings for margins, ruler, and date format. To specify different parameters for your custom report, click , press **F7**, or select **Report Settings|Options** from the Layout local menu. The **Report Parameters** dialog box appears.

Report Parameters dialog box

Margins (inches)

Left: .25 Right: .25

Top: .25 Bottom: .25

Ruler Selection

Hide

Inches

Centimeters

Default Date Format

MM/DD/YY

DD/MM/YY

Print Trial Records

OK Cancel

The **Report Parameters** dialog box contains the following options:

- Margins** Specifies left, right, top, and bottom margins in inches.
- Default Date Format** Specifies date format as *either* MM/DD/YY *or* DD/MM/YY where MM specifies month, DD specifies day, and YY specifies year.
- Ruler Selection** Selects an onscreen ruler in inches or centimeters. The ruler can also be removed, or hidden, from the onscreen display.
- Print Trial Records** Check this box to print trial records prior to running the full report. This option is useful for running a test printing to adjust paper feed through a printer before sending all the records to preprinted forms or address labels.

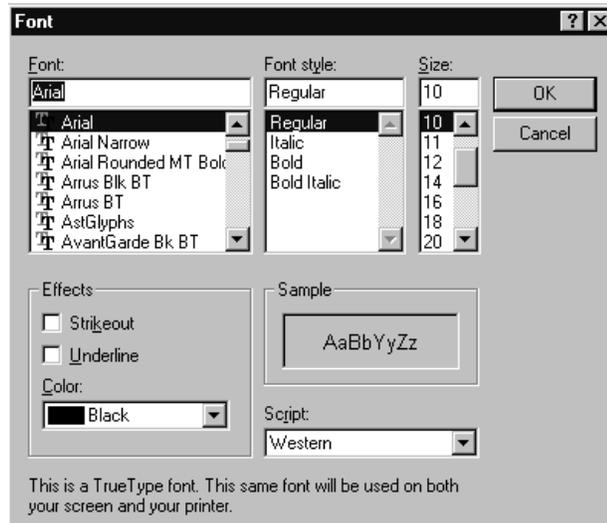
When done, select **OK**. The **Report Parameters** dialog box closes, and the changes are applied to the template.

### A

#### Select a Font

In GoldMine reports, the default font is Arial. To change the font, select the item, then *either* click **A**, press **ALT - F10**, or select **Edit|Fonts** from the Layout local menu. The **Font** dialog box appears.

Font dialog box



The **Font** dialog box contains the following options:

**Font** Selects a typeface from the list of fonts installed on your system.

**Font Style** Selects regular, *italic*, **bold**, or **bold italic**.

**Size** Selects a point size to apply to the characters in the object.

**Strikeout** ~~Strikes out~~ characters in the object.

**Underline** Underlines characters in the object.

**Color** Click on the down arrow to display a menu of available colors. Select the color that you want to apply to text in the object.

When done, select **OK**.



---

On the Layout toolbar, **B**, **I**, and **U** offer shortcuts to applying font attributes. Each of these icons is described below.

---



#### **Make Characters Bold**

To make text or numbers in a selected object bold, select the object, then click on the Bold icon. All characters in the selected object become bold.



#### **Italicize Characters**

To italicize text or numbers a selected object, select the object, then click on the Italic icon. All characters in the selected object are italicized.



#### **Underline Characters**

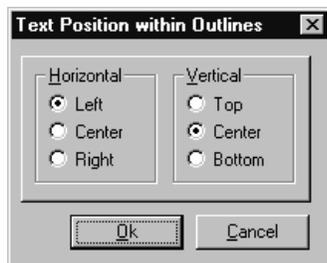
To underline text or numbers in a selected object, select the object, then click on the Underline icon. All characters and spaces between characters in the selected object are underlined.



### Position Characters within an Object

To adjust the horizontal and vertical alignment of characters within an object, select the object that you want to modify, then click , press **CTRL** - **P**, or select **E**dit|**P**osition Text from the Layout local menu. The **Text Position within Outlines** dialog box appears.

*Text Position within Outlines dialog box*



Each option aligns characters relative to the outline of the selected object. For example, the left horizontal option aligns characters to the left outline of the selected object. Click on the dialog button(s) corresponding to the horizontal and vertical alignment to realign the characters. When done, select **O**k.



---

Using GoldMine, you can arrange selected template items to align with each other, or to be spaced evenly on a page. You can also make selected template items the same width and/or height. This automatic alignment and sizing helps a designer to achieve a professional-looking report.

To select a criterion by which selected template items are aligned with each other, select the items, display the local menu, then select **A**rrange|**A**lign.

To position items at equally spaced horizontal or vertical intervals on a page, select the items, display the local menu, then select **A**rrange|**E**ven Spacing. To size template items equally either by width or height, select **A**rrange|**E**ven Sizing.

---



### Left-Justify Block

To align text or numbers in a block by the left edge (ragged right edges), select the block, then click .



### Center Block

To place text or numbers in the center of a block (ragged left edges and right edges), select the block, then click .

**Right-Justify Block**

To align text or numbers in a block by the right edge (ragged left edges), select the block, then click .

**Align Left**

To align selected items to the left edge, drag the mouse to touch all items to be aligned, then click .

**Align Vertical Center**

To align selected items vertically along a center point, drag the mouse to touch all items to be aligned, then click .

**Align Right**

To align selected items to the right edge, drag the mouse to touch all items to be aligned, then click .

**Align Top**

To align selected items to the top, drag the mouse to touch all items to be aligned, then click .

**Align Horizontal Center**

To align selected items horizontally along a center point, drag the mouse to touch all items to be aligned, then click .

**Align Bottom**

To align selected items to the bottom, drag the mouse to touch all items to be aligned, then click .

**Even Width**

To make selected items the same width, drag the mouse to touch all items to be affected, then click .

**Even Height**

To make selected items the same height, drag the mouse to touch all items to be affected, then click .



### Even Vertical Spacing

To align selected items with even vertical spacing, drag the mouse to touch all items to be aligned, then click .



### Even Horizontal Spacing

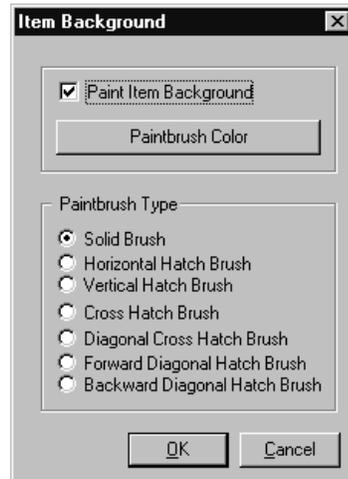
To align selected items with even horizontal spacing, drag the mouse to touch all items to be aligned, then click .



### Select a Fill Color

You can apply color and texture to the background of any selected object. To change the background color of an object, click .

*Item Background dialog box*



The **Item Background** dialog box contains the following options:

#### **Paint Item Background**

Fills the background of the text object with the selected color.

#### **Paintbrush Color**

Displays the **Color** dialog box.

**Paintbrush Type** Select a texture from seven options to apply to the background fill of the selected block.

When done, select **OK**. GoldMine applies the selected fill color and/or texture to the block.

### ***Adding Graphics to a Report***

Using Layout toolbar icons, you can insert graphic files in a report template and create graphics to enhance the appearance and usability of a report. Each of these icon commands is described on the following pages. Other ways to execute the command, such as menu options, are also described.



#### **Insert Picture**

You can import any bitmap .BMP file into your report layout.

To import a .BMP file:

Create or select an object into which you want to place the graphic file, then click  on the Layout toolbar, press **[ALT] - [F8]**, or select **Insert|Picture** from the Layout local menu. The **Open** dialog box appears.

**Open dialog box**



To select a graphic, *either*:

- In the **File name** field, type the path and file name for the .BMP file
- Select the directory where the graphic is located, select the graphic that you want to import into the form template, then select **Open**.

GoldMine places the graphic into the selected section. The graphic object has handles that you can use to size the graphic.



### Insert a Line

The line function inserts a line object into a report template. You can create horizontal, vertical, or diagonal lines. You can control the color, thickness and style of each line, size of the surrounding frame, and the background color of the frame.

To insert a line in the report form template, you can click , press **CTRL** - **F9**, or select **Insert|Line** from the Layout local menu to place a line on the template.

An empty box appears. Move the mouse to position the box where you want the line to appear, then click on the left mouse button to leave the box in place.

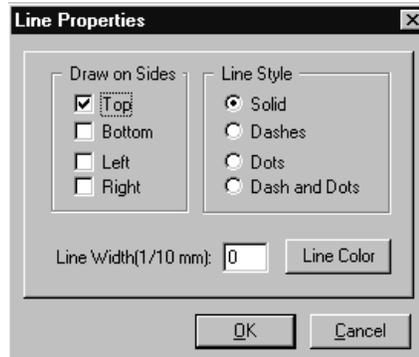


### Apply an Outline

By default, objects have no border. You can create a border to outline any object, select a color to fill the border, and apply a line color and style for the border.

To specify attributes for a border that will outline a selected object, you can click , press **CTRL** - **O**, or select **Edit|Outlines** from the Layout local menu. The **Line Properties** dialog box appears.

*Line Properties dialog box*



The **Line Properties** dialog box contains the following options:

- Draw on Sides** Places an outline on the top, bottom, left, and/or right sides of the object.
- Line Style** Creates a solid line, or a line composed of dashes, dots, or dashes and dots.
- Line Width** Specifies the width of the line in increments of 1/10<sup>th</sup> millimeter.
- Line Color** Displays the **Color** dialog box. Click on the color that you want to apply to the line, then select **OK**.

When done, select **OK**. The selected object appears with a border that has the specified attributes.

## ***Editing Report Templates***

Any GoldMine report template can be modified. Using the form designer, a developer can add new fields as well as change attributes or parameters within a selected object. This section contains information about modifying objects. To add new fields to an existing template, see “Organizing Data in a Report” on page 108.

### ***Changing Parameters for Field Types***

You can change a variety of parameters for each field type:

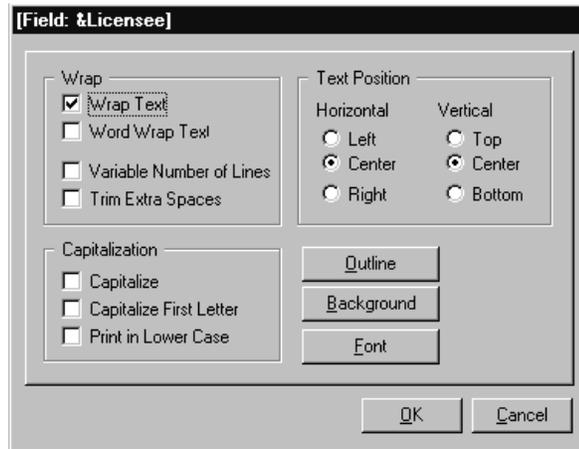
- Text
- Numeric
- Float
- Logical
- Date

GoldMine assigns default values to each field-type value. Changes made in field parameters dialog boxes apply to individual fields.

### Changing Text Field Parameters

To change settings in a text field, select the field, then double-click inside the field. The **text field parameters** dialog box for the selected field appears.

**Text field parameters dialog box**



The **text field parameters** dialog box contains the following options:

- Wrap Text** Sends, or wraps, text that exceeds the field width to the next line. A word that reaches the end of the field width will be broken and the remaining letters sent to the following line.
- Word Wrap Text** Sends, or wraps, text that exceeds the field width to the next line by breaking the line at the last complete word. That is, each line contains only complete words.
- Variable Number of Lines** Allows the field dimensions to change with the actual amount of word-wrapped data entered. As a good design practice, try to size the field object to contain the largest estimated text entry.
- Trim Extra Spaces** Removes extra spaces that may be left over at the end of the field. For example, when creating address labels, GoldMine removes extra spaces allowed in the **City** field to accommodate entries of varying lengths without leaving gaps between the city entry and state entry. Both Indianapolis, IN and Miami, FL appear with the correct number of spaces between city and state.

**Text Position** Specifies the horizontal and vertical positions where you want the text placed within the text field.

**Capitalization** Changes text letters to upper-case and/or lower-case as follows:

- **Capitalize:** converts all letters of each word in the field to upper-case.
- **Capitalize First Letter:** converts the first letter of each word in the field to upper-case.
- **Print in Lower Case:** converts all letters of each word in the field to lower-case.

**Outline** Displays the **Line Properties** dialog box, as shown in the figure on page 149. Click on the color that you want to apply to the line, then select **OK**. The **Color** dialog box closes, and the **Line Properties** dialog box appears.

**Background** Displays the **Item Background** dialog box that contains options for color and texture that can be applied to the background of the object.

On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Item Background** dialog box, see page 147.

**Font** Displays the **Font** dialog box that contains options for selecting a typeface from the list of fonts installed on your system.

On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Font** dialog box, see “Select a Font” on page 143.

When done, select **OK**. The attributes are applied to the selected text field as specified.

### Changing Numeric Field or Float Field Parameters

To change settings in a selected numeric field or float field, double-click inside the field. The **numeric/float field parameters** dialog box *for the selected field* appears.

**Numeric/  
Float field  
parameters  
dialog box**

The dialog box is titled "[Field: CALC->IN1DAY]". It is divided into several sections:

- Numeric Format:** Includes fields for Negative Sign Prefix (containing "-"), Negative Sign Suffix, Positive Sign Prefix, Positive Sign Suffix, # of Decimal Places (set to 0), and Currency Symbol.
- Text Position:** Includes radio buttons for Horizontal (Left, Center, Right) and Vertical (Top, Center, Bottom).
- Footer Fields:** Includes a Summarization Type dropdown set to "Total" and a checkbox for "Retain Value After Printing".
- Options:** Includes checkboxes for "Suppress Zero Values", "Pad with Zeroes", and "Use Comma Format" (checked).
- Buttons:** Includes buttons for "Outline", "Background", "Font", "OK", and "Cancel".

The **numeric/float field parameters** dialog box contains the following options:

- Negative Sign Prefix** Places a symbol before a number with a negative value. For example, to display a negative number within angle brackets, enter < in the **Negative Sign Prefix** field, and > in the **Negative Sign Suffix** field. To designate a negative number by -, enter - in this field only.
- Negative Sign Suffix** Places a symbol after a number with a negative value. For example, to display a negative number within angle brackets, enter < in the **Negative Sign Prefix** field, and > in the **Negative Sign Suffix** field. To not place a symbol after a negative numeric value, leave this field blank.

<b>Positive Sign Prefix</b>	Places a symbol before a number with a positive value. For example, to display a positive number within parentheses, enter the open parenthesis symbol ( in the <b>Positive Sign Prefix</b> field, and enter the closed parenthesis symbol ) in the <b>Positive Sign Suffix</b> field. To place no symbol before a positive numeric value, leave this field blank.
<b>Positive Sign Suffix</b>	Places a symbol before a number with a positive value. For example, to display a positive number within parentheses, enter the open parenthesis symbol ( in the <b>Positive Sign Prefix</b> field, and the closed parenthesis symbol ) in the <b>Positive Sign Suffix</b> field. To place no symbol after a positive numeric value, leave this field blank.
<b># of Decimal Places</b>	Specifies the number of digits that can be entered to the right of the decimal point.
<b>Currency Symbol</b>	Specifies a currency symbol, such as \$, £, or ¥.
<b>Suppress Zero Values</b>	Suppresses printing any field with a zero value.
<b>Pad with Zeroes</b>	Inserts zeroes before the actual field value if the value uses fewer spaces than the defined field width.
<b>Use Comma Format</b>	Separates thousands with commas. For example, 123456 appears as 123,456.
<b>Text Position</b>	Specifies the horizontal and vertical positions where you want the text placed within the text field.

**Summarization Type** Specifies the type of summarization to perform on the field. This can include any of the following summarization types:

- **Value:** returns the last value from the last record printed.
- **Totals:** cumulative field value of all records in the section.
- **Average:** cumulative field value of all records in the section divided by the number of records in the section.
- **Count:** generates the total number of records in a section.
- **Max:** computes the maximum value of all records in a section.
- **Min:** computes the minimum value of all records in a section.

This option applies only to numeric fields or float fields used in a footer section.

**Retain Value After Printing** Prints running totals instead of clearing the internal accumulator after a printing. This option applies only to numeric fields or float fields used in a footer.

**Outline** Displays the **Line Properties** dialog box that contains options for specifying attributes for one or more lines that can be applied to the border of the field. For a description of options in the **Line Properties** dialog box, see “Apply an Outline” on page 149.

**Background** Displays the **Item Background** dialog box that contains options for color and texture that can be applied to the background of the object.

On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Item Background** dialog box, see page 147.

**Font** Displays the **Font** dialog box that contains options for selecting a typeface from the list of fonts installed on your system.

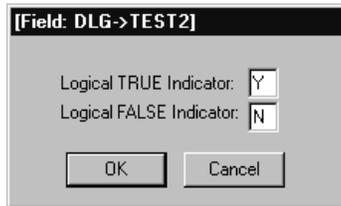
On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Font** dialog box, see “Select a Font” on page 143.

When done, select **OK**. The attributes are applied to the selected numeric field or float field as specified.

### **Changing Logical Field Parameters**

To change settings in a logical field, select the field, then double-click inside the field.

*Logical field parameters dialog box*



The **logical field parameters** dialog box contains the following options:

**Logical TRUE Indicator** Specifies the symbol that designates a TRUE value for a logical field. The default is **Y**.

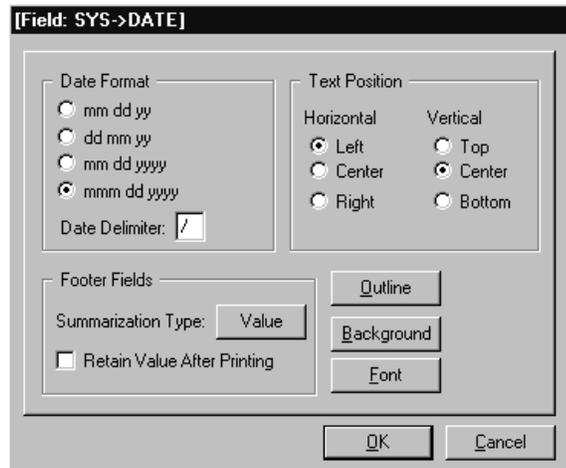
**Logical FALSE Indicator** Specifies the symbol that designates a FALSE value for a logical field. The default is **N**.

When done, select **OK**. The symbol for the TRUE value appears in the selected logical field.

### Changing Date Field Parameters

To change settings in a date field, select the field, then double-click inside the field.

*Date field parameters dialog box*



The **date field parameters** dialog box contains the following options:

**Date Format** Specifies the format in which the date appears in the report for the selected field. Select one of the following formats:

This format . . .	. . .appears as . . .
mm dd yy	12 19 99 (December 19, 1999)
dd mm yy	19 12 99 (19 December 1999)
mm dd yyyy	10 31 1999 (October 31, 1999)
mmm dd yyyy	Oct 31, 1999

**Date Delimiter** Specifies symbol that separates month, day, and year in a date. The default is /.

**Text Position** Specifies the horizontal and vertical positions where you want the text placed within the text field.

**Summarization Type** Specifies the type of summarized values to be used in the footer field. The footer can include any of the following summarization types:

- **Value:** returns the last value from the last record printed.
- **Totals:** cumulative field value of all records in the section.
- **Average:** cumulative field value of all records in the section divided by the number of records in the section.
- **Count:** generates the total number of records in a section.
- **Maximum:** computes the maximum value of all records in a section.
- **Minimum:** computes the minimum value of all records in a section.

This option applies only to numeric fields or float fields used in a footer.

**Retain Value After Printing** Prints running totals instead of clearing the internal accumulator after a printing. This option applies only to numeric fields or float fields used in a footer.

**Outline** Displays the **Line Properties** dialog box that contains options for specifying attributes for one or more lines that can be applied to the border of the field. For a description of options in the **Line Properties** dialog box, see page 149.

**Background** Displays the **Item Background** dialog box that contains options for color and texture that can be applied to the background of the object.

On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Item Background** dialog box, see page 147.

**Font** Displays the **Font** dialog box that contains options for selecting a typeface from the list of fonts installed on your system.

On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Font** dialog box, see “Select a Font” on page 143.

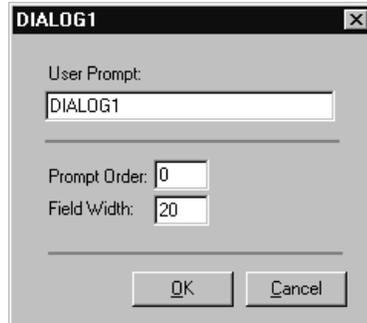
When done, then select **OK**. The attributes are applied to the selected date field as specified.

## Changing Dialog Field Settings

To change any settings in a dialog field, *either* press **CTRL - M**, *or* display the Layout local menu, then select **D**ialog Fields Table|**M**odify. The **Select Dialog Field** dialog box appears – see page 111.

Select the listed dialog field that you want to modify, then select **OK**.

*dialog field  
parameters  
dialog box*



The **dialog field parameters** dialog box contains the following options:

- User Prompt** Specifies a prompt of up to 30 characters that will appear before GoldMine prints the report. The prompt enables the user to enter any needed input prior to printing the report.
- Prompt Order** Determines the order that the field prompts appear to the user when a report template contains more than one dialog field.
- Field Width** Specifies the field width in number of characters.

When done, select **OK**. The new settings are entered for the dialog field.

## Deleting a Dialog Field

To be completely removed, a dialog field may need to be deleted from up to three places:

- Report template
- Calculation expression
- Dialog table

A dialog field must be removed from the report template and any calculation expression before the field can be deleted from the dialog table.

To remove a selected dialog field from the report template, press **DEL**.

To remove a selected dialog field from the dialog field table, press **CTRL - D**. The **Select Dialog Field** dialog box appears, as shown on page 111.

Select the dialog field name that you want to delete. Select **OK**. The dialog field name is removed from the dialog fields table.

### Changing Section Parameters

Each section in a report template has a variety of attributes that can be modified:

- Space compression and page advance parameters
- Section selection criteria (filters)
- Break field
- Borders
- Background fill

To apply any of these parameters, double-click within a selected section.

*section  
parameters  
dialog box*

**Sort 1 Header**

Compress Space Before the First Item

Compress Space After the Last Item

Advance Page Before Printing the Section

Advance Page After Printing the Section

Reprint Titles on Every Page

Number of Records Across the Page:

Filter   Outlines   OK

Break Field   Background   Cancel

The **section parameters** dialog box contains the following options:

- |   |  |
|---|--|
| <b>Compress Space Before the First Item</b>     | Compresses the space between the beginning of the section and the object at the top of the section.  |
| <b>Compress Space After the Last Item</b>       | Removes the space after the lowest object of the section. This option suppresses the space after smaller word-wrapped text objects to allow large word-wrapped fields.       |
| <b>Advance Page Before Printing the Section</b> | Advances to the next page before the beginning of the section.   |
| <b>Advance Page After Printing the Section</b>  | Advances to the next page after printing the section.  |
| <b>Reprint Titles on Every Page</b>             | Prints titles on every page. This option is available for sort sections only.  |
| <b>Number of Records Across the Page</b>        | Specifies the number of records that can be placed across the report template. This option is useful for printing labels. This option is available for detail sections only. |
| <b>Filter</b>                                   | Displays the <b>Section Selection Criteria</b> dialog box – see “Working with Section Selection Criteria” on page 163.   |
| <b>Outlines</b>                                 | From the section parameters dialog box, displays the <b>Line Properties</b> dialog box, as shown in the figure on page 149.  |



There are two other ways to access the **Line Properties** dialog box:

- Display the Layout local menu, then select **Edit|Outlines**
  - Press **CTRL - O**
-

**Break Field** Displays the **Break Field** dialog box—see “Using a Break Field to Group Data in a Section” below.

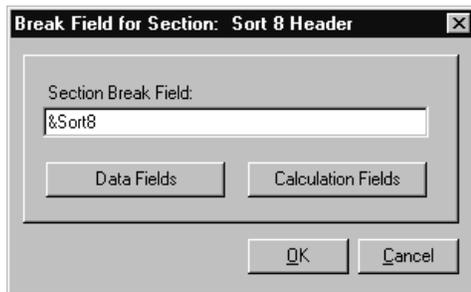
**Background** Displays the **Item Background** dialog box, as shown in the figure on page 147.

When done, select **OK**.

#### **Using a Break Field to Group Data in a Section**

You can use a break field to define how data is grouped together in your report. When you select **Break Field** in the **section parameters** dialog box, the **Break Field for Section** dialog box appears.

**Break Field for Section dialog box**



The **Break Field for Section** dialog box contains the following options:

**Section Break Field** Displays the defined section break field. A section break field value can be a calculated field.

**Data Fields** Displays the **Select a Field** dialog box, as shown in the figure on page 127. When you select a field, select **OK**. The selected field appears in the **Expression** field of the **Break Field for Section** dialog box.

**Calculation Fields** Displays the **expression** dialog box. The **expression** dialog box contains the same options as those discussed for **Filter**—see page 125.

A section break field can be a calculated field. A calculated section break field can generate complex sort breaks.

When done, select **OK**. The selected section break field is applied to the section.

When done, select **OK**. The break field is applied to the section as specified.

#### **Working with Section Selection Criteria**

You can *either* type an expression in the **Expression** field, *or* build an expression using items provided by the five button functions. Each of the button functions is described below.

**System Field** System fields provide information that GoldMine generates automatically, such as calendar date, time, page number, record count, and paragraph break field. The calendar date and page number fields are typically printed on the page header or the page footer. The paragraph break field can be used in a calculation expression to create multiple paragraph text (word-wrapped text).

Select a **System Field** from the **Section Selection Criteria** dialog box. The **System Field Selection** dialog box appears—see page 109.

**Dialog Field** Field that prompts the user for data before report generation. Dialog fields can also be included in the form. For example, you may create two dialog fields, `BEGIN_DATE` and `END_DATE` to prompt the user for the beginning and ending dates for the report. You can then print these two dates on the report header by inserting them in proper places. Dialog fields can be used as a report selection criteria.

To select a dialog field for the **Report Selection Criteria** dialog box, select **Dialog Field**. The **Select a Dialog Field** dialog box appears—see page 111.

Move the highlight to the field you want, then *either* select **OK**, *or* press . The selected field appears in the **Expression** field of the **Section Selection Criteria** dialog box.

When done, select **OK**. The selected field appears in the **Expression** field of the **Section Selection Criteria** dialog box.

**Data Field** Field associated with a data record, including memo fields.

To select a data field for the **Section Selection Criteria** dialog box, select **Data Field**. The **Select a Field** dialog box appears – see page 127.

When done, select **OK**. The selected field appears in the **Expression** field of the **Section Selection Criteria** dialog box.

**Operator** Specifies the action to be performed on the values or fields specified in the calculation expression. For example, in `Cal ->DATE>"06/01/99"`, the operator `>` specifies that only records with dates after June 1, 1999 may be included in the report.

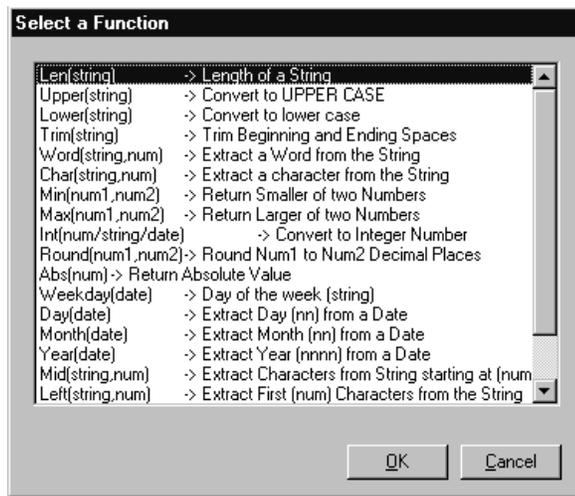
To select an operator for the **Report Selection Criteria** dialog box, select **Operator**. The **Select an Operator** dialog box appears – see page 128. The **Select an Operator** dialog box contains 21 operators. For a description of operators, see "Operators" on page 114.

Move the highlight to the operator you want, then select **OK**. The selected operator appears in the **Expression** field of the **Section Selection Criteria** dialog box.

**Function** Accepts a predefined number of arguments and returns a value of a predefined type.

To select a function for the **Section Selection Criteria** dialog box, select **Function**.

Select a Function dialog box

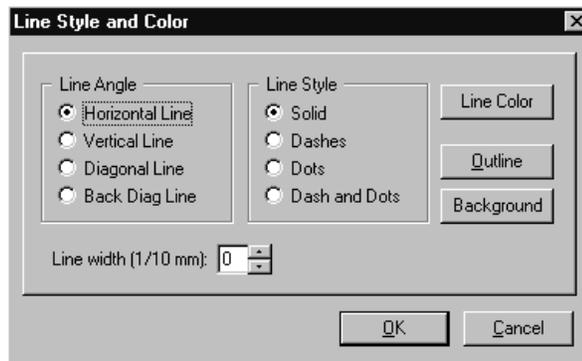


For a detailed discussion of available functions, see “Functions” on page 129. When done, then select **OK** to insert the function into the expression.

### Changing Line Style

To change the style of a line, double-click inside the line object.

Line Style and Color dialog box



The **Line Style and Color** dialog box contains the following options:

**Horizontal Line** Places a horizontal line in the object.

**Vertical Line** Places a vertical line in the object.

**Diagonal Line** Places a diagonal line that stretches from the upper-left-hand side of the object to the lower right-hand side of the object.

**Back Diag Line** Places a diagonal line that stretches from the lower-left-hand side of the object to the upper right-hand side of the object.

**Line Style** Creates a solid line, or a line composed of dashes, dots, or dashes and dots.

**Line Width** Specifies the width of the line in increments of  $\frac{1}{10}$ <sup>th</sup> millimeter.

**Line Color** Displays the **Color** dialog box. Select the color that you want to apply to the line, then select **OK**. The **Color** dialog box closes.

**Outline** Displays the **Line Properties** dialog box that contains options for attributes that can be applied to a border around the object.

On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Line Properties** dialog box, see page 149.

**Background** Displays the **Item Background** dialog box that contains options for color and texture that can be applied to the background of the object.

On the Layout toolbar,  also accesses this dialog box. For a description of options in the **Item Background** dialog box, see page 147.

When done, select **OK**. The specified attributes are applied to the line.

## ***Deleting Objects or Sections***

The procedure for deleting objects or sections of a report template is the same except for deleting a dialog field – to delete a dialog field, see “Deleting a Dialog Field” on page 159.

To remove a selected object from the report template, press **DEL** .

You must delete a higher level section before you can delete a lower level section, except for section footers. You can delete section footers in any order. However, a section footer must be removed before a section header.

To remove a section from the report template, click on the title bar of the section, then press **DEL** .

A prompt asks:

**Delete Current Section: [Section Name]?**

To delete the section, select **OK**.



# Handling Workflow with Automated Processes

GoldMine can automate workflow processes to perform a series of actions on the contact records in GoldMine's database. Automated Processes™ can perform tedious, repetitive tasks required in medium and longer-length sales cycles. Using Automated Processes, you can set up GoldMine to perform administrative and tracking duties, such as managing leads, generating direct mail, and validating data.

## **Why use Automated Processes?**

Automated Processes allow you to set up a series of *software agents*, or predefined actions, to be performed on all contacts, or groups of contacts, in the database. For example, using Automated Processes, each new record entered in the contact database can be assigned to automatically receive a letter that introduces your company, and informs the contact that a salesperson will be calling shortly. 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.

This example only begins to illustrate the functionality of GoldMine's Automated Processes. By using this tool, many of the tedious, repetitive operations typically performed on the contacts in the database can be automated as shown in the following examples.

## **Performing Administrative Tasks**

Using Automated Processes, you can create an "automated pipeline" through which prospects can be assigned to receive a series of written communications, including introductory letters, brochures and testimonials. Automated Processes can also monitor prospect records, checking for particular activities—such as an incoming call—that indicate the need for a salesperson to make a follow-up call. Alternatively, Automated Processes can automatically schedule a call to appear on a specified GoldMine user's

calendar five days after the prospect has been sent information. Using this selling method, GoldMine does all of the administrative work for your salespeople, who can concentrate on what they do best – selling.

### ***Managing Leads***

Using Automated Processes, new contact records entered into the database can be assigned to specific salespeople based on the contact's state of residence, area code, or any other user-defined criteria. Once the contact has been assigned, Automated Processes can then send the respective salespeople e-mail messages informing them of the new prospects in their territory.

### ***Following up on Contacts***

An Automated Process can be designed to “touch” customers that you have not heard from in six months, a year, or any period of time you define. These “dead contacts” can be sent letters reminding them of your product or service, surveying their satisfaction with your company, or notifying them of any information you desire.

### ***Sending Warranty Renewal Reminders***

An Automated Process can be created to automatically send a “warranty renewal” letter to customers whose warranties are due to expire within a specified amount of time. The Automated Process can also schedule a call back for a GoldMine user if the customer does not respond to the written reminder.

### ***Automating Direct Mail Campaigns***

An Automated Process can be used to automate direct mail campaigns. Each contact record attached to the direct mail Automated Process can receive a different letter depending on the information stored in the contact database.

### ***Validating Data***

An Automated Process can be used to automatically validate data entered into a new contact record. When an error is detected, an e-mail message can be sent to a supervisor for follow-up.



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For details on working with Automated Processes, see *Automated Processes for GoldMine 5.0*, which you can get from GoldMine's Web site at <http://www.goldmine.com>.

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## What is an Automated Process?

Throughout this section, an Automated Process will also be referred to as a *track*. Tracks consist of one or more *events*, which are the step-by-step instructions GoldMine must evaluate to perform a selected series of activities. Each event is composed of an *action* and a *trigger*. Actions, such as printing a letter or scheduling an activity, are performed based on predefined conditions, which are the triggers that cause the actions to be executed.

Consider this example of an event:

```
Wait 10 days, then print "Hello There Letter"
```

A complete track can contain many events similar to this example. To translate this statement into an event that GoldMine understands, it is necessary to separate the action and the trigger.

The action causes GoldMine to print a letter called "Hello There Letter." The action is performed based on a trigger. The action must wait for ten days to pass before the letter can be printed. In this case, the trigger is the passage of a specific duration of time. To determine when the action should be executed, GoldMine starts counting days *after the completion* of the prior event. If this event was the *first* event in the sequence, the event would start counting days based on when the track was attached.

### Event Sequences

Each track event has a *sequence number* that provides for the ordering of events within a track. You can think of an event's sequence number as being similar to a step number in a set of assembly instructions (as with a child's bicycle). GoldMine does not process a particular sequential event until all of the events with a lower sequence number have been processed.

For example, look at the following sequence of events:

Sequence	Event
100	Wait one day, then print letter "Thank you for Inquiry"
110	Wait seven days, then schedule a call back

When GoldMine processes this track, the "Thank you for Inquiry" letter will be printed one day after the track is started. Then, GoldMine can be set up to begin counting days for the event number 110 as soon as event 100 has been processed.

GoldMine can trigger actions based on a variety of conditions, such as the existence of a Calendar activity or completed History activity, the existence of a specific type of supplementary record saved with the contact record (such as an additional contact or detail record), or the value of a particular field in the contact record. Trigger conditions are discussed in “Adding Events to a Track” on page 185.

## ***Attaching Tracks to a Contact Record***

Before GoldMine can process a track, the track must be attached to the contact record(s) for which the actions are to be performed.

When a track is attached to a contact’s record, GoldMine stores information that indicates which tracks have been attached to the contact, as well as the next event to be processed for the contact record. When a track is initially attached to a contact’s record, the next event listed is always the lowest numbered event in the sequence; however, as a track is processed, this information will be changed to reflect the next step in the process. This is how GoldMine maintains the current status of each track attached to each contact’s record.

GoldMine can attach multiple tracks to any contact’s record. This allows you to process each contact in a variety of ways. For example, a track can be attached to a particular contact’s record because of a recent product inquiry, and at the same time, the contact can already be on another track because he previously purchased a product and the expiration of the warranty is being monitored so that a warranty extension can be offered.

GoldMine can *either* attach a track to a single contact record, *or* to multiple contact records. For details on attaching a track to one contact record, continue with “Attaching a Track to a Single Contact Record.” For details on attaching a track to multiple contact records, see “Attaching a Track to Multiple Contact Records on the facing page.

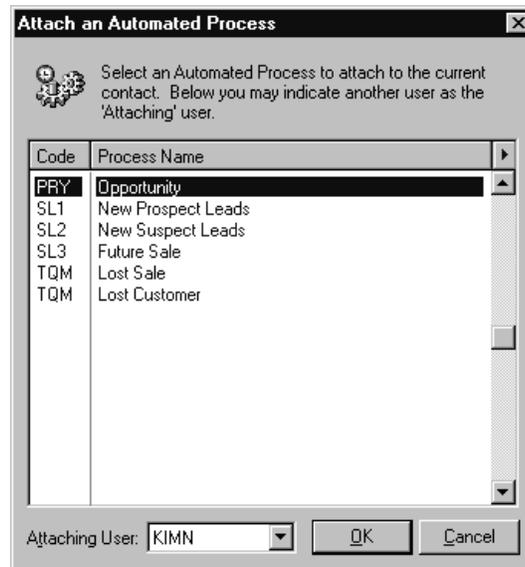
GoldMine provides a complete range of functionality that allows you to attach tracks to contact records, view a contact’s attached tracks, process tracks, and add and maintain tracks.

### ***Attaching a Track to a Single Contact Record***

To attach a track to the active contact record:

From the Main Menu, select **C**ontact|**A**ssign a Process.

***Attach an Automated Process dialog box***



Highlight the track in the **Attach an Automated Process** dialog box, then select **OK**.

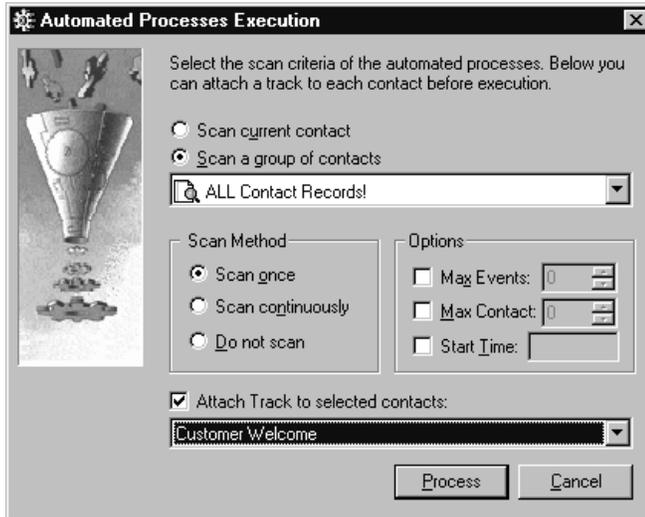
### ***Attaching a Track to Multiple Contact Records***

You can attach a selected track to all contact records. Unless a filter or group is activated, GoldMine attaches a specified track to all contact records in the open contact database. An attached Automated Process will be included in a transfer set when synchronizing – for details about remote synchronization, see *Synchronizing with GoldMine Sales and Marketing*.

To attach a track to multiple contact records:

From the Main Menu, select **T**ools|**A**utomated Processes|**E**xecute Processes.

**Automated Processes Execution dialog box**



In the **Automated Processes Execution** dialog box, select **Scan a group of contacts**, then select the set of contacts to which you want to attach the track from the drop-down list. For example, you can attach the track to **ALL Contact Records!** You can also select a filter or group to select a set of contacts. Select **Process** to begin attaching the track to the contact records. For information on defining other options in the **Automated Processes Execution** dialog box, see “Processing Tracks” on page 175.

To attach a track to a filtered or grouped set of contact records, activate the desired filter or group prior to selecting **Execute Processes**. GoldMine assigns the specified track to only those records that match the filter expression or belong to the group. For example, you might want to process all contact records entered on a given day by using a “New Lead” track.

### **Tracks Local Menu**

The **Tracks** tab is located on the second bank of the contact record’s tab bar. You can display the second bank of tabs by clicking on the blue-outlined tab at the right side of the tab bar.

The **Tracks** tab local menu is available from the browse window by *either* right-clicking, *or* pressing the spacebar. This local menu contains the following options:

**Attach Process** Displays the **Attach an Automated Process** dialog box, from which you can attach a track to the active contact record. To attach a track, highlight the desired track in the **Processes Listing** dialog box, then select **OK**.

- Remove  
Process** Removes the selected track from the active contact record. No further processing of the track will occur for the contact.
- Branch to  
Event** Displays the **Branch to Event** dialog box, from which you can select an event to trigger another event.
- Execute  
Processes** Displays the **Automated Processes Execution** dialog box, from which you can set the scan criteria for the track, and start processing the track for the active contact, or for all contacts.

## ***How Tracks are Processed***

A track can be processed whenever necessary. GoldMine provides functionality that allows you to process tracks for all contact records, a filter or group of contact records, or a specific number of contact records in the contact database.

During processing, GoldMine scans the database for those contact records with attached tracks. When an attached track is found, GoldMine first determines if the track contains any preemptive events (see “Adding Events to a Track”) and then processes them. Next, GoldMine evaluates the trigger condition of the current sequential event for the contact record to determine if the event should be processed. If the event is triggered, the event’s action is performed, and the next sequential event is evaluated. When the track no longer has any outstanding events to be triggered, GoldMine looks at the contact record’s next attached track. If no track is present, GoldMine examines the next contact record.

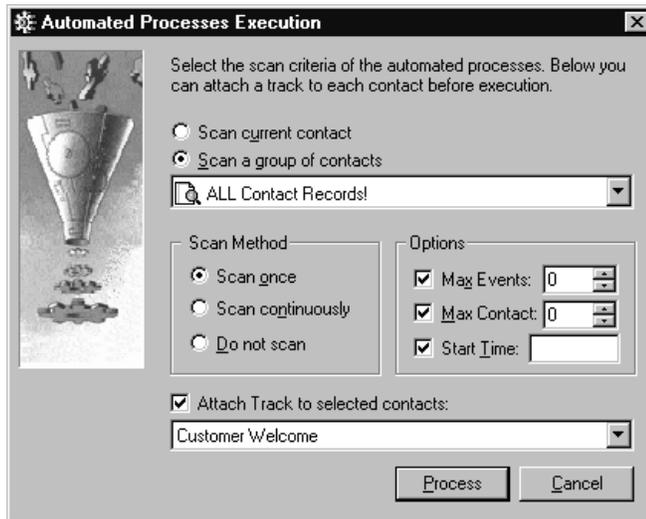
### ***Processing Tracks***

GoldMine processes all tracks attached to records in the contact database with a single function.

To process tracks:

From the Main Menu, select **Tools|Automated Processes|Execute Processes**.

**Automated Processes Execution dialog box**



The **Automated Processes Execution** dialog box contains the following options:

- Scan current contact** Processes only the active contact, then returns to an idle mode.
- Scan a group of contacts** Click  to display a drop-down list, from which you can select **ALL Contact Records!**, or select a filter or group as the basis for selecting contacts.
- Scan once** GoldMine scans the contact database, or the contacts selected by a filter or group, and processes all tracks. When processing is done, GoldMine returns to an idle mode.
- Scan continuously** GoldMine scans the contact database and process all tracks, then repeats the process continuously. Continuous processing allows you to set up a workstation on the network that continuously scans for triggered events, and immediately performs the event actions. Continuous processing can be interrupted at any time by selecting **Stop** in the **GoldMine Process Monitor** dialog box – see “Monitoring Tracks” on page 177.
- Do not scan** GoldMine attaches the track, but does not scan the contact record(s).

**Max Events** Maximum number of events (up to 99,999) that will be processed during this scan.

**Max Contact** Maximum number of contact records (up to 99,999) that will be evaluated during this processing scan. For example, you may want to process only 25 records a day, and thereby control the volume of letters printed or calls scheduled, etc.

**Start Time** Sets a time at which GoldMine will start processing the track. You can use this option to take advantage of periods of lower demand to run the process.

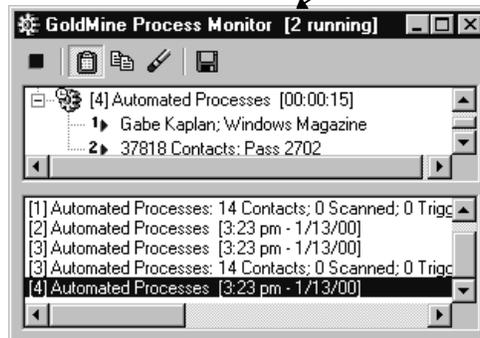
To access the time field, click in the check box. You can specify a time by *either* typing in a time—including a for a.m. or p for p.m.—*or* by pressing **F2** to display the graphical clock, from which you can select a time.

To start executing an Automated Process, select **Process**. During processing, GoldMine examines each contact record in the database as specified in the **Automated Processes Execution** dialog box. A display of scanning and processing activities appears in the **GoldMine Process Monitor**—continue with “Monitoring Tracks.”

### Monitoring Tracks

Once GoldMine starts processing the track(s), the **Process Monitor** appears. GoldMine will run Automated Processes as a background process, so that the active contact record overlays the **GoldMine Process Monitor**. To bring the **GoldMine Process Monitor** to the front, click on any part of the window.

GoldMine  
Process Monitor



Title bar displays the number of tracks that are processing during the cycle

The **GoldMine Process Monitor** contains the following icons:

- |   |                                 |   |                    |
|---|---------------------------------|---|--------------------|
|  | Stop selected process           |  | Toggle log display |
|  | Copy logs to Windows' Clipboard |  | Clear logs         |
|  | Save to GoldMine's System Logs  |   |                    |

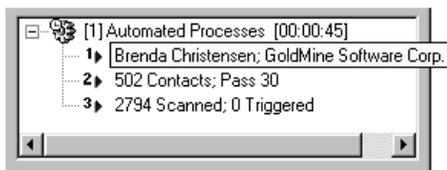
The **GoldMine Process Monitor** displays the number of tracks currently processing in the title bar.

GoldMine presents information about the executing processes in two panes:

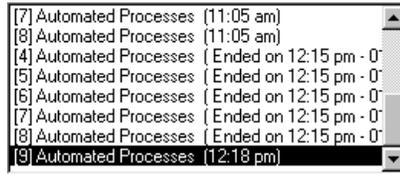
*upper pane* Displays the elapsed time, the currently processing contact record, the total number of records scanned, the number of events triggered, and the title of the currently processing track. You can expand the size of the upper pane by dragging the lower bar of the pane. The following figure shows an example of the upper pane information display.



You can get "static display" data about the Automated Process or the contact currently being processed by positioning your cursor over the item. GoldMine displays information in a yellow flyout box, as shown in the following figure.



*lower pane* Displays the track entries for the time that GoldMine started processing the track, and when GoldMine finished processing the track. The following figure shows an example of the lower pane display.



#### **GoldMine Process Monitor Local Menu**

The **GoldMine Process Monitor** has a local menu that is available from the browse window of the upper pane. To display the **GoldMine Process Monitor** local menu, right-click in the upper pane.

The **GoldMine Process Monitor** local menu contains the following options:

- Stop** Stops processing the current track for the current contact.
  
- Stop All Processes** Stops processing all tracks for all contacts.
  
- Copy Logs to Clipboard** Copies the log entries displayed in the lower pane to Windows' Clipboard. You can then paste the data into a word processor, such as Word, from which you can print the data.
  
- Clear Logs** Deletes the log entries in the lower pane of the **GoldMine Process Monitor**.
  
- Close When All Processes Are Done** Closes the **GoldMine Process Monitor** when all tracks have finished processing.

## Using a Filter or Group while Processing Tracks

You can use **Automated Events Processing** to process a subset of the contact database based on a filter or group. To work with a subset, you can *either*:

- Activate the filter or group *before* you execute the Automated Process – see “Activating a Filter” or “Activating a Group” in the online Help. If a filter or group has been activated, you can select **Scan a group of contacts** in the **Automated Processes Execution** dialog box, then select **ALL Contact Records!**
- Select **Scan a group of contacts** in the **Automated Processes Execution** dialog box, then selecting a filter or group from the drop-down list.

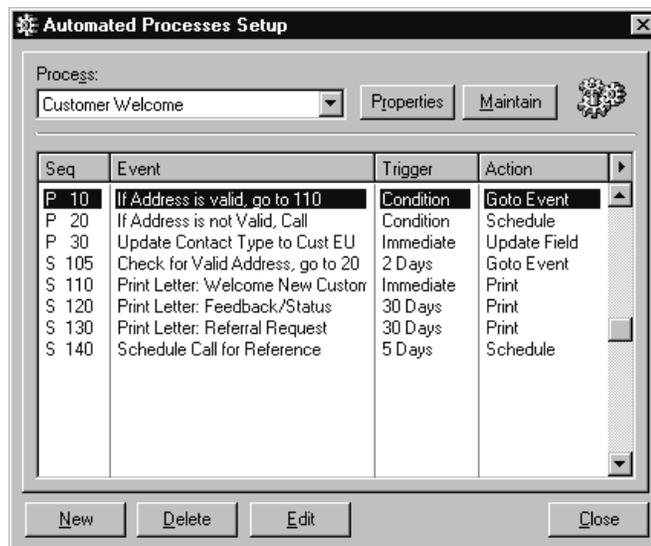
## Setting up an Automated Process

You can add, delete, or modify Automated Processes from the **Automated Processes Setup** dialog box.

To set up Automated Processes:

From the Main Menu, select **T**ools|**A**utomated Processes|**S**et up Automated Processes.

*Automated Processes Setup dialog box*



The **Automated Processes Setup** dialog box contains the following options:

- Process** Name of the Automated Process. To select a different track, select a track from the drop-down list.
  
- Properties** Displays the **Process Properties** dialog box, from which you can define settings for the Automated Process record – see “Defining Process Properties” on page 182.
  
- Maintain** Displays the **Processes Listing** dialog box, from which Automated Processes can be added or deleted. You can also change the descriptive name of an Automated Process from this dialog box.

The center portion of the **Automated Processes Setup** dialog box contains a browse listing of the events defined for the track highlighted in the **Process** field. The browse listing contains one record for each event defined in the track. The following information is displayed for each event:

- Seq** Sequence number for each event. The type of each event (preemptive or sequential) is displayed to the left of the sequence number.
  
- Event** Descriptive name assigned to each event.
  
- Trigger** Type of trigger condition assigned to each event.
  
- Action** Type of action assigned to each event.

The **Automated Processes Setup** dialog box contains the following command buttons:

- New** Displays the **Event Properties** dialog box, from which you can add an event to the track – see “Adding Events to a Track” on page 185.
  
- Delete** Deletes the highlighted event.

**Edit** Displays the **Event Properties** dialog box, from which you can modify settings for an event – see “Adding Events to a Track” on page 185.

**Close** Closes the **Automated Processes Setup** dialog box.

### Defining Process Properties

To add a track, or modify an existing track, you must define settings for the track.

To define settings for a track:

From the **Automated Processes Setup** dialog box, select **Properties**.



You can also define settings for a track from the **Processes Listing** dialog box by selecting **Properties**.

**Process Properties dialog box**

Process Name: Customer Welcome

Process Code: MKT Owner: ASHLEY

Process Options

- Allow only one attachment of this process per contact
- Allow users to attach this process
- Execute this process immediately when attached by a user
- Execute this process only on complete scans
- Restart this process automatically when it ends
- Attach this process to all new contact records

OK Cancel

The **Process Properties** dialog box contains the following options:

**Process Name** Descriptive name assigned to each track that should indicate the function or purpose of the track.

<b>Process Code</b>	User-defined value assigned to each track. Tracks are arranged alphabetically by the <b>Process Code</b> value in both the <b>Processes Listing</b> browse display, and the <b>Automated Processes Setup</b> dialog box.
<b>Owner</b>	User who controls the track.
<b>Allow only one attachment of this process per contact</b>	Prevents multiple attachments of the same track to a contact's record.
<b>Allow users to attach this process</b>	Grants permission to other users to select and attach the track.
<b>Execute this process immediately when attached by a user</b>	Starts processing the track as soon as a user attaches the track to one or more contact records.
<b>Execute this process only on complete scans</b>	Prevents GoldMine from executing a track attached to a single contact record.  This option is useful to restrict track execution to a specific system. For example, if a print action requires a special printer that is connected to one workstation, selecting this option <i>and</i> <b>Execute this process immediately when attached by a user</b> will prevent the printing track to run from any workstation other than the workstation connected to the special printer.
<b>Restart this process automatically when it ends</b>	Reattaches the track as soon as processing for the track has completed.

**Attach this process to all new contact records**

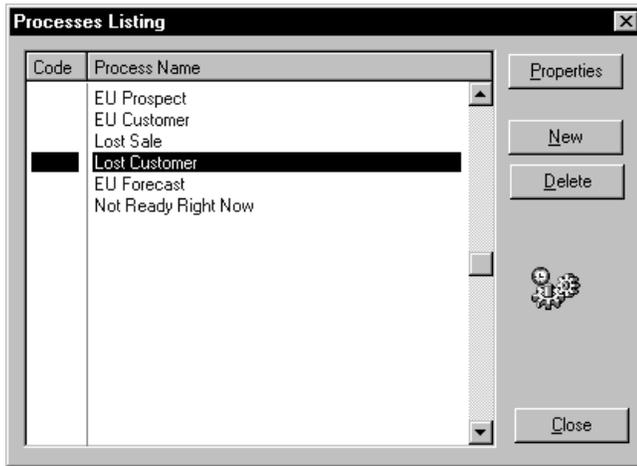
GoldMine automatically attaches the track to each new contact record.

When done defining properties for the process, select **OK**. The process name appears in the **Process** field of the **Automated Processes Setup** dialog box.

### **Maintaining Tracks**

You can add and modify tracks from the **Processes Listing** dialog box. To display this dialog box, select **Tools|Automated Processes|Set up Processes**, then select **Maintain**.

**Processes Listing dialog box**



The **Processes Listing** dialog box contains one record for each defined Automated Process. The following information is displayed for each track:

**Code** User-defined value assigned to each track. Tracks are arranged alphabetically by the **Code** value in both the **Processes Listing** browse display, and the **Automated Processes Setup** dialog box.

**Process Name** Descriptive name assigned to each track. The **Process Name** is usually assigned when the track is created, and should indicate the function or purpose of the track.

The **Processes Listing** dialog box includes the following buttons:

- Properties** Edits the highlighted track. When this button is selected, the **Process Properties** dialog box appears, in which you can edit the **Process Name** and **Process Code** – see “Defining Process Properties” on page 182.
  
- New** Adds a new track to the **Processes Listing** dialog box. When this button is selected, the **Process Properties** dialog box appears, in which you can enter the **Process Name** and **Process Code**.
  
- Delete** Deletes the highlighted track. Any events that have been defined for the track are deleted as well.
  
- Close** Closes the **Processes Listing** dialog box.

### ***Adding Events to a Track***

Once a new track has been added to the **Processes Listing** dialog box, individual events can be added to the track.



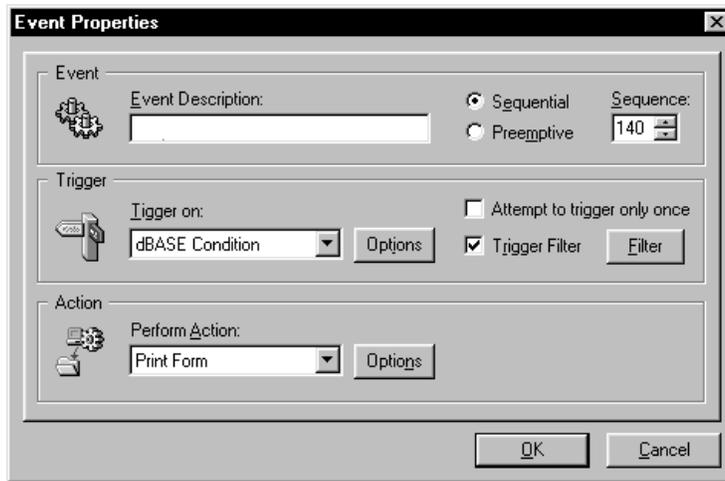
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Before defining new events, make sure that you have selected the Automated Process to which you wish to add these events. The name of the Automated Process should appear in the **Process** field.

---

Once you select *either* **New** or **Edit** in the **Automated Processes Setup** dialog box, GoldMine displays the **Event Properties** dialog box, from which you can add or modify track events.

Event Properties dialog box



The **Event Properties** dialog box divides settings for an event into three sections: **Event**, **Trigger**, and **Action**.

### Defining an Event

You can define the basic attributes for the event in the **Event** section. The **Event** section contains the following options:

**Event Description** Displays a descriptive name of the track's event in the **Automated Processes Setup** dialog box, as well as in the **Next Event** column on the **Tracks** tab of the contact record.



---

Be sure to enter an **Event Description** appropriate for the type of event being added to the track. GoldMine uses the entry in the **Event Description** field for the activity **Reference** field when the event's action is a **Scheduled Activity**, and for the history **Reference** field when the event action is a **Create History** action, *if* the **Reference** field is blank.

---

**Sequential** Events that are processed in order of their sequence number; lower numbered events are processed before higher numbered events. Sequential events must be numbered between 100 and 999.

If a trigger condition is not true, GoldMine pauses a sequential event until the trigger becomes true.

**Preemptive** Like sequential events, preemptive events are processed in sequence number order. However, *all* preemptive events are processed before *any* sequential events are processed. Preemptive events are generally used to test for specific conditions each time a track is processed. For example, a preemptive event can be used to test if a prospect has purchased, and if so, remove the prospect from the current track. Preemptive events must be numbered from 1 to 99.

GoldMine processes all preemptive events even if some triggers are not true.

**Sequence** Sequence number of the track event. All track events are processed in order of their sequence number. Sequential events must be numbered between 100 and 999. Preemptive events must be numbered from 1 to 99.

### ***Defining a Trigger***

Each Automated Process event performs a specific action based on a trigger. When tracks are processed, GoldMine evaluates the trigger of the current event for each track attached to a contact record. When triggered, the event's action is performed, and processing continues with the next event. You can display a list of conditions by clicking on the arrow to the right of **Trigger on**. You can select one of the following trigger conditions for GoldMine's Automated Processes:

**Elapsed Days** Specifies a number of days (in the **Elapsed Days** field) that must pass before the action associated with an event can be executed. GoldMine begins counting days as soon as the event immediately prior to the current event is triggered. If an event is the first event of the track, GoldMine begins counting days as soon as the event is attached to a contact record.

**Immediate** Instantly executes the action associated with the event. This allows you to set up a sequence of actions based on a single trigger.

**Detail Record** Specifies that the processing of an event's action cannot be executed until a specified detail record, document link, other contact, or referral has been added to the contact record.

- History Activity** Specifies that the processing of the event's action cannot be executed until a specified history record has been saved for the contact record.
- Scheduled Activity** Specifies that the processing of an event's action cannot be executed until a selected activity type has been scheduled for the contact – see “Triggering on Scheduled Activities” on page 191.
- dBase Condition** Specifies that the event's action can be executed only after a specified dBASE expression is evaluated as true. To access the **Expression Builder** dialog box, from which you can select an existing expression or create an expression, select **Options**. For details about working with the **Expression Builder** dialog box, see “Create a Filter” in *GoldMine Sales and Marketing At-a-Glance*, which describes the similar **Build** tab.
- Disabled** Turns off the trigger condition setting for the selected event.
- Attempt to trigger only once** Available for **Detail Record**, **History Activity**, **Scheduled Activity**, and **dBASE condition**: branches to the next event *whether or not* the current event is triggered. If the current event is triggered, GoldMine executes the corresponding action, then continues to the trigger of the next event. However, if the event is *not* triggered, GoldMine skips the event, and continues to the trigger of the next event.

For example, one AP track might include two events:

- Sends a gift to contacts who make purchases over a specified dollar amount
- Prints a thank-you letter to a contact who makes any purchase

Selecting **Attempt to trigger only once** enables GoldMine to print the thank-you letter for all purchases, regardless of the dollar amount.

**Trigger Filter** Specifies an additional dBASE expression that is evaluated after any other trigger condition. You can use **Trigger Filter** with most of the other trigger conditions. When you select **Trigger Filter**, the event action is performed only when both the trigger condition has been met and the **Trigger Filter** is evaluated as true. Select **Filter** to access the **Expression Builder** dialog box, from which you can select an existing expression or create an expression that is evaluated *after* the primary trigger condition has been met. For details about working with the **Expression Builder** dialog box, see “Create a Filter” in *GoldMine Sales and Marketing At-a-Glance*, which describes the similar **Build** tab.

### **Specifying an Action**

When an event has been triggered, GoldMine executes the action associated with the event. You can display a list of conditions by clicking on the arrow to the right of **Perform Actions**. You can select one of the following actions for GoldMine’s Automated Processes:

**Print Form** Prints or faxes a merge form for the contact when the event is triggered – see “Triggering Form Printout on page 195.

*GoldMine must be running under Windows NT 4.0 to successfully use Automated Processes for printing or faxing with Microsoft Word.*

**E-mail message** Generates and sends an Internet e-mail template to the contact when the event is triggered.

**Print Report** Prints a report when the event is triggered – see “Triggering a Report Printout” on page 196.

**Schedule Activity** Schedules a calendar activity for selected users when the event is triggered.

**Create History** Adds a history record to the contact record when the event is triggered.

**Create Detail** Adds a detail record to the contact record when the event is triggered.

- Add to Group** Adds the contact to the specified group when the event is triggered.
- Update Field** Updates one of the fields in the contact record with the result of a dBASE expression or LOOKUP.INI when the event is triggered.
- Remove Track** Removes the current track from the contact record when the event is triggered.
- Add a New Track** Attaches a new track to the contact record when the event is triggered – see “Attaching Tracks to a Contact Record” on page 172.
- Branch to Event** Directs GoldMine to proceed to a specified event. Selecting this option allows the flexibility of “rerouting” the track. For example, you could direct GoldMine to proceed to event 150, skipping over any unprocessed sequential events prior to 150.
- Run Application** Starts an application when the event is triggered.

## Triggering on Scheduled Activities

To specify that an Automated Processes event's action be performed when a specified type of calendar record has been created for the contact, select **Scheduled Activity** from the **Trigger on** section in the **Event Properties** dialog box.

To define settings for the **Scheduled Activity** trigger, select **Options**.

*Schedule Trigger dialog box*



The **Schedule Trigger** dialog box contains the following options:

- Activity Type** Six options allow you to specify the type of scheduled activity that will trigger the event's action. Select **Call Back**, **E-mail Message**, **Next Action**, **Appointment**, **Forecast Sale**, or **Other**.
- +/- Days** Specifies, in days, how recently the Scheduled Activity must have been scheduled on the calendar. For example, if you specify +3 for **+/- Days**, GoldMine will trigger the event only if a calendar activity is scheduled for completion within the next three days. Similarly, specifying -3 will cause the event to be triggered only if a calendar activity should have been completed within the last three days. The default value, zero, specifies that an activity on any date will trigger the event.
- Activity** Specifies a particular activity code that must appear on the scheduled activity to trigger the event.

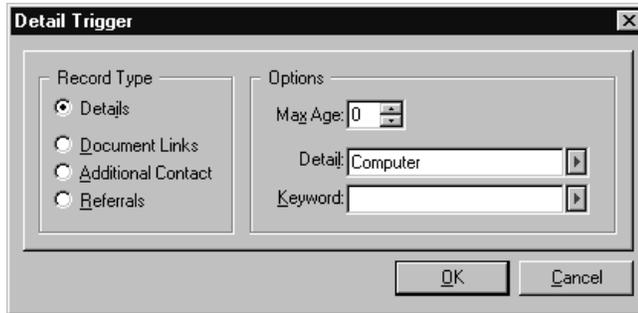
**User** Specifies that the activities must have been scheduled by the selected user to trigger the event. To select a user, click  to display a drop-down list, from which you can select a name.

**Reference Contains** Specifies a word or phrase that must appear in the **Reference** field of the scheduled activity to trigger the event.

## Triggering on Detail Records

You can select **Detail Record** to perform an Automated Processes event's action when a specified profile, linked document, other contact, or referral record has been created for the contact record. To select this event trigger from the **Event Properties** dialog box, select **Detail Record** in the **Trigger on** section. To define trigger conditions for the profile, select **Options**.

*Detail Trigger dialog box*



The **Detail Trigger** dialog box contains the following options:

**Record Type** Selects one of four types of supplementary records that will trigger the event action. Selecting **Details**, **Document Links**, **Other Contacts**, or **Referrals** will specify which type of profile record triggers the event action.

**Max Age** Specifies, in days, the maximum acceptable age of the record. For example, entering 7 in this field will cause the event to trigger only if a record of the specified type exists for the contact record, and the record was created within the past seven days. The default value, zero, scans records of any age.

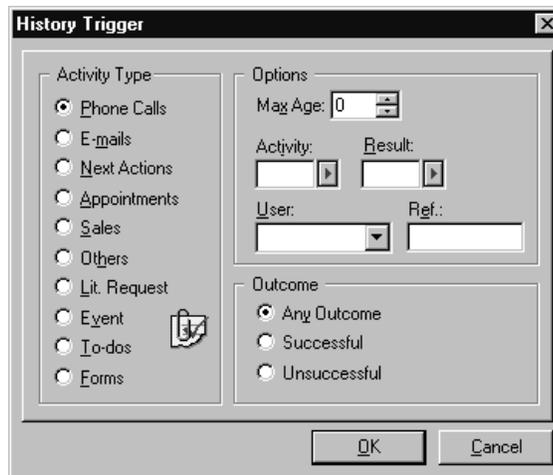
**Detail** Specifies the name of the detail record to trigger the event action. This field is available only when the **Record Type** field has been set to **Details**.

**Keyword** Specifies a word or phrase to be searched for within the **Reference** field of the selected type of supplementary record. If a value is entered in this field, only a record that contains a matching value will trigger the event.

## Triggering on History Records

You can select **History Activity** to perform an Automated Processes event's action when a specified type of history record has been created for the contact. To select this type of event trigger, select **History Activity** from the **Trigger on** section in the **Event Properties** dialog box. To display additional information, select **Options** to display the **History Trigger** dialog box.

*History Trigger dialog box*



The **History Trigger** dialog box contains the following options:

**Activity Type** Eight options allow you to specify the type of history record that will trigger the event's action. Select **Phone Calls**, **E-mails**, **Next Actions**, **Appointments**, **Sales**, **Others**, **Lit. Request**, **Event**, **To-dos**, or **Forms**.

- Max Age** Specifies, in days, how recently the history record must have been created. For example, if you specify 10 for **Max Age**, GoldMine will trigger the event only if a history record of the specified type has been created within ten days of the date of this event being processed. The default value, zero, specifies that history records of any age will trigger the event.
- Activity** Specifies a particular activity code that must appear in the history record to trigger the event.
- Result** Specifies a particular result code that must appear in the history record to trigger the event.
- User** Specifies that the activities must have been completed by the selected user to trigger the event. To select a user, click  to display a drop-down list, from which you can select a name.
- Ref.** Specifies a word or phrase that must appear in the **Reference** field of the history record to trigger the event.
- Outcome** Three buttons allow you to specify whether only successfully completed (**Successful**), unsuccessfully completed (**Unsuccessful**), or (**Any Outcome**) will trigger the event.

## Triggering Form Printout

You can set GoldMine to fax or print a merge form when the event is triggered.



GoldMine must be running under Windows NT 4.0 to successfully use Automated Processes for printing or faxing with Microsoft Word.

Select **Print Form** from the **Perform Action** drop-down list in the **Event Properties** dialog box. To select a form to print or fax, select **Options**. The **Select a Form** dialog box appears.

Select a Form dialog box

Form Description	File Name	User
Blank Letter	blank.rtf	
Fax Cover Sheet	FaxCover.rtf	
Sample Blank Memo	Memo.rtf	
Professional Letter	ProfLtr.dot	
Blank Letter	Blank.rtf	
Blank Letter 1	Blank.dot	
Fax Cover Sheet 1	Faxcover.dot	
Memo	Memo.dot	
Contact Profile	Profile.dot	
Referral Request	RefrrlReq.dot	
Blank Letter (UK)	ukblank.dot	

Printing Schedule

Print immediately  
 Queue for immediate printing  
 Queue for printing in  days

User

Record Owner  
 Assigned User: ASHLEY  
 Attaching User  
 Logged User

Output method

Print  FAX

OK Cancel

To specify an **Assigned User**, select a name from the drop-down list

Highlight the desired form record in the browse window. Select an **Output Method** of *either* **Print** or **FAX**, then select **OK**.

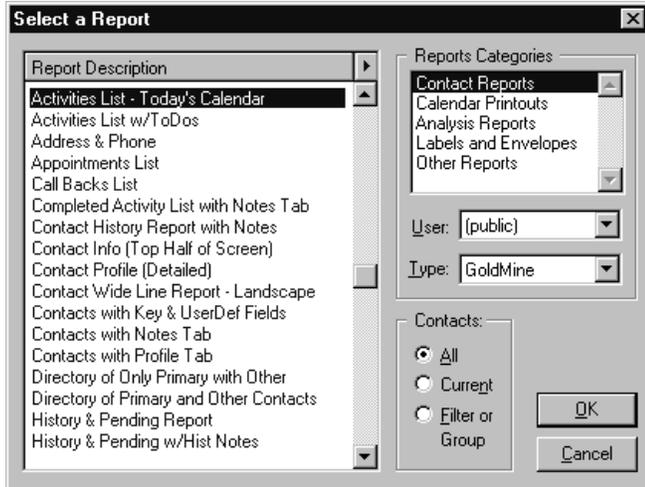
When **Print Form** actions are executed, GoldMine prints or faxes the form using the DDE application that is associated with the selected form. If a link has not been installed in the application associated with the merge form, or GoldMine cannot load the application, an error will occur. The form will not be printed or faxed.

For the latest information on installing DDE links to individual applications, see README.RTF.

## Triggering a Report Printout

Select **Print Report** to print one of GoldMine's reports when the event is triggered. To associate a report printout with an Automated Processes event, select **Print Report** from the **Perform Action** drop-down list in the **Event Properties** dialog box, then select **Options** to specify which report to print.

Select a Report dialog box



To select a report, select the report's owner from the **User** drop-down list, then select a report category, such as **Contact Reports**, **Calendar Printouts**, **Analysis Reports**, etc. Highlight the desired report in the browse window, then select **OK**. GoldMine sends the selected report to the default printer.



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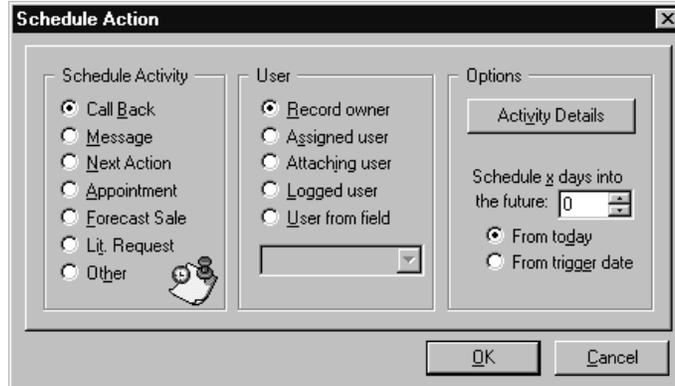
For details on printing GoldMine reports, see "Generating Reports" in the online Help.

---

## Scheduling an Activity by Event Trigger

Select **Schedule Activity** to schedule a **Calendar** activity for a specified GoldMine user when the event is triggered. To specify a **Scheduled Activity** for an Automated Process event, select **Schedule Activity** from the **Perform Action** drop-down list in the **Event Properties** dialog box, then select **Options**.

Schedule Action dialog box



The **Schedule Action** dialog box contains the following options:

**Schedule Activity** Seven options that specify the type of activity to be scheduled when the event is triggered. Select **Call Back**, **Message**, **Next Action**, **Appointment**, **Forecast Sale**, **Lit. Request**, or **Other**.

**User** Select one of the following five options to designate the user for whom the activity will be scheduled:

- **Record owner:** schedules the activity for the user who is the record owner of the contact record. The record owner of the contact record can be viewed or changed by selecting **Edit|Record Ownership** when the desired contact record is active.
- **Assigned user:** schedules the activity for the **Primary User** specified in the **Schedule** tab of the **Schedule** window – to view this entry, select **Activity Details**.



---

If **Record owner** is selected, and a contact record to which the track is attached has no record owner, then **Assigned user** is used. If **Assigned User** is blank, GoldMine selects the user who attached the tracks.

---

- **Attaching user:** schedules the activity for the user who attached the track to the contact record.
- **Logged user:** schedules the activity for the currently logged user (the user who executed the track).
- **User from field** schedules the activity for the user that corresponds to the GoldMine field selected from the drop-down list located below the option.

**Activity Details** Displays the **Schedule** window, from which you can define a scheduled activity.




---

For details on entering information to schedule an activity, see “Scheduling an Activity” in the online Help.

---

**Schedule x days into the future**

Specifies the number of days in the future that GoldMine will schedule the activity.

The period can be based on one of the following:

- **From today:** starts counting days from the current date.
- **From trigger date:** starts counting days after the event is triggered. For example, if the entry is 5, and the event triggers on August 5<sup>th</sup>, the activity will be scheduled for August 10<sup>th</sup>.

When an event with a **Schedule Activity** action is triggered, GoldMine creates a **Calendar** activity of the specified type for the selected user. The **Reference** field of the scheduled activity contains the text from the event’s **Reference**.

## Creating a History Record by Event Trigger

Select **Create History** the **Perform Action** drop-down list in the **Event Properties** dialog box to create a history record when the event is triggered. To define the **Create History** action for an Automated Processes event, select **Options**.

*History Action dialog box*



The **History Action** dialog box contains the following options:

**Activity Type** Eight options that specify the type of history record to be created when the event is triggered. Select **Phone Calls**, **Messages**, **Next Actions**, **Appointments**, **Sales**, **Others**, **Forms**, or **To-dos**.

**User** Five options that specify the user for whom the history record will be created.

- **Record owner** creates the history record for the user who is the record owner of the contact record. The record owner of the contact record can be viewed or changed by selecting **Edit|Record Ownership** when the desired contact record is active.
- **Assigned user** creates the history record for the user specified in the **User** field of the activity record. To confirm the identity of the user, select **Activity Details**. The **Complete** dialog box will appear. The name of the assigned user appears in the **User** field.



---

If **Record Owner** is selected, and a contact record to which the track is attached has no record owner, then **Assigned user** is used. If **Assigned User** is blank, then the user who attached the track is used.

---

- **Attaching user** creates the history record for the user who attached the track to the contact record.
- **Logged user** creates the history record for the currently logged user (the user who performed the track processing).
- **User from field** creates the history record for the user that corresponds to the field selected from the drop-down list located below the option.

**Activity Details** Displays the **Complete** dialog box, from which you can enter the values to complete the activity when triggered.



---

For information on entering information to complete an activity, see “Completing Activities” in the online Help.

---

When an Automated Processes event with a **Create History** action is triggered, GoldMine will create a history record of the specified type for the selected user. The history record will be attached to the contact record. The **Reference** field of the history record will contain the text from the event’s **Reference**.

## Updating a Field Value

You can select **Update Field** from the **Perform Action** drop-down list to replace the value in a selected field in the contact record with the result of either a dBASE expression, or a lookup replacement value. To set up the **Update Field** action for an Automated Processes event, select **Options**.

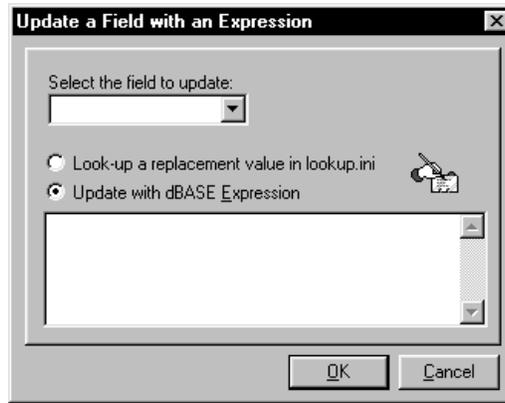


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For an expression to work properly, you *must* enclose the statement in brackets {}.

---

**Update a Field  
with an  
Expression  
dialog box**



The **Update a Field with an Expression** dialog box contains the following options:

**Select the field  
to update**

Specifies the field in the contact record to be updated. Select a field from the drop-down list. In the **Update with Expression** field, enter a dBASE expression with which to replace the field.

**Look-up a  
replacement  
value in  
lookup.ini**

Updates the selected field as specified in the LOOKUP.INI file – see “Defining Field Updates as an Automated Process” on page 324.

**Update with  
dBASE  
Expression**

GoldMine evaluates the dBASE expression, and replace the selected field in the contact record with the result.

When done, select **OK**.

## Removing a Track

Select **Remove Track** from the **Perform Action** drop-down list in the **Event Properties** dialog box to remove the current track from the contact record. When a track is removed, the track events are no longer processed for the contact record.

When an Automated Processes event with a **Remove Track** action is triggered, GoldMine removes the track from the contact record. GoldMine automatically removes a track when the last event is processed.



Use a **Preemptive** event with a **Remove Track** action to test if a desired outcome has occurred before a track is completed. For example, if the Automated Processes track is designed to result in a sale, a **Preemptive** event should be used to determine if a sale has already been made, and prevent the possibility of “selling past the close.”

## Attaching a New Track

You can **Add a New Track** when the status of a contact record changes, so that a new track is attached based on the new status. For example, if a prospect purchases a product, a **Customer Survey** track can be attached to the contact record.

Select **Add a New Track** from the **Perform Action** drop-down list in the **Event Properties** dialog to attach a new track to the active contact record. To define the **Add a New Track** action, select **Options**.

*Attach an Automated Process dialog box*



Highlight the track that you want to select.

When an Automated Processes event with an **Add a New Track** action is triggered, GoldMine attaches the selected track to the contact record.

To set GoldMine to immediately execute the track, select **Process track immediately**.

## ***Branching to an Event***

You use an event to trigger another event.

Select **Branch to Event** from the **Perform Action** drop-down list in the **Event Properties** dialog box. To select an event, select **Options**. The **Branch to Event** dialog box appears.

Click anywhere on the **Branch to Event** drop-down list to display a list of events. Select an event, then select **OK**.

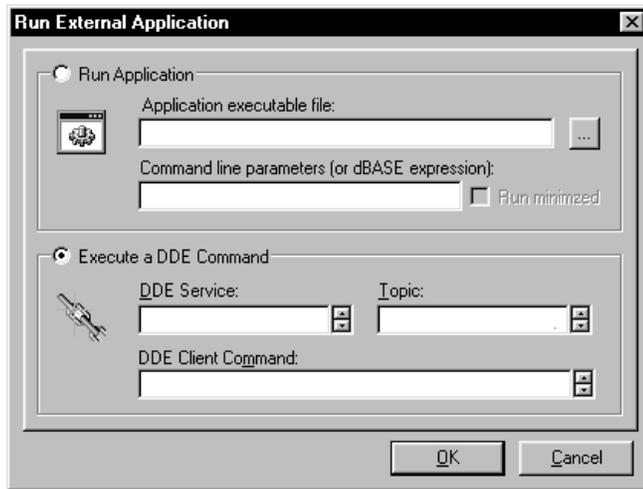
## ***Running an Application by Event Trigger***

Select **Run Application** from the **Perform Action** drop-down list to *either*:

- Start an application
- or*
- Perform a Dynamic Database Exchange (DDE) command when the event is triggered.

For example, using the **Run Application** action, each time a contact record is created, you can set up GoldMine to start a custom program that copies data to an accounting application. To set up the **Run Application** action for an Automated Processes event, select **Options**.

**Run External  
Application  
dialog box**



The **Run External Application** dialog box contains the following options:

**Run Application** Defines the application, optional parameters, and mode in which you want GoldMine to launch the application with the following settings:

- **Application executable file:** Path and file name of the application to be run when an activity occurs. For example, to launch Notepad, you can enter `C:\WINDOWS\NOTEPAD.EXE`. To search through your system, in the field, *either* type the location, *or* click `...`. The **Open** dialog box appears, from which you can select a directory and application.
- **Command line parameters (or dBASE expression):** Adds optional parameters to the command to specify an additional action when the application is launched. For example, to launch Notepad *and* open a specific document, you can enter the example shown above in the **Application executable file** field; in the **Command line parameters (or dBASE expression)** field, enter `C:\GOLDMINE\LETTER.TXT`. You can also enter a dBASE expression to specify a command line parameter specific to the record being processed.
- **Run minimized:** Starts the application in the background, and places a button for the application in the Windows Taskbar.

**Execute a DDE Command** Contains the following options to define a DDE command that GoldMine can send as a client to another application:

- **DDE Service**
- **Topic**
- **DDE Client Command**

Each application uses a unique format for responding to DDE requests. For a discussion of DDE components, and examples related to Word for Windows, see “Dynamic Data Exchange (DDE)” in the online Help.

When done, select **OK**. GoldMine will launch the specified application or DDE command when the event is triggered.



# 6

## Managing Multiple Databases

GoldMine stores contact records in a *contact set*. When GoldMine is installed, a contact set called the **Common** contact set is created. Usually, all contact records are stored in this database. If desired, GoldMine allows you to create and maintain more than one contact set, and store information in one or more additional databases.



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Although this manual refers to a contact set or a contact database, GoldMine's databases are actually a collection of files. For simplicity, the data and index files that comprise a single contact database will be referred to as a *contact set*.

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You might want to create additional contact sets for a number of reasons. For example, if you purchase a mailing list, you should enter all of this data into a second GoldMine contact set. After a mailing is generated from this contact set, you can selectively transfer contact records over to your main contact set, as contacts respond to the mailing. By keeping unqualified contacts in a second directory, your main contact directory remains compact and free of uninterested contacts.

Although contact records can be maintained in multiple contact sets, or databases, GoldMine still schedules and completes activities from a single calendar. Regardless of which contact set is active, your scheduled activities, as well as other calendar functions, remain intact.

When a calendar activity is completed, the history record is always added to the history file in the active contact database. If the calendar activity was originally linked to a contact record in another database, GoldMine will warn you that the wrong database is active. If you select to complete the activity anyway, the completed activity becomes an unlinked history record in the active database's history file. In addition, the contact set from which the activity was originally scheduled will not be updated.



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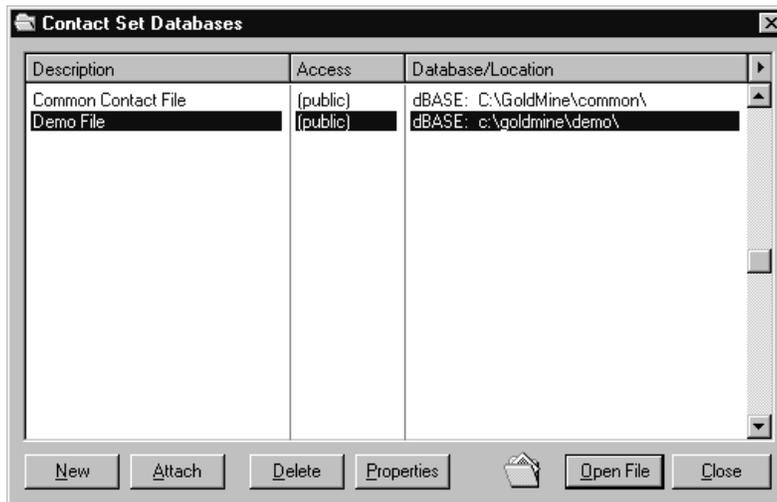
This chapter contains information about running GoldMine with a standard dBASE license. If you have installed GoldMine FrontOffice 2000, see the *GoldMine FrontOffice 2000 Administrator's Guide*.

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## Working with a Contact Database

To view, add, edit, or delete different contact databases, select **File|Open Database**.

**Contact Set Databases dialog box**



The **Contact Set Databases** dialog box contains the following information and options:

**File Description** Lists the descriptive names of all the contact databases that have been defined.

**Access** Displays the owner of each contact set. Each contact database maintained with GoldMine has an owner. The owner can be an individual user, a user group, or **(public)**. Only the owner of the contact set, or a member of the group that owns the contact database, can open the contact database.

The owner of a contact set defaults to **(public)**, which allows all GoldMine users to access the database. When the **Access** field is set to a user group name, GoldMine considers all members of the user group to be owners of the contact database.

Users with Master Rights can access all contact databases, regardless of their owner.

**Database/Location** *dBASE*: displays the drive and path of the directory that contains the contact database files and indexes.

*SQL*: displays the *Borland Database Engine (BDE)* alias that GoldMine uses to connect to the SQL servers.

**New** Allows you to create a contact database. For details, see “Creating a Database File” on page 213.

**Properties** Allows you to edit the **File Description**, **Access**, and **Database/Location** for the selected contact set. For details, see “Editing Properties for a Database File” on page 211.

**Delete** Deletes the highlighted contact set record. Note that while the linked record is deleted, the actual data files are *not* deleted. You cannot delete the currently open database.

**Open File** Opens the highlighted contact set.

**Close** Closes the **Contact Files Listing** dialog box.

### **Contact Set Databases Local Menu**

To display the Contact Set Databases local menu, right-click inside the browse window. The Contact Set Databases local menu contains the following commands:

**Open** Accesses the selected contact set.

**New Database** Displays the **Database Wizard**, from which you can create a contact set – see “Creating a Database File” on page 213.

**Attach Database** Allows you to link your GoldMine system to an existing contact set that does not appear in the **Contact Set Databases** dialog box. That is, you can link to contact sets created by another GoldMine system, or restored from a backup. For example, if you are connecting your notebook computer to a GoldMine network system, you can temporarily use the contact sets on the server and transfer contacts to your notebook system. Conversely, you can also map to contact sets on your notebook if you wish to transfer contacts from the notebook to the file server.

Use this option to convert older GoldMine data that is incompatible with GoldMine Sales and Marketing.

Select this option to display the **Contact Set Profile** dialog box, from which you can copy an existing contact set to an existing database – see “Editing Properties for a Database File” on page 211.

To open the contact set, *either* select **Open** from the local menu, *or* select **Open File** from the **Contact Set Databases** dialog box.

**Maintain Database** Accesses the **Maintenance Wizard**, from which you can index and/or rebuild a contact set.

**Delete** Removes the selected contact set from the **Contact Set Databases** dialog box. This option does *not* remove a physical file.

You cannot delete the currently open database.

**Properties** Displays the **Contact Set Profile** dialog box, from which you can modify settings for an existing contact set – see “Editing Properties for a Database File” on the following page.

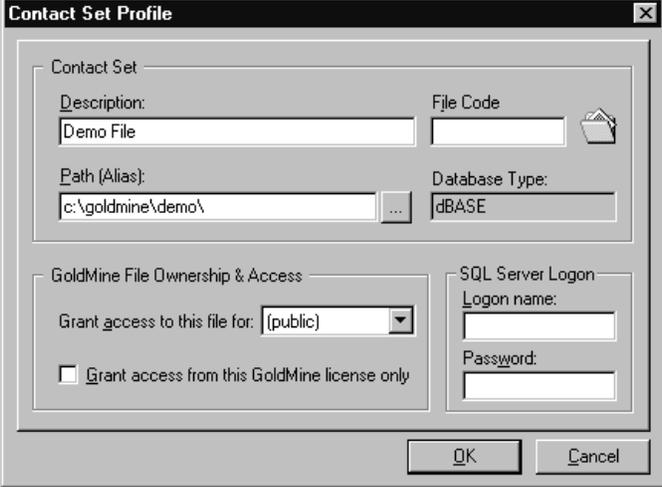
## Opening a Contact Database

To open a different contact set from the **Contact Files** dialog box, *either* highlight the desired file, then select **Open Database**, *or* double-click on the desired file.

## Editing Properties for a Database File

To change the settings for a contact set, select **Properties** from the **Contact Set Databases** dialog box.

**Contact Set Profile**  
Profile  
dialog box



The **Contact Set Profile** dialog box contains the following options:

- Description** Descriptive name for the database. Enter a name that describes the contact set, such as Comdex 99 Trade Show, or New Businesses Downtown.
- File Code** Specifies a unique code that to identify the contact set among multiple files when GoldMine performs remote synchronization.
- Path/Alias** Drive and path of the directory to hold the contact sets and indexes.  
To search through directories on your system, in the field, *either* type the location, *or* click **...**. The **Open** dialog box appears, from which you can select a directory.

**Grant access to this file for** Displays the owner of the contact set. Each contact database maintained with GoldMine has an owner, which can be an individual user, a user group, or **(public)**. Only the owner of the contact set, or a member of the group that owns the contact database, can open the contact database.

By default, the owner of a contact set is **(public)**, which allows all GoldMine users to access the database. When the **Access** field is set to a user group name, GoldMine considers all members of the user group to be owners of the contact database.

Users with Master Rights can access all contact databases, regardless of their owner.

**Logon name** Login entry required to open the contact set. (SQL only)

**Password** Password entry to open the contact set. (SQL only)

**Grant access from this GoldMine system only** Allows only the currently running GoldMine to open the database.

Select **OK** to enter the changes, and close the **Contact Set Profile** dialog box. You must open the contact set from the **Contact Set Databases** dialog box *before* you can start entering data. Once you select a contact set, all GoldMine functions and commands act on the active contact set. Reports, importing and exporting, indexing and packing options affect, or are affected by, the currently selected contact database.

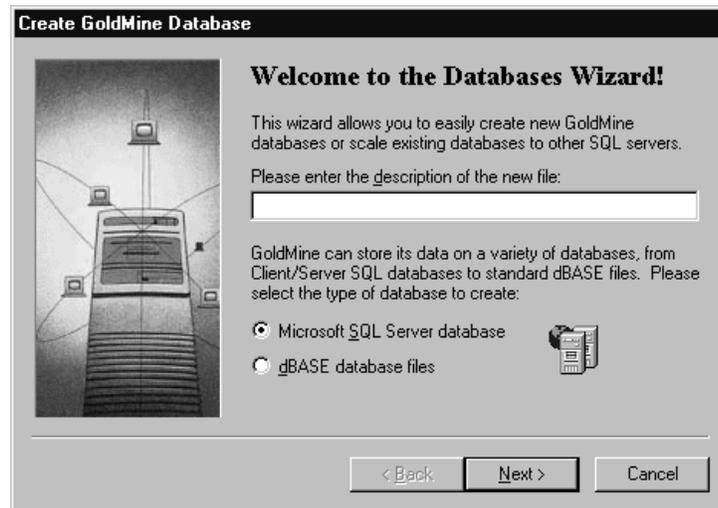
To create a database, work with GoldMine's **Database Wizard**. Continue with "Creating a Database File."

## Creating a Database File

Using **GoldMine's Database Wizard**, you can create a blank database structure to store data in either standard dBASE tables or on an MS SQL server. Once created, you can later copy data into the database. For details on working with MS SQL servers, see the *GoldMine FrontOffice 2000 Administrator's Guide*.

To create a database, select *either* **New** from the **Contact Files** dialog box, *or*, from the Main Menu, select **Tools|Create Databases**. The **Create GoldMine Database Wizard** appears.

### Create GoldMine Database Wizard



The first dialog box of the **Create GoldMine Database Wizard** contains the following options:

#### Please enter the description of the new file

Type a descriptive title for the contact set. When creating a database or rehosting a contact set, GoldMine uses this title when listing the file in the **Contact Files** dialog box. However, when you rehost other GoldMine files, such as the **Calendar**, **InfoCenter**, etc., you can leave this field blank. GoldMine does *not* list these files in the **Contact Files** dialog box.

To specify the kind of contact set that you will create, select *either*:

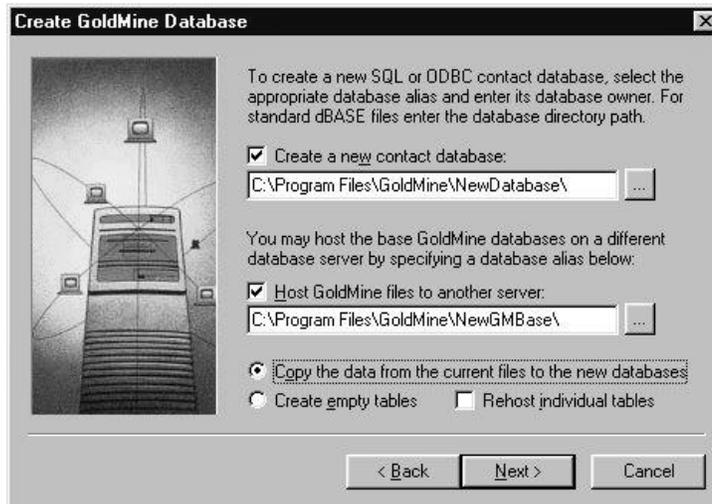
- **Microsoft SQL Server database**
- **dBASE database files**

When done, select **Next>**. Continue with "Setting Database Options."

## Setting Database Options

When you advance after selecting options on the first dialog box of the **Create GoldMine Database** wizard, the second dialog box appears.

### Create GoldMine Database wizard



To create a contact set, select **Create a new contact database**. In the field below the option label, *either* type the path to the database directory, *or* click  to search through directories on your system. The **Open** dialog box appears, from which you can select a directory.

To specify whether or not you want to copy data from the open contact set into the new contact set, select from the following options:

**Copy the data from the current files to the new databases** Copies data from the currently open contact database file to the newly created database. If necessary, GoldMine converts the data to the format appropriate for the database type specified on the first dialog box of the **Database Wizard**.

**Create empty tables** Creates a database structure that can receive data at a later time. *Never* select this option if you select **Host GoldMine files to another server**.

**Rehost individual tables**

Displays the **Rehost Selected Tables** dialog box, from which you can select one or more tables to copy.

Check this option only if you want to specify the tables to be copied. For example, you might want to copy the table(s) needed to complete rehosting if the process was interrupted.

The individual tables will *either* be empty, *or* contain data from the currently open contact file or root GoldMine data, depending whether you selected **Copy the data from the current files to the new databases** *or* **Create empty tables**.

When done, select **Next>**.

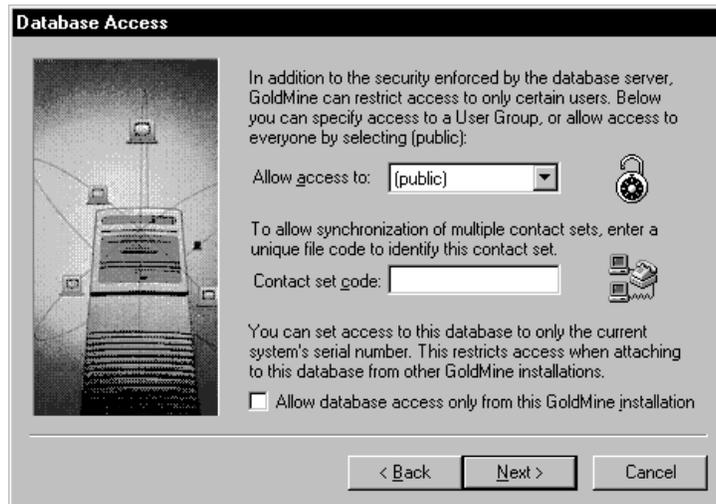
If you selected *either* **Copy the data from the current files to the new databases** *or* **Create empty tables**, the **Database Access** dialog box appears. Continue with "Setting Access Options."

If you selected **Copy individual tables**, the **Rehost Selected Tables** dialog box appears. Go to "Selecting Individual Tables to Rehost" on page 217.

**Setting Access Options**

When you advance after selecting options on the second dialog box of the **Create GoldMine Database Wizard**, the **Database Access** dialog box appears.

**Database Access dialog box**



The **Database Access** dialog box contains the following options:

**Allow access to** Grants access to only the selected user or user group. To select a user or user group, select a name from the drop-down list.

To grant access to all users, accept the default entry of **(public)**.

**Contact set code** Unique value given to each *database* that GoldMine uses to associate transfer data with the correct database(s). Using a contact set code allows remote synchronization of other databases, regardless of the name given locally to the database.

For example, an east coast branch office and a west coast branch office might have virtually the same contact set. Each branch office wants to synchronize data from their local contact set with the other office.

The east coast office named the contact set *Industrial*, while the west coast office named the same contact set *Manufacturing*. If each office assigns the same **Contact set code** value to the local copy of the database, the offices can synchronize data.

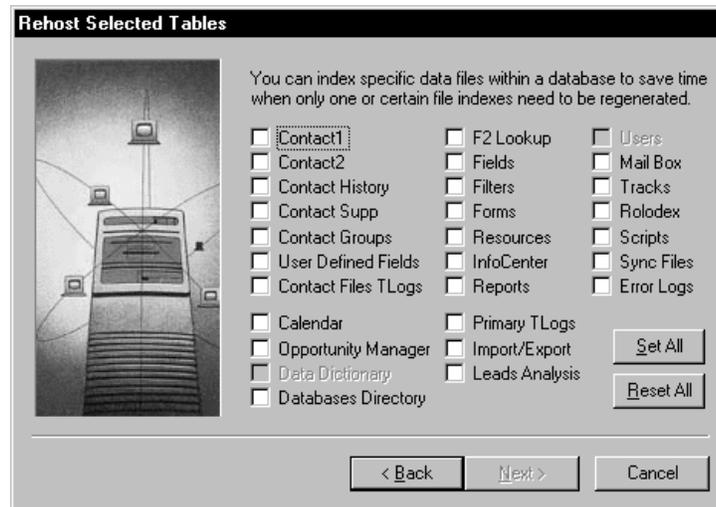
**Allow database access only from this GoldMine installation** Allows only the currently running GoldMine (as determined by serial number) to log into the database. A GoldMine system with a different serial number cannot log into the database.

When done defining access rights to the database, select **Next>**. Go to "Starting to Create Database Files" on page 218

## Selecting Individual Tables to Rehost

When you advance after selecting **Copy individual tables** from the second dialog box of the **Create GoldMine Database Wizard**, the **Rehost Selected Tables** dialog box appears.

*Rehost Selected Tables dialog box*



Place a check in the box corresponding to each data file that you want to select, or, to select all files, select **Set All**. To remove all selections, select **Reset All**.

Selecting individual tables for rehosting is useful when you want to:

- Restore a table from a dBASE backup
- Transfer a table to another GoldMine system
- Restart *from the point of failure* after a failed attempt to rehost

When done, select **Next>**. Continue with “Starting to Create Database Files.”

### ***Starting to Create Database Files***

Once you have finished defining options, the **Creating Database Files** dialog box appears.

When ready to start the process, select **Finish**. If you are copying records as part of the process, creating a contact set can be a relatively time-consuming process, depending on the number of records being copied. To stop the process at any time, select **Cancel**.

GoldMine displays the **Creating GoldMine Database Files** status window to provide status information during the creation of the contact set.

Once GoldMine has finished creating the contact set, the **Creating Databases Files** status window closes.

# Maintaining GoldMine

GoldMine provides a set of data management utilities designed to improve the performance of your GoldMine system, such as regenerating indexes, and making global changes to your data. Many of these features should be used only by the network administrator or system manager. *If not used correctly, these operations can cause data loss.*



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There are certain operations that allow only one user to access a data file at a time. These operations include indexing, packing and rebuilding of data files. Before these operations can execute, GoldMine ensures that no other user is accessing the same data. Once the operation is in progress, GoldMine prevents any other user from accessing the data being modified.

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## ***Indexing and Rebuilding Files***

GoldMine stores information in two types of files: *data files/tables* and *indexes*. Data tables contain the information that is displayed for a contact record, the calendar, or any other part of GoldMine. Indexes do not actually store contact or calendar information; instead, they store special “pointer values” that allow GoldMine to quickly locate information in the data tables, or to present the information in an alternate sequence as required when using a command from the **L**ookup menu.

Occasionally, indexes can be lost or become corrupt, causing any of the following symptoms:

- Error messages indicating that an index does not exist.
- Contact records that you know have been entered in GoldMine cannot be located.
- Calendar activities do not appear in the history file when completed.
- Lower portion of the contact information does not appear in a contact record, or the lower half of the contact screen contains another record's contact information.
- Additional contacts, profiles, or referrals are missing from a contact record, or the contact record contains supplementary records that do not belong to the record.
- You cannot log into GoldMine with a valid username and password.
- Calendar or history records that appear in the browse window are not in date sequence.

To prevent data loss when an index becomes corrupt, GoldMine indexes should be regenerated immediately. **GoldMine's Maintenance Wizard** guides you through the procedure.



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In most cases, if you suspect an index to be corrupt, or an index-related error message is displayed, you should inform other network users to exit GoldMine. GoldMine requires all network users to log out before the databases can be indexed. *Most importantly, the other users can experience data loss if they continue to work with GoldMine without first reindexing the files.*

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GoldMine Sales and Marketing databases hosted on an SQL server require *no* rebuilding *unless* you are creating user-defined fields. *When you rebuild, you must reset the privileges on the rebuilt tables because all permissions are lost during the rebuild process.* For details on granting privileges on tables for your SQL login(s), see "Setting Access Options" in the *GoldMine FrontOffice 2000 Administrator's Guide*.

If your data is hosted on an SQL server, you can perform one of the alternate procedures to rebuilding a table with **GoldMine's Maintenance Wizard** — see "Using Alternate Methods to Rebuilding Tables" on page 229.

To regenerate index files using **GoldMine's Maintenance Wizard**:

From the Main Menu, select **File|Maintain Databases**.

**GoldMine's  
Maintenance  
Wizard**



Depending on the size of your database, indexing the entire database can be time-consuming. Selecting specific tables to index reduces the total amount of processing time. **GoldMine's Maintenance Wizard** contains the following file options:

**Current Contact Files** Indexes and rebuilds only the tables in the currently open contact database.

**Individual Files** Specifies which tables in the GoldMine directory and/or in the currently open database that GoldMine will index and/or rebuild.

**All Database Files** Indexes and rebuilds all tables in the currently open contact database, and the tables in the GoldMine system directory.

**Automatic Maintenance** Specifies that GoldMine automatically performs indexing and rebuilding as specified by selections made in the Wizard.

When done, select **Next>**.

If you select **Current Contact Files**, the **Rebuild the Database** dialog box appears. Continue with “Packing and Rebuilding the Database” on page 225.

If you select **Individual Files**, the **Maintain Selected Files** dialog box appears. Continue with “Selecting Files to Maintain.”

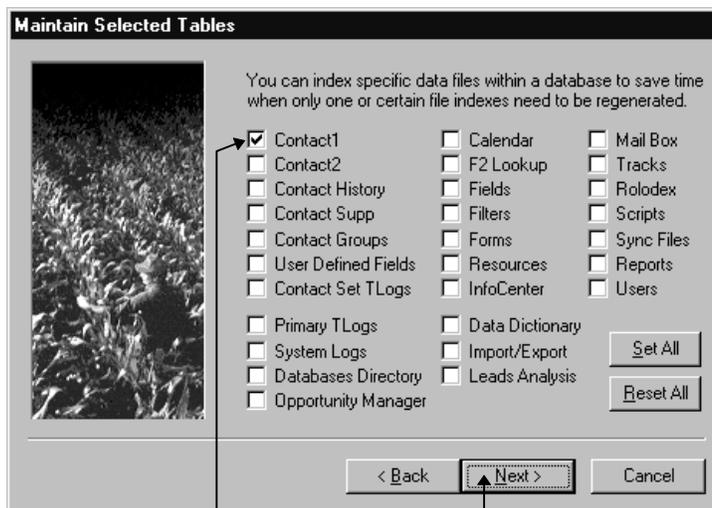
If you select **All Database Files**, the **Index All Database Files** dialog box appears. Continue with “Maintaining All Database Files” on page 223.

If you select **Automated Maintenance**, the **Automated Maintenance** dialog box appears. Continue with “Setting up Automatic Maintenance” on page 224.

### Selecting Files to Maintain

Once you advance after selecting **Individual Files**, the **Maintain Selected Files** dialog box appears.

**Maintain Selected Files dialog box**



You must select at least one data file type to continue.

The **Maintain Selected Files** dialog box contains options for every file type in the contact database. Place a check in each box that corresponds to the file type(s) that you want to index, such as **Contact1**. To select all listed files, select **Set All**. To remove all checks from selected file types, select **Reset All**. You must select *at least* one file type to select **Next>**.

When done, select **Next>**. The **Rebuild, Sort and Verify Database Files** dialog box appears. Continue with “Packing and Rebuilding the Database” on page 225.

## Maintaining All Database Files

Once you advance after selecting **All Database Files**, the **Maintain All Database Files** dialog box appears.

### Maintain All Database Files dialog box



The **Maintain All Database Files** dialog box contains the following options:

#### **Files in GoldMine Directory**

Selects *all* files in the GoldMine directory for indexing.

#### **Current Contact Files**

Selects only the currently open database for indexing.

#### **All Contact Files**

Selects *all* GoldMine contact databases for indexing.

#### **Convert ALL databases to the new RECID format**

*When you first index after installing GoldMine Sales and Marketing, this option appears so that you can convert record ID (RecID) field data to a format that is compatible with other systems. If you do not convert your databases, GoldMine cannot synchronize properly with other systems that run GoldMine using the new RecID format and cannot be rehosted to an SQL data source.*

Once GoldMine converts your databases, this option will not appear again.

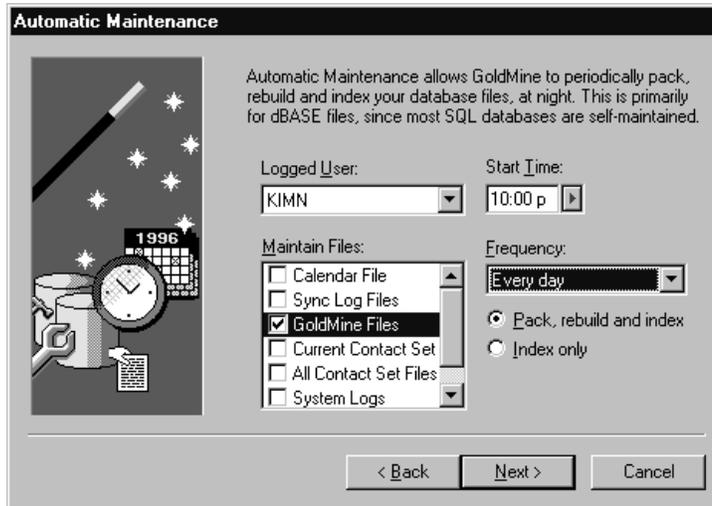
You must select at least one index option to continue.

When done, select **Next>**. The **Rebuild, Sort and Verify Database Files** dialog box appears. Continue with "Packing and Rebuilding the Database" on page 225.

### Setting up Automatic Maintenance

Once you advance after selecting **Automatic Maintenance**, the **Automatic Maintenance** dialog box appears. By specifying criteria from options in this dialog box, you can set up GoldMine to automatically perform indexing and/or rebuilding.

**Automatic Maintenance dialog box**



The **Automatic Maintenance** dialog box contains the following options:

**Logged User** Designates the system administrator, or other user with Master Rights, responsible for the automatic indexing.

**Start Time** Time that GoldMine will automatically start indexing the specified files. You can *either* type in a time (include am or pm), *or* press **F2** to display the graphical clock, from which you can set the time.

Because GoldMine forces all network users to log out of GoldMine during indexing and packing, you will want to index after regular business hours.



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For details about setting time with the graphical clock, see “Setting Time with the Graphical Clock” in the online Help.

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The **Logged User** must be logged into GoldMine at the specified start time/day for the Automated Process to run.

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**Maintain Files** Selects one or more of the following file types for GoldMine to automatically index and/or rebuild:

<b>Calendar File</b>	<b>Sync Log Files</b>	<b>All Contact Set Files</b>
<b>GoldMine Files</b>	<b>Current Contact Files</b>	<b>System Logs</b>



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To best maintain dBase files, pack the **Calendar Files** and **Sync Log Files** more often than the other files; on a busy network, you should pack these files once each week.

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**Frequency** Regularity with which GoldMine will index and/or pack the file(s). You can select from a range of very frequently (**Every day**), infrequently (**Once a month**), to **Off**.

**Pack, rebuild and index** Sets GoldMine to both index and pack the selected files.

**Index only** Sets GoldMine to only index the selected files.

When done, select **Save**. The **Automated Maintenance** dialog box closes. GoldMine will index and/or pack the selected file(s) at the specified time on the dates that fall according to the selected frequency.

## Packing and Rebuilding the Database

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*To prevent data loss, always back up files on your system before rebuilding the database.* Consult your SQL server's documentation for information on backing up SQL databases.

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When records are deleted from a dBASE contact database, they are not physically removed from the dBASE database. Instead, GoldMine marks the records as deleted, then automatically skips them in subsequent operations. As the number of deleted records increases, "dead space" increases between active records. When the database contains a substantial percentage (20% or more) of deleted records, the amount of time necessary to find a record, or move among records, increases.

*Packing* is the process of actually deleting records that were marked for deletion. This process is only necessary for a dBase database. Periodically packing the GoldMine database files removes the "dead space" between records.

GoldMine Sales and Marketing databases hosted on an SQL server require no packing and rebuilding unless you are creating user-defined fields. For an SQL database, you can even perform an alternate procedure to rebuilding a table when adding user-defined fields—see "Manually Adding User-defined Field Columns to CONTACT2" on page 229. When you do rebuild, you must reset the privileges on the rebuilt tables because all permissions are lost during the rebuild process.



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For details on granting privileges on tables for your SQL login(s), see "Setting Access Options" in the *GoldMine FrontOffice 2000 Administrator's Guide*.

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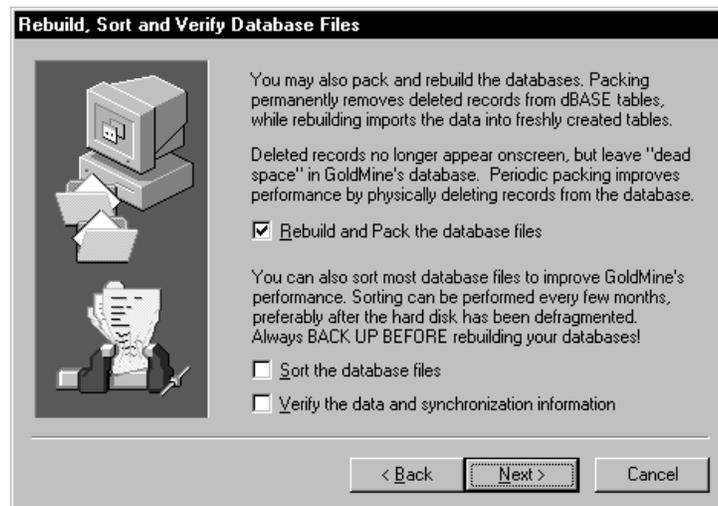


In the unlikely event that your data files become corrupt, rebuilding the database might save the uncorrupted portions of the file, since packing creates a new database and appends the undeleted records from the old database.

*Rebuilding* creates a new file structure (or table), and copies data, record-by-record, from the old files/tables. If your system fails in the middle of rebuilding, you can lose data. Data loss can also occur to a corrupted file. *Always back up files on your system before rebuilding the database to prevent data loss.* For details on backing up data, see “Backing up Data” on page 262, or refer to your SQL server’s documentation.

In a network environment, no one can access the files being packed. If only the contact sets are being packed, users on the network can access other contact sets. If both the contact and system files are being packed, all users must log out of GoldMine until the packing is complete. If a user attempts to access data while GoldMine is packing, GoldMine displays a warning message indicating that the database is in use.

**Rebuild, Sort  
and Verify  
Database Files  
dialog box**



Regardless of which file-indexing option you selected from the initial **Maintenance Wizard** screen, you can select the pack and rebuild option.

The **Rebuild, Sort and Verify Database Files** dialog box contains the following options:

- |  |  |
|--|--|
| <b>Rebuild and Pack the database files</b>             | <p>Creates fresh data files/tables, then imports the records that remain after packing into these new data files/tables.</p> <p>GoldMine packs the same range of files/tables selected for indexing from the initial <b>Maintenance Wizard</b> screen. For example, if you selected <b>Current Contact Files</b>, GoldMine first indexes the records from the currently open database, then packs and rebuilds only the currently open database.</p> |
| <b>Sort the database files</b>                         | <p>Orders the records in the files/tables by the most-used indexes.</p>  |
| <b>Verify the data and synchronization information</b> | <p>Checks to ensure that:</p> <ul style="list-style-type: none"><li>• Data is readable.</li><li>• All sync fields in the synchronization records of the database file(s) are populated, and no unique fields are duplicated.</li></ul>   |

When done, select **Next>**. Continue with “Starting to Rebuild the Database.”

### **Starting to Rebuild the Database**

A finish screen with a checkered flag is the last screen to appear before indexing and rebuilding starts. Since GoldMine needs exclusive use of the database when performing this operation, all network users must *either* exit GoldMine, *or* be forced to log out of GoldMine before this process can start. To ensure exclusive use, select **Force all users to log out of GoldMine within x minutes**. By default, GoldMine allows two minutes for logout. You can type another number in the field to designate a different number of minutes.

When you are ready to start processing, select **Finish**. Depending on the number of file types selected, indexing can be a time-consuming process. Large databases can require an hour or more to index. Similarly, packing and rebuilding can also require a significant amount of time to process. During the index/pack process, **GoldMine's Maintenance Wizard** status window appears to provide information about the ongoing status of the process. Once the index/rebuild process is complete, GoldMine automatically logs in those users who were forced out to perform the maintenance, provided they have not closed the **Down for Maintenance** screen.

## **Using Alternate Methods to Rebuilding Tables**

If your data is hosted on an SQL server, there are two alternate methods that you can use instead of rebuilding a table with **GoldMine's Maintenance Wizard**. You can *either*:

- Add user-defined field columns to the CONTACT2 table
- or*
- Manually add and replace indexes

*Only users experienced with their database server should attempt either of the following procedures.*

### **Manually Adding User-defined Field Columns to Contact2**

Users who are experienced with their database server can manually add user-defined field columns to the CONTACT2 table *instead* of rebuilding. Using the following procedure, you can add custom fields more quickly, and will not have to reset table privileges.

To add user-defined fields to CONTACT2:

1. Add the user-defined field in GoldMine, as described in "Working with Custom User Fields" on page 69. However, when prompted, *do not rebuild the database*.
2. Using your database server's management utility, open the CONTACT2 table.
3. Add a column with the same name, length, and properties as your user-defined field.
4. Restart GoldMine.

For more details to manually add user-defined field columns to the CONTACT2 table *instead* of rebuilding, see FactsBack #527, which you can download from the GoldMine Software Web site at <http://www.goldmine.com>.

### **Manually Adding or Replacing Indexes**

You can manually add or replace indexes instead of indexing and rebuilding. The following method produces the same results as reindexing using **GoldMine's Maintenance Wizard**, but is much faster.

To manually add or replace indexes:

1. Using your database server's management utility, open the problematic table.
2. Add or modify the required index, as described in "Database Structures" in *Integrating with GoldMine Sales and Marketing*.

### **Preventing Corrupt Indexes**

Corrupt indexes are usually caused when an index file is not updated after a data file has been changed. To reduce the occurrence of corrupt index files in GoldMine:

- *Never* turn off your PC – or reboot – before *completely* exiting GoldMine. To exit to Windows, press **[ALT]-[F4]**.
- Network users should also log out of the file server before powering down the PC. Turning off the PC before logging out is the single most common cause of index file corruption.
- Use a battery backup device. If power is lost, GoldMine could be interrupted while writing to a disk. This is almost certain to cause damage to index files, and possibly also to databases.

Single-user GoldMine: run SCANDISK.EXE occasionally, or a similar utility, to test the integrity of your disk drive. See your Windows or network operating system manual for details.

## Consolidating Duplicate Records

Users may accidentally create duplicate contact records in GoldMine. Over time, the number of duplicate contact records may be too great for manual deletion. GoldMine provides a safe way to delete duplicate records automatically with the **Merge/Purge** wizard. The wizard simplifies the replacement process by guiding you through the entire procedure.

Using the **Merge/Purge** wizard, you can select records based on a predefined profile, or define your own criteria. You can set up a custom merge/purge profile by defining the following criteria:

- **Contact record fields:** select as many as you want GoldMine to use during the evaluation process to match records.
- **Method:** select a criterion for each record match, which can be case-sensitive, case-insensitive, Soundex, or first  $n$  characters.
- **Weight:** select and assign a numeric weight to each criterion. When a record is evaluated, each match with a criterion earns the assigned weight value. If the total weight earned by matches between two records and the specified criteria equal or exceed the qualifying weight value, GoldMine selects the records as duplicates.

You can also select the method for disposing of duplicate records. You can either merge data from two duplicate records to create one updated record, or delete one of the duplicates according to a condition, such as deleting the older record. You can specify that GoldMine either process the merge/purge automatically, or display duplicate records for viewing or manual deletion.



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We highly recommend selecting **Dry run: Only show duplicates—do not merge nor purge** before actually performing a purge.

---

To consolidate duplicate contact records:

From the Main Menu, select **Tools|Merge/Purge Records/Merge/Purge Wizard**.

**GoldMine  
Merge/Purge  
Wizard**



The **GoldMine Merge/Purge Wizard** offers two procedures:

**Merge/Purge using a predefined profile** Displays the **Select a Merge/Purge Profile** dialog box, which contains a list of previously defined merge/purge profiles. Highlight the profile that you want to use to search for duplicate records.

**Merge/Purge using new criterias** Allows you to set up weighted criteria for the current merge/purge. The settings can be used for one time only, or saved as a merge/purge profile for future use.

When you select the type of merge/purge you want to conduct, select **Next>**.

If you selected **Merge/Purge using a predefined profile**, you can select the profile from the **Select a Merge/Purge Profile** dialog box, then select **Next>** to display the **Select a Filter/Group** dialog box.

If you select **Merge/Purge using new criteria**, the **Select a Filter/Group** dialog box is the next dialog box that appears.

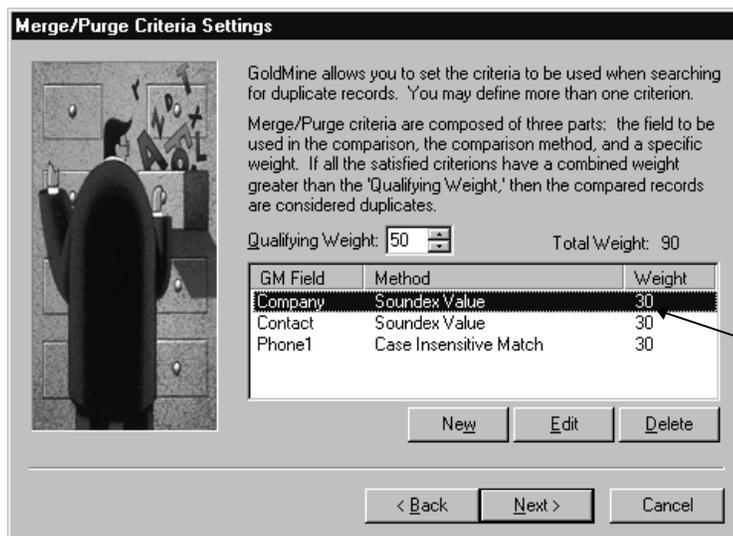
Select a Filter/Group dialog box



To specify which contacts that you want GoldMine to check for duplicates, click  to display a drop-down list. You can select **ALL Contact Records!**, or select a filter or group as the basis for selecting contacts.

When done, select **Next>**.

Merge/Purge Criteria Settings dialog box



If you select a predefined profile, the criteria will appear

If you have selected a profile, the previously defined criteria for the GoldMine fields, the selection methods, and the assigned weight values appears. These criteria cannot be changed or deleted.

The **Merge/Purge Criteria Settings** dialog box contains the following information:

**Qualifying Weight** Minimum value that records must meet based on matching defined field and criteria values for GoldMine to select these records as duplicates. For example, if the **Qualifying Weight** value is 50, two records must match as many weighted criteria as needed to attain a weight value equal to or greater than 50 for selection as duplicates. If records have matched criteria with a total weight of 70, GoldMine selects the records. However, if records have only matched criteria that total 40, GoldMine does not select the records as duplicates.

The default value is 50. To change the value, *either* type a new value from 1-100 in the field, *or* click on the spin controls to the right of the field to increase or decrease the weight value.

**GM Field** Name of the field on which GoldMine will search for a match.

**Method** Type of match that the entry in **GM Field** must meet for selection. GoldMine can look for a match based on Soundex, an exact match, a first-word match, or a match of identical characters at the beginning of a term.

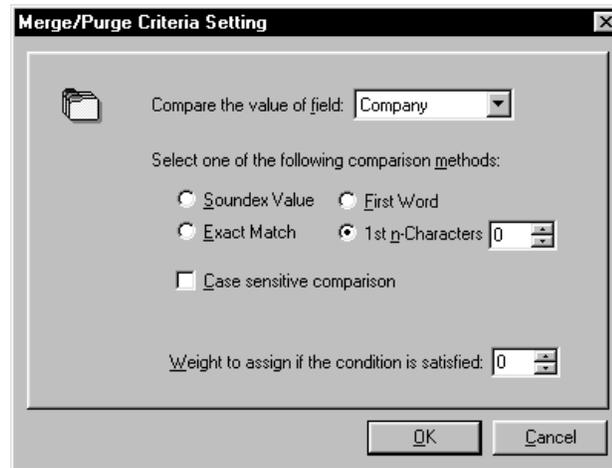
By default, GoldMine performs a case-insensitive search, which does not require entries in the comparison field to have the same upper- and lower-case characters. However, a case-sensitive option is available for all comparison methods except Soundex. A case-sensitive comparison requires that entries have the *same* upper- and lower-case characters to be considered as matching. For example, in a case-sensitive search, *president* is *not* selected as a match to *President*.

**Weight** Numeric value assigned to the defined search criterion. If the entry in **GM Field** meets the condition, the record accrues this value. If the record accrues enough weight values from meeting individual conditions so that the sum is equal to or greater than the **Qualifying Weight** value, GoldMine selects the record.

To remove a criterion, highlight the criterion, then select **Delete**.

To add a criterion, select **Add**. To edit a criterion, highlight the criterion, then select **Edit**.

*Merge/Purge  
Criteria Setting  
dialog box*



The **Merge/Purge Criteria Setting** dialog box contains the following options:

**Compare the value of field** Selects the field from which GoldMine will compare values during the search. To select a field, click on the arrow to the right of the field to display a list of available GoldMine fields. Move the scroll bar or scroll through the list to highlight the field that you want to select, then click on the field name.

**Soundex Value** Compares records for *similar-sounding* entries in the specified field. For example, prezadent and Presedint are selected as matches to President.



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To add a requirement that the first word entries have matching upper- and lower-case characters, also select **Case sensitive comparison**.

---

**Exact Match** Compares records for the same entry in the specified field.

**First Word** Compares records for the same initial word in the specified field, without regard to upper- and lower-case characters.

For example, if you have seen two records for a contact `Xavier Babayova`, but are not sure that the last name was spelled the same in both records, select the comparison field **Contact**, and comparison method **First Word** to search for an exact match on the contact's first name, which is `Xavier`.

**1st n-Characters** Compares records for the same characters for a user-specified number of characters, without regard to upper- and lower-case.

For example, if you select the **City** field, then set this option for the first three characters `New`, GoldMine will match records with city entries, such as `Newbury Park`, `Newhall`, and `Newport Beach`.

**Case sensitive comparison** Check this box to require that compared field entries have the same upper- and lower-case characters to be selected. For example, `president` is *not* selected as a match to `President`. This option is available for **Exact Match**, **First Word**, and **1st n-Characters** conditions.

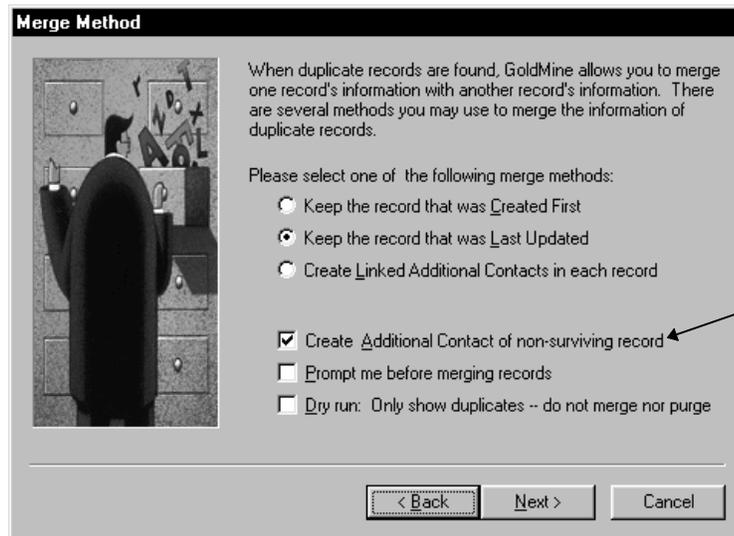
**Weight to assign if the condition is satisfied** Associates a numeric value with the condition. If the entry in the comparison field meets the condition, the record accrues this value. If the record accrues enough weight values from meeting individual conditions so that the sum is equal to or greater than the **Qualifying Weight** value, GoldMine selects the record.

To assign a weight value, *either* type a numeric value from 1–100 in the field, *or* click on the spin controls to the right of the field.

When done, select **OK**. The **Merge/Purge Criteria Settings** dialog box appears. GoldMine displays the new condition in alphabetical order by field name in the criteria listing.

To continue, select **Next>**.

**Merge Method dialog box**



Select this option to save data from a duplicate record as a new additional contact

The **Merge Method** dialog box contains settings that determine how GoldMine treats records selected as duplicates. You must select a setting whether working with a predefined merge/purge profile or a new profile.

To determine the manner in which duplicates are treated, select one of the following options:

**Keep the record that was Created First**

Selects the contact record that was saved first. This date is determined by the entry logged in the **Creation** field of the **Summary** tab.

**Keep the record that was Last Updated**

Selects the contact record that was last changed. This date is determined by the entry logged in the **Last Update** field of the **Summary** tab.



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For details about the **Summary** tab, see "Summary Tab" in the online Help.

---

**Create Linked Additional Contacts in each record** GoldMine keeps both records, and creates additional contacts under the **Contacts** tab of the duplicate records, so that each contact is listed as an additional contact for the other record. For example, if GoldMine determines that Jon Smith and John Smyth are duplicate contacts, Jon Smith will be added as an additional contact in the John Smyth contact record. John Smyth will be added as an additional contact in the Jon Smith contact record.

**Create Additional Contact of non-surviving record** The primary contact of the deleted duplicate record is stored as an additional contact in the surviving contact record. GoldMine stores the new additional contact in the **Contacts** tab of the *surviving* contact record.

**Prompt me before merging records** Check this box for GoldMine to display duplicate records and offer options so the user can make individual decisions on each set of duplicate records. This option is available for any of the above four methods.

**Dry run: Only show duplicates—do not merge nor purge** Check this box for GoldMine to display duplicate records without any options to select records for purging. At the end of the process, duplicate records remain in the contact database. This option is available for any of the above four methods.

If you select this merge option, GoldMine does not prompt you for a purge method, but displays the **Save the Merge/Purge Profile** dialog box.



We highly recommend selecting **Dry run: Only show duplicates—do not merge or purge** before actually performing a purge.

---

When you have selected a merge/purge option, select **Next>**. Unless you are performing a dry run, the **Purge Method** dialog box appears.

**Purge Method  
dialog box**



The **Purge Method** dialog box contains two options:

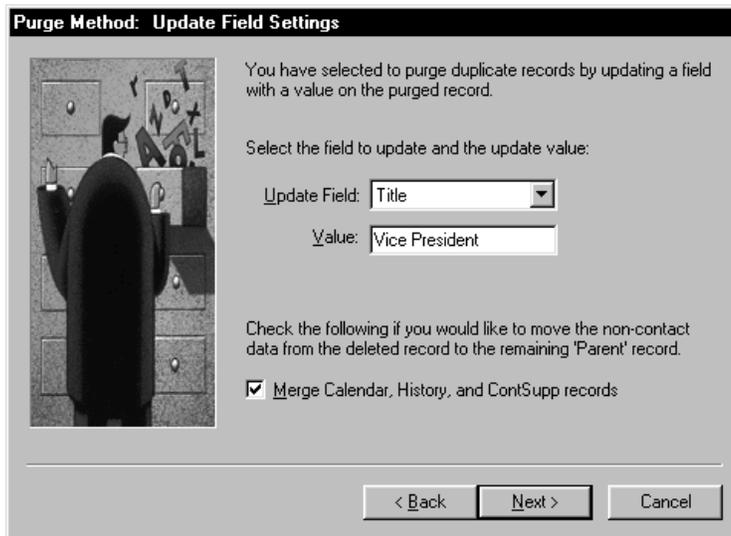
**Delete the  
duplicate  
record**

Allows GoldMine to automatically delete records that meet the qualifying weight as specified in the merge/purge profile.

**Uppdate a field  
with a value  
to indicate  
record deletion**

Changes the specified field with a specified value – selecting this option does *not* purge duplicate records. When you select **Next>**, the **Purge Method: Update Field Settings** dialog box appears.

**Purge Method:  
Update Field  
Settings  
dialog box**



The **Purge Method: Update Field Settings** dialog box contains the following settings:

**Update Field** Selects a field in the record(s) to receive an entry from the **Value** field.

To select which field to update, click on the arrow to the right of the field to display a list of available GoldMine fields. Move the scroll bar or scroll through the list to highlight the field that you want to select, then click on the field name.

**Value** Type the value that you want to insert into the specified **Update Field** in duplicate records. If any record had an entry in the specified field, this data overwrites the existing value.

**Merge Calendar, History, and ContSupp records** Check this box for GoldMine to move data to the surviving contact record(s) from the purged record. This option moves data from the following records:

- Calendar
- History
- Additional contact
- Referral
- Profile

When done, select **Next>**.

**Save the Merge/Purge Profile dialog box**

**Save the Merge/Purge Profile**

You may save this merge/purge profile and its field criteria for use in the future.

Would you like to save these merge/purge settings for later use?

No

Yes

Profile Name:  
Sample Profile

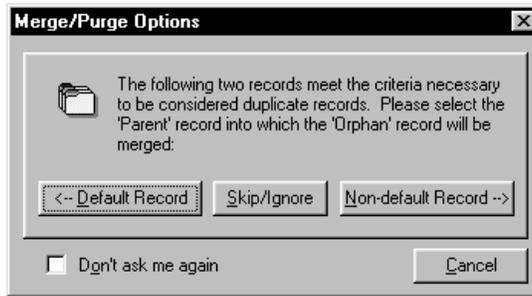
< Back    Next >    Cancel

If you are *either* creating a new merge/purge profile, *or* if you are modifying a predefined merge/purge profile, and you want to use the new profile in the future, select **Yes**. In the **Profile Name** field, type a name for the new profile, then select **Next>**. The **Ready To Merge/Purge** display appears.

When you are ready to start consolidating duplicate records, select **Finish**. If you did not select **Prompt me before merging records**, GoldMine automatically consolidates duplicate records according to your specifications. When done, the **Merge/Purge Options** status window appears, showing the number of duplicate records processed according to the merge/purge profile settings. Select **OK** to clear the status window, and display the currently selected contact record.

If you select **Prompt me before merging records**, GoldMine displays the **Merge/Purge Options** dialog box upon detecting duplicate records.

**Merge/Purge  
Options  
dialog box**



The **Merge/Purge Options** dialog box contains the following options:

- Default Record** Keeps the contact record that meets the merge method criteria, and deletes the other duplicate record. For example, if the merge method is **Keep the record that was Created First**, the default record would be the record with the lowest record creation number, which would indicate that the record was created before the other record.
- Skip/Ignore** Passes the currently displayed duplicate records, and displays the next pair of duplicate records. The passed records remain in the contact database.
- Non-default Record** Keeps the record that does not meet the merge method, and deletes the contact record displayed on the left side of GoldMine's work area.
- Don't ask me again** Check this box for GoldMine to automatically finish processing duplicate records according to the last specified merge/purge option without displaying another prompt.

When done, select **OK**. The **Merge/Purge Options** status window appears, showing the number of duplicate records processed according to the merge/purge profile settings. Select **OK** to clear the status window, and return to the currently selected contact record.

## Deleting Records

Over time, you may need to delete old and/or unwanted information from your contact database. Two separate GoldMine features can delete information from either the current contact record, or all contact records in the database.



In dBASE databases only, a deleted record is not physically erased from the database, but GoldMine does not display or work with the record.

GoldMine “hides” deleted records, in much the same way as filtered records are hidden. GoldMine’s performance slows as the number of deleted records in the contact database increases.

Pack periodically to physically remove these deleted records, and release the disk space occupied by the deleted records – see “Packing and Rebuilding the Database” on page 225.

GoldMine data hosted on SQL servers does not require periodic packing to physically remove deleted records.

### Deleting a Selected Contact Record

You might want to remove an old contact record, but keep the history records associated with the contact. Alternatively, you might want to update a contact record by deleting old history records and/or old activity records.

To delete either a currently active contact record or specific information from the contact record:

Select the contact record that you want to delete as the currently active record. From the Main Menu, select **E**dit|**D**elete Contact.

*Delete Contact Record dialog box*



The **Delete Contact Record** dialog box contains the following options:

**Delete this Contact Record** Deletes the current contact record, including all its related additional contacts, profile entries, and referrals. History records for the contact are *not* deleted, but become unlinked history entries.

**Delete contact's scheduled activities** Deletes all pending activities for the current contact.

**Delete contact's history records** Deletes all history of activities for the current contact record. Since the same history file is used for viewing the **Completed Activities** history for a specific user, deleting the history of a contact record affects the activity analysis statistics for all the users who have completed those activities.

**Delete contact's opportunity/project records** Deletes all opportunity and/or projects linked to a contact. These records are removed from the **Oppty**s tab and/or the **Projects** tab. Selecting this option does not delete the opportunity or project from the **Opportunity/Project Manager**.

**Synchronize this record's deletions** Allows deletions associated with this contact record to be synchronized with remote sites. For details on synchronizing, see *Synchronizing with GoldMine Sales and Marketing*.

**Delete** Deletes the specified information from the active contact record, or deletes the contact record.



---

By default, **Delete this contact record** is selected. Since you can select more than one option, be sure to review which boxes are checked *before* you select **Delete**. After GoldMine performs the deletion, **Edit|Undo** is not available.

---

When done, GoldMine briefly displays information about the outcome of the deletion – that is, specifically what records were deleted with the contact record – on the right side of the status bar.

## Deleting All Contact Records

At some time, you might need to update your contact database by deleting some or all **Calendar** records, history records, all 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.

To delete records from your contact database with the **Delete Wizard**:

From the Main Menu, select **Tools|Delete Records Wizard**.

### Delete Wizard



The **Delete Wizard** dialog box contains the following options:

#### **Delete old history records**

Purges old history data from the contact database. Use this feature to purge the database of history records that are older than a predetermined cut-off date. You can delete all history records from the contact database, or activate a filter or group, 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.

Only users with Master Rights can access this option.

**Delete ALL (filtered) contact records** Typically used with a filter or group to delete a subset of records from the contact database. Although this option can be used without a filter or group to initialize a database, using DOS commands to delete the subdirectory, then recreating the file using the **File|Open File** command is much faster.

Only users with Master Rights can access this option.

**Delete this contact record** Deletes the current contact record, including all associated additional contacts, profile entries, and referrals. History records for the contact are *not* deleted, but become unlinked activities.

When done, select **Next>**.

If you selected *either* **Delete old history records** or **Delete ALL (filtered) contact records**, the next screen displays a drop-down list, from which you can select **ALL Contact Records!**, or select a filter or group as the basis for selecting contacts. When done, select **Next>**.

If you selected **Delete old history records**, the **Delete Old History Records** dialog box appears. Continue with "Deleting Old History Records."

If you selected **Delete ALL (filtered) contact records**, the **Delete ALL Contact Records** dialog box appears. Continue with "Deleting All Contact Records" on page 248.

If you selected **Delete this contact record**, the **Delete This Contact Record** dialog box appears. Continue with "Deleting a Selected Contact Record" on page 250.

### Deleting Old History Records

Once any user with Master Rights selects **Delete old history records** from the **Delete Wizard** dialog box, the **Delete Old History Records** dialog box appears.

**Delete Old History Records dialog box**



The **Delete Old History Records** dialog box contains the following options and information:

**Enter the cutoff date** Deletes all history records created before the date entered in the field. The default entry is the current date.

You can *either* type a date into the field, *or* click  to display a calendar, from which you can select a date.



---

For details on using the graphical calendar to set a date, see “Setting a Date with the Graphical Calendar” in the online Help.

---

**Please type “Delete Old History Records”** Type Delete Old History Records in this field. This requirement reduces the possibility of an unintentional deletion of history records. **Next>** becomes available *only when the entire phrase is typed*. The field is not case-sensitive.

**Filter** Name of the activated filter, if any. GoldMine deletes history records only from members of the subset created by the filter.

When done, select **Next>**. The **About to Delete Records** dialog box appears.

The **About to Delete Records** dialog box contains one option:

**Synchronize deletions** Allows deletions to be synchronized with remote sites – for details about remote synchronization, see *Synchronizing with GoldMine*.

By default, GoldMine activates this option.

Select **Finish** to start deleting history records. GoldMine displays the progress and outcome of the deletion on the right side of the status bar.

### **Deleting All Contact Records**

Typically, you use **Delete ALL contact records** with a filter or group to delete a subset of records from the contact database. Once any user with Master Rights selects **Delete ALL (filtered) contact records** from the **Delete Wizard** dialog box, the **Delete ALL Contact Records** dialog box appears.

**Delete ALL Contact Records dialog box**



The **Delete ALL Contact Records** dialog box contains the following options and information:

**Delete Contact's History Records** Deletes all history of activities for all contact records. Since the same history file is used for viewing the **Completed Activities** history for a specific user, deleting the history of all contact records affects the activity analysis statistics for all users who have completed those activities.

**Delete Contact's Scheduled Activities** Deletes all scheduled activities for all contact records.

**Delete contact's Opportunity/project records** Deletes all opportunity and/or projects linked to a contact. These records are removed from the **Opptys** tab and/or the **Projects** tab. Selecting this option does *not* delete the opportunity or project from the **Opportunity/Project Manager**.



---

For details on opportunities and projects, see “Managing Sales Opportunities and Projects” in the online Help.

---

**Please type “Delete ALL Contact Records”** Type `Delete ALL Contact Records` in this field. This requirement reduces the possibility of an unintentional deletion of contact records. **Next>** becomes available *only when the entire phrase is typed*. The field is not case-sensitive.

**Filter** Name of the activated filter, if any. GoldMine will delete history records only from members of the subset created by the filter.

When done, select **Next>**. The **About to Delete Records** dialog box appears.

The **About to Delete Records** dialog box contains one option:

**Synchronize deletions** Allows deletions to be synchronized with remote sites – for details about remote synchronization, see *Synchronizing with GoldMine*.

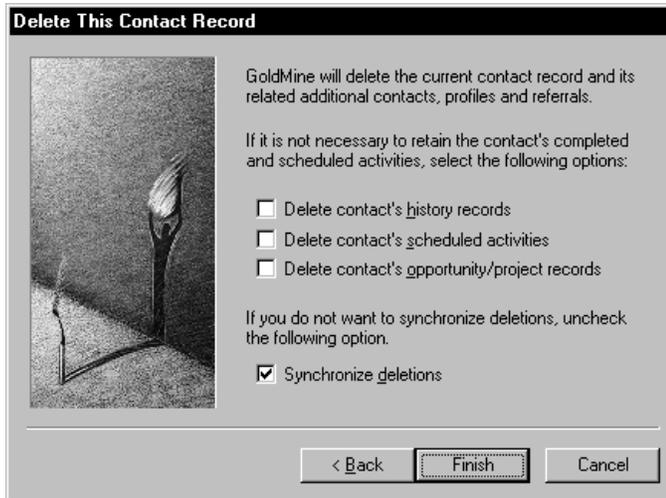
By default, GoldMine activates this option.

Select **Finish** to start deleting records. GoldMine displays the progress and outcome of the deletion on the right side of the status bar.

### Deleting a Selected Contact Record

You can select **Delete This Contact Record** to delete a selected contact record and/or delete history records and pending activities associated with the contact record. Once you select **Delete this contact record** from the **Delete Wizard** dialog box, the **Delete This Contact Record** dialog box appears.

*Delete This Contact Record dialog box*



The **Delete This Contact Record** dialog box contains the following options:

**Delete Contact's History Records** Deletes all history of activities for all contact records. Since the same history file is used for viewing the **Completed Activities** history for a specific user, deleting the history of all contact records affects the activity analysis statistics for all users who have completed those activities.

**Delete Contact's Scheduled Activities** Deletes all scheduled activities for the selected contact record.

**Delete contact's opportunity/project records** Deletes all opportunity and/or projects linked to a contact. These records are removed from the **Oppty**s tab and/or the **Projects** tab. Selecting this option does *not* delete the opportunity or project from the **Opportunity/Project Manager**.



---

For details on opportunities and projects, see “Managing Sales Opportunities and Projects” in the online Help.

---

**Synchronize deletions** Allows deletions associated with this contact record to be synchronized with remote sites. For details on synchronizing see *Synchronizing with GoldMine*.

You can select history records and/or scheduled activities for deletion. When done, select **Finish**. GoldMine briefly displays information about the outcome of the deletion – that is, specifically what records were deleted with the contact record – on the right side of the status bar.

## ***Making Global Changes to Contact Records***

When working with a large number of records, making the same change to each record can be tedious and time-consuming. Globally replacing data can add or change information in a large database without requiring manual entry on each record. GoldMine’s **Global Replace Wizard** can automatically update one or more fields in your contact database. The wizard simplifies the replacement process by guiding you through the entire procedure.



---

We strongly recommend that you back up data before performing a global replacement. There is no “undo” option for global changes. If a change is made by mistake, you can only “correct” the error by restoring data from a backup.

---

To globally replace data in selected fields:

From the Main Menu, select **Tools|Global Replace Wizard**.

**Global  
Replace Wizard**



---

Performing a global replacement with an active filter or group allows you to selectively update data in the contact database. When a filter or group is active, only records matching the filter or group are affected.

---

GoldMine's **Global Replace Wizard** provides three different options for updating data in selected fields:

- Replacing a field with a value
- Updating a field using an advanced option
- Exchanging the values of two fields

This process adds or replaces data in one or more fields with the values that you specify. To change the label of a field, see "Defining a Field on page 71.



---

Use any global replacement feature with caution: **Replace a Field With a Value** replaces the data in a specified GoldMine field with any value that you enter. GoldMine *replaces the data in all records – unless a filter or group is active – regardless of whether data was previously present.* For this reason, never perform a global replacement function on the **Account Number** field.

---

## Replacing a Field with a Value

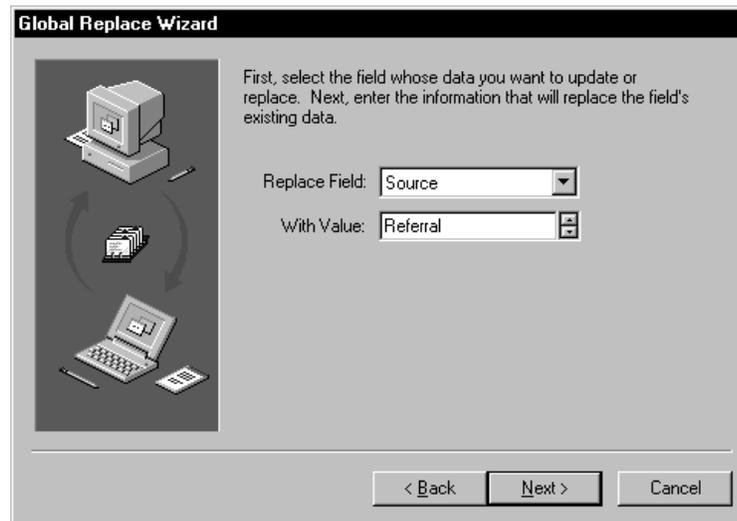
Using GoldMine's **Global Replace Wizard**, you can update a field with a specific value. Entering a single value with the global replace can save a lot of time, as shown in the following scenario.

You have just entered leads from a recent mailing into a new contact set and forgot to enter information in the **Source** field. Source information needs to be entered into all the records in the database. Although the information could be entered manually into the **Source** field on each record, you can avoid editing all those records individually by selecting **Replace a Field with a Value**. By using this feature, you can set up GoldMine to enter the source information automatically in the field of each record.

To globally replace field entries with a value:

From the Main Menu, select **Tools|Global Replace Wizard**. The **Global Replace Wizard** appears, as shown in the figure on page 252. Select **Replace a Field with a Value**, then select **Next>**.

**Global  
Replace Wizard**



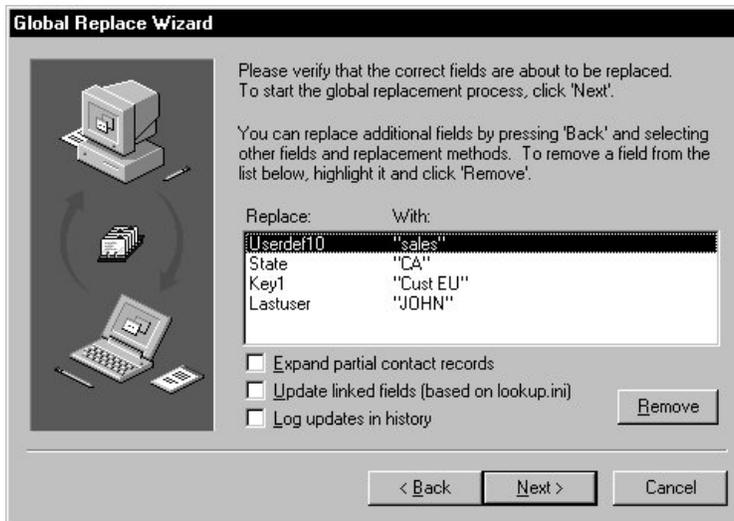
The **Global Replace Wizard** contains two fields:

**Replace Field** Specifies the field to be updated; that is, the data in this field will be replaced by the value specified in the **With Value** field. To display a list of GoldMine fields that you can replace, click on the arrow to the right of the field.

**With Value** Specifies the replacement value that will be placed in the **Replace Field**. GoldMine will replace the specified field in all contact records with the value in this field. For example, if the **Replace Field** is **City**, and the **With Value** entry is Long Beach, GoldMine will replace all **City** entries with Long Beach.

When done, select **Next>**.

**Global  
Replace Wizard**



The **Global Replace Wizard** now displays the selected field(s) and replacement value(s). You can also select one or more of the following options:

**Expand partial contact records** Expands partial records in the database into complete records *if* the field to be replaced is contained in the CONTACT2 file – for a list of CONTACT2 fields, see “CONTACT2.DBF” in “Database Structures” in the online Help. If the field is contained in the CONTACT2 file, this option is selected by default. If you remove the check from **Expand partial contact records**, partial records are *not* expanded, and field values in these records are *not* updated.



---

By default, GoldMine creates partial contact records when you enter only primary contact data – such as company name, contact, and address – for a new contact record. This method requires less disk space than required for a complete contact record.

However, when additional entries require more space, GoldMine automatically converts a partial record to a complete record. Unchecking **Expand partial contact records** prevents GoldMine from automatically converting partial records during a global replacement.

---

**Log updates in history**

Records global changes to field(s) in the following **System Logs**:

- **Process Monitor Logs:** displays the date, time, user, and number of records affected by the global replacement
- **Contact Files Logs:** displays the date, time, user, field name, and the value inserted by the global replacement

This option appears only if you have selected **Log updates in history** for each field from the **Field Label** dialog box, which you can access by pressing *C* and double-clicking on the field label.

For details about viewing GoldMine’s **System Logs**, see “Viewing Logs of System Activity” on page 219.

**Update linked fields (based on lookup.ini)**

Changes values in linked fields according to the instructions in the [AutoUpdate] section of the LOOKUP.INI file. This option is available only if one or more selected fields include field(s) listed in LOOKUP.INI. For details about LOOKUP.INI, see “Updating GoldMine Fields” on page 311.

**Remove**

Deletes the highlighted global replacement entry.

You can globally replace more than one field at a time. To add another field and replacement value, select **<Back**, which returns to the **Global Replace Wizard**, as shown in the figure on page 253.



---

If you have more than one replacement entry, **Remove** becomes active. You can delete any entry other than a single entry.

---

When done adding fields and values, select **Next>**. The next dialog box in the **Global Replace Wizard** allows you to check the field(s) and replacement value(s) before initiating the process. For details on options in this dialog box, see page 254.

When done, select **Next>**. The **Global Replace** launch display appears. Select **Finish**. When the global replacement is finished, the currently selected contact record appears. To see the change(s), move through the records in your contact database.

### **Replacing a Field with Another Field**

Using GoldMine's **Global Replace Wizard**, you can update data in one field with data from another field in one of two ways:

- Exchanging values of two specified fields on a contact record
- Replacing the value of one field on a contact record with the value of another field

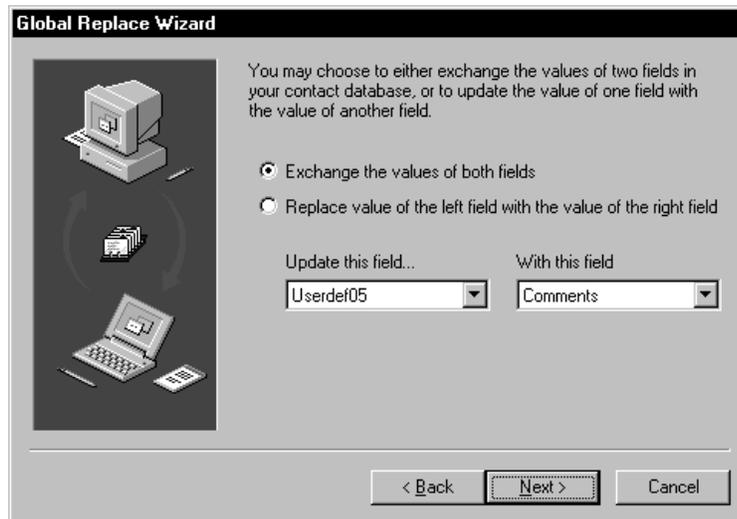
For example, John Doe has GoldMine's User-Defined field number 5 set up as **Salesman**, and he needs to sort and find his contacts by their regular salesman. To do so, John must move all the salesman's names from User-Defined field 5 to the User-Defined KEY 3, which has an index. John can select **Exchange the values of two fields** to move the data from User-Defined field 5 to User-Defined KEY 3.

You can also select **Exchange the values of two fields** to *trade* the value of two fields. Suppose John Doe wants to use a User-Defined Field as an indexed field, but all of his indexed fields are used. By selecting **Exchange the values of two fields**, John can replace the user field with the data from the indexed field, and replace the indexed field with the value in the user field.

To globally replace one field value with another field value, or to exchange the values of two fields:

From the Main Menu, select **Tools|Global Replace Wizard**. The **Global Replace Wizard** appears. Select **Exchange the values of two fields**, then select **Next>**.

**Global  
Replace Wizard**



The **Global Replace Wizard** now contains the following options:

**Exchange the  
values of  
both fields**

Trades the value of one specified field with the value of a second specified field.

**Replace value  
of the left field  
with the value  
of the right  
field**

Inserts the value in the first specified field with the value in the second specified field. The second specified field remains unchanged.

**Update this  
field**

Specifies the field to replace or exchange. To display a list of GoldMine fields, click on the arrow to the right of the field.

**With this field**

Specifies the field that will *either* exchange data with the first field, *or* provide the replacement value. To display a list of GoldMine fields, click on the arrow to the right of the field.



---

GoldMine converts the replacement data into the appropriate data type before copying the data into the selected replace field.

---

When done, select **Next>**. The next dialog box in the **Global Replace Wizard** allows you to check the field(s) and replacement value(s) before initiating the process. For details on options in this dialog box, see page 254.

You can globally replace more than one field at a time. To add another field and replacement value, select **<Back**, which returns to the **Global Replace Wizard** dialog box, as shown in the figure on page 253.

When done adding fields and values, select **Next>**. The **Global Replace** launch display appears. Select **Finish**. When the global replacement is finished, the currently selected contact record appears. To see the change(s), move through the records in your contact database.

### **Replacing a Field with Advanced Options**

For an experienced user, *GoldMine* provides three advanced global field replacement options:

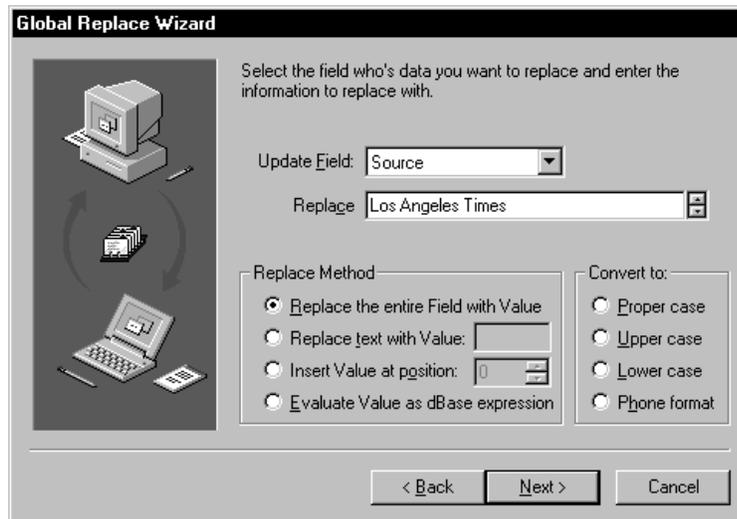
- Replacing an entire field with a value
- Replacing field text only with a value
- Evaluating the replacement value as a dBASE expression

Using the **Global Replace Wizard**, you can combine multiple options in one operation.

To globally replace a field value using advanced options:

From the Main Menu, select **Tools|Global Replace Wizard**. The **Global Replace Wizard** appears, as shown in the figure on page 252. Select the **Update a field using advanced options**, then select **Next>**.

**Global  
Replace Wizard**



The **Global Replace Wizard** now contains the following options:

- Update Field** Specifies the field to replace with the selected advanced option. To display a list of GoldMine fields, click on the arrow to the right of the field.
- Replace** Type the value to insert into the specified field. GoldMine replaces the specified field in all contact records with this value.
- Replace the entire Field with Value** Removes any entry in the field, and inserts the **Replace** entry.
- Replace text with Value** Removes text only from the field and inserts the value from this field. The list scrolls as you type the replacement value. No lookup list is available for this option.
- Insert Value at position** Specifies the position, in character spaces, where the replacement value appears in the specified field.

- Evaluate Value as dBase expression** Replaces the field with the result of the dBASE expression entered in **Replace**. For details, see “Replacing a Field with a dBASE Expression” on page 261.
- (Convert to Proper case)** Converts characters in the field value to initial capitals. For example, if the field value is ACME PRODUCTS, the entry is converted to Acme Products.
- (Convert to Upper case)** Converts all alphabetic characters in the field value to capital letters. For example, if the field value is Acme Products, the entry is converted to ACME PRODUCTS.
- (Convert to Lower case)** Converts all alphabetic characters in the field value to lower-case letters. For example, if the field value is Acme Products, the entry is converted to acme products.
- (Convert to Phone format)** Converts all telephone numbers in the replacement entry to the format that has been selected for the record. Telephone numbers in contact records set up for a USA format appear as (999)999-9999; telephone numbers in contact records set up for an international phone format have no formatting applied.




---

For details on formatting telephone numbers, see “Formatting Telephone Numbers” in the online Help.

---

When done, select **Next>**. The next dialog box in the **Global Replace Wizard** allows you to check the field(s) and replacement value(s) before initiating the process. For details on options in this dialog box, see page 254.

You can globally replace more than one field at a time. To add another field and replacement value, select **<Back**, which returns to the **Global Replace Wizard**, as shown in the figure on page 253.

When done adding fields and values, select **Next>**. The next dialog box in the **Global Replace Wizard** allows you to check the field(s) and replacement value(s) before initiating the process. For details on options in this dialog box, see page 254.

When done, select **Next>**. The **Global Replace** launch display appears. Select **Finish**. When the global replacement is finished, the currently selected contact record appears. To see the change(s), move through the records in your contact database.

### ***Replacing a Field with a dBASE Expression***

**Evaluate Value as dBase expression** is a sophisticated feature that allows an experienced GoldMine user to replace a field with virtually any combination of data.

Suppose the dBASE data file that you want to import into GoldMine contains separate fields for the contact's first name and last name. You should import both fields into GoldMine's contact name field.

To do this, the data must first be imported into GoldMine so that each field from the source (input) database is represented in the GoldMine database. Assume the contact's first name has been imported into the **Contact** field, and the contact's last name has been imported into the **Last** field. For details on importing data into GoldMine, see "Importing and Exporting Data" on page 1.

Once the data is successfully imported, select **Evaluate Value as dBase expression** to replace the **Contact** field with a combination of the **Contact** field and the **Last Name** field. In the **Global Replace** dialog box, select the **Contact** field as the **Update Field**; that is, the field to replace.

The expression chosen to replace the **Contact** field must copy the contact's last name to the end of the first name field, which is already in the **Contact** field. To do so, you might incorrectly enter the following expression:

```
CONTACT1->CONTACT+CONTACT1->LASTNAME
```

The above expression does *not* work correctly since GoldMine stores data in a fixed-length format, which means data is packed with spaces to fill the entire field. The expression shown above adds the **Last Name** field to the end of the **Contact** field, and places the result in the **Contact** field. Since the **Contact** field is already completely filled with spaces, the **Last Name** field is attached to the end of the spaces. When the new data is copied back into the **Contact** field, any characters after the end of the field are truncated, or clipped off. The result will be that the **Contact** field will still contain only the contact's first name.

The dBASE TRIM() function can be used to remove the trailing spaces from the **Contact** field, allowing the **Last Name** to be appended correctly to the end of the field. The appropriate expression is:

```
LTrim(Trim(CONTACT1->CONTACT)+ " " + CONTACT1->LASTNAME)
```

The TRIM() function removes the trailing spaces from the **Contact** field, allowing a “hard” space character and the **Last Name** value to be appended after the hard space. The LTRIM() function then removes that “hard” space in the unusual event that a contact has no first name. The resulting field, correctly linked and truncated, is then copied back into the **Contact** field.

## Backing up Data

Occasionally, you might encounter a problem while working in GoldMine that might cause data loss or data corruption. The problems may be internal or external to your system. The best way to ensure data availability in the event of data loss or corruption is a regular program of data backup.



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Performing regular data backups requires technical expertise. If a person with an intermediate knowledge of Windows is *not* available in your organization, contact a GoldMine Solutions Partner for assistance.

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To maintain an optimal backup system, make a separate backup on each day for two weeks. That is, your backup system should include 10 individual backups. Two weeks of backups are recommended because data corruption may not be discovered for several days. Having only one or a few sets of backups would therefore also contain corrupted data.

## Selecting a Backup System

Selecting the best hardware and software to perform backups can depend upon a variety of factors. No one backup system fits all needs. To select and set up a backup system that will meet the needs of your organization, contact a GoldMine Solutions Partner.

The most typical medium for archiving your backups is tape, but you can use diskettes. Each diskette will hold approximately 500 contact records. Allow at least two additional diskettes for “overhead” data, such as program files and setup data. For example, to back up a database with 2,000 contact records, you could use one tape or six diskettes. To maintain a proper backup archive would require two weeks of backups. Therefore, you would need either ten backup tapes, or 60 diskettes.

Label the diskettes so that their chronological position is clear. For example, you could label your tapes as Monday 1 (Monday of the first week), Monday 2 (Monday of the second week), Tuesday 1, Tuesday 2, etc.

For added security, consider keeping a backup in a deposit box of a bank. This backup would ensure data integrity in the event of physical destruction to your office, such as a fire. Be sure to periodically update the backup.

### Selecting Files to Back up

You can develop your backup program to archive some or all of your GoldMine files as follows:

- All contact data, setup data, and program files
- Contact data and setup data
- Contact data only




---

*We strongly recommend that you maintain regular backups of all GoldMine contact data, setup data, and program files. To back up contact data in GoldMine FrontOffice 2000, you must use a utility designed to back up SQL data.*

---

Table 3 on the following page lists the files and typical locations (in a dBASE database) for a full backup of GoldMine contact data, setup data, and program files.

<b>Table 3.</b>	<b>Location</b>	<b>File Specifications</b>
<b>Full Backup</b>	\GoldMine\ 	*.EXE
	\GoldMine\ 	*.D*
	\GoldMine\Reports	*.FP
	All other subdirectories of \GoldMine\ 	*.D*

Table 4 lists the files and typical locations (in a dBASE database) for an intermediate backup of GoldMine contact data, and setup data.

<b>Table 4.</b>	<b>Location</b>	<b>File Specifications</b>
<b>Intermediate Backup</b>	\GoldMine\ 	*.D*
	\GoldMine\Reports	*.FP
	All other subdirectories of \GoldMine\ 	*.D*



### Features and Benefits

The following scenario illustrates the features and benefits of the Master License:

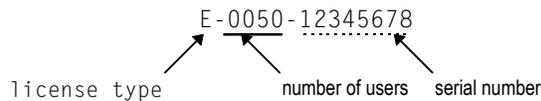
ABC Company's New York headquarters is a networked office of 30 users. ABC also has offices in Boston and Seattle with 10 users each. All 50 people in the organization have notebook PCs, and routinely synchronize.

ABC would purchase a 50-user GoldMine Sales and Marketing license and a 50-user GoldSync 5.0 license. These licenses would be installed once, on the headquarters' network, and serve as the primary Master License. Using GoldMine's License Manager, ABC will create two Site Licenses of 10 users each: one Site License for Seattle, and one Site License for Boston.

These sublicenses will be installed on the networks in those cities, and serve as Site Licenses of the original Master License. From the Master License, or any of the Site Licenses, ABC can then create sublicenses for each of the remote users' notebooks; that is, the Undocked License. All these licenses throughout the organization share the *same* GoldMine serial number.

This flexible licensing hierarchy simplifies GoldMine's licensing, and also enables the Master and Site Licenses to control the security and content of each of their remote undocked users!

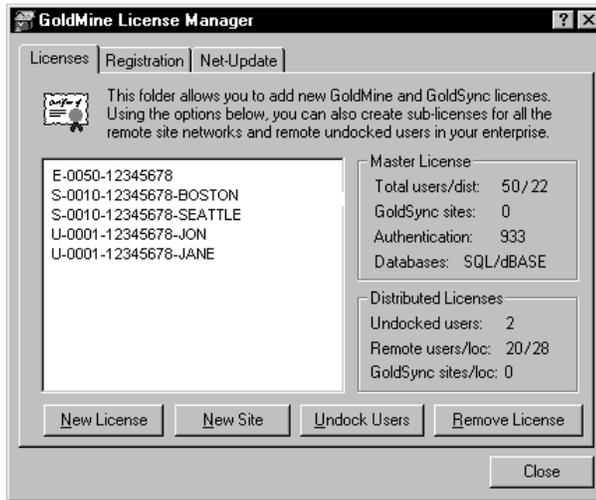
A GoldMine Sales and Marketing license looks like the following example:



The first character denotes the license or sublicense type, E in this example — for a list of types, see “License Types” on the facing page. The first set of numbers denotes the license count, 50 users in this example. The last set of numbers denotes the actual serial number, 12345678. The Site License for the Boston office would be S-0010-12345678-BOSTON. The Undocked Sublicense for user JON would be U-0001-12345678-JON.

GoldMine's **License Manager** shows all the remote sites controlled by the current license. The **License Manager** of the GoldMine system running in ABC's New York headquarters will list entries similar to those shown in the following figure.

## GoldMine License Manager



The **License Manager** of the Site License in Boston will show:

S-0010-12345678-BOSTON

U-0001-12345678-MARK

U-0001-12345678-MARY

### **License Types**

A Master License must be installed *only* on the organization's primary network.

The following Master License types are available:

- E-xxxx GoldSync (xxxx sites), GoldMine Sales and Marketing (xxxx users),
- D-xxxx GoldMine 5.0/dBASE (xxxx users)
- G-xxxx GoldSync (xxxx sites)

The Master License creates the following sublicense types for remote sites and remote users of the organization:

- U-0001 GoldMine (undocked user)
- S-xxxx GoldMine (xxxx users)
- Y-xxxx GoldSync (xxxx sites)

The Master License serial number is inherited by all sublicenses to ensure that all the organization's sublicenses are authenticated during synchronization.

### **Creating a Sublicense**

Creating and installing the sublicenses correctly is important because they control security for synchronization throughout the organization. From the **License Manager**, select *either* **New Site** or **Undocked User**. These options produce the sublicenses to use when installing GoldMine on the remote site networks and undocked notebooks.

### **Increasing the Master License**

Only the Master License can be increased; that is, Site Licenses and Undocked Licenses *cannot* be increased. From the **License Manager**, select **New License**, then enter a new GoldMine or GoldSync serial number.

A Master License increase for GoldMine has a unique letter identification:

B-xxxx GoldMine Sales and Marketing, or GoldMine 5.0 (xxxx users)

However, a GoldSync license increase has the same letter identification as an original license:

G-xxxx GoldSync (xxxx sites)

### **Converting a GoldMine 5.0 License to a GoldMine Sales and Marketing License**

Converting a GoldMine 5.0 license to a GoldMine Sales and Marketing license requires a GoldMine Sales and Marketing license with the same license count (or larger) as the current GoldMine 5.0 license. The current "D" type license will be converted to an "E" license with the original serial number, and the GoldMine Sales and Marketing license count. Remote sites wishing to take advantage of the new license's capabilities will have to re-enter their site licensing information.

### **Working with the License File**

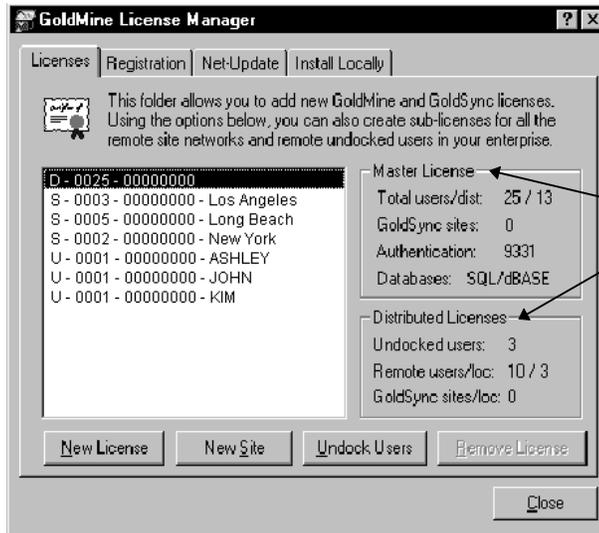
The license file, LICENSE.DBF, must exist only in the GoldMine "root" directory of each GoldMine installation. If the LICENSE.DBF file is deleted, GoldMine will prompt the user for a license number upon the next attempt to log in.

Do *not* delete and recreate the primary Master License file, since a new Master License file creates an authentication seed that will be incompatible with all the existing sublicenses currently using the authentication seed from the original Master License file. If you recreate the Master License, you must regenerate all site and undocked licenses.

### Accessing the GoldMine License Manager

From the Main Menu, select **File|Configure GoldMine|License Manager**.

Licenses tab



GoldMine is sold with a Master License serial number, from which an organization creates sublicenses for individual offices and individual users.

An organization purchases GoldMine with a Master License serial number. This single license allows maximum flexibility for an organization in controlling the data integrity and security for each user. For example, a company might purchase a 50-user GoldMine license, and a 50-user GoldSync license. These licenses can be installed once on the network.

Once installed, the company can then create two 10-user sublicenses for the two branch offices from the Master License. Further, the company can create another type of sublicense for the notebook PCs of *undocked users*. Each license created from the Master License shares the same GoldMine serial number. Sharing the same serial number provides authentication for secure remote synchronization throughout the organization.

## Adding to your GoldMine or GoldSync License

Using the **GoldMine License Manager**, a user with Master Rights can add either GoldMine or GoldSync licenses. You can also convert a GoldMine 5.0 license to a GoldMine Sales and Marketing license.

The **GoldMine License Manager** features the **Licenses** tab from which you start the process to update your GoldMine or GoldSync system. To add one Master License to another Master License, you must enter the serial number of the new license.

From the **GoldMine License Manager**, you can:

- Add a new GoldMine or GoldSync license – continue with “Adding a License.”
- Add a site to a Master License – see “Creating a Sublicense for a Remote Office” on page 270.
- Add an undocked user to a license – see “Creating a Sublicense for an Undocked User” on page 272.
- Delete a GoldMine or GoldSync license or sublicense – see “Removing a License” on page 270.

### Adding a License

To add *either* a GoldMine or GoldSync license from the **GoldMine License Manager**, select **New License**. The **GoldMine License Upgrade** dialog box will appear.

To continue with the upgrade process, select **I AGREE**.

**GoldMine  
License Upgrade  
dialog box**

Type the serial number  
of the new licensed  
copy of either  
GoldMine or GoldSync

Upgrading your GoldMine license allows you to increase the number of concurrent users by purchasing and combining multiple GoldMine licenses.

By combining serial numbers to create a larger Master License, you are accepting the terms of the GoldMine license agreement which state that the license being installed now can only be used with this Master License.

Please enter the new serial number below.

Serial Number:      Key Code

.  .  .

Automatically register

OK      Cancel

In the segmented field, type the serial number of the GoldMine or GoldSync license to be added. By default, GoldMine automatically selects the **Automatically register**. To register at a later time, remove the check from this option.

When done, select **OK**.

GoldMine automatically adds the new license you specified to the previously installed license(s).

To close the **GoldMine License Manager**, select **Close**.

### **Removing a License**

In a multi-license GoldMine or GoldSync system, a user with Master Rights can delete sublicenses, undocked user licenses, or undocked GoldSync licenses (S, U, or Y license types.) Once they are combined, GoldMine 5.0, GoldMine Sales and Marketing, or GoldSync licenses (D, E, or G license types) *cannot* be removed.

To remove a license from the **Licenses** tab of the **GoldMine License Manager**, highlight the license to be deleted, then select **Remove License**.

A prompt asks:

**Are you sure that you want to delete this serial number license?**

To remove the license, select **Yes**. To close the **GoldMine License Manager**, select **Close**.

### **Creating a Sublicense for a Remote Office or Site**

An organization with multiple offices and users can create individual sublicenses for each site or user from the single Master License. A site sublicense will install that license on only *one* remote server. An undocked user sublicense will install that license on only *one* remote PC. However, you can create multiple, different site and undocked licenses up to the maximum permitted by the Master License. To create a sublicense for a remote user, see "Creating a Sublicense for an Undocked User" on page 272.



When installing GoldMine on each remote computer, the user *must* enter the remote site or sublicense number generated by the Master License. There are two methods:

- Highlight the sublicense that appears in *either* the **Sub-License for Remote Site** dialog box, *or* the **Sub-License for Undocked User** dialog box. Press **CTRL** - **C** to copy the entry, then paste in this serial number when installing GoldMine on the remote system.
- Write down the sublicense for the user with the remote system to type the entry when installing GoldMine.

### **Creating a Sublicense for a Remote Office**

To create a sublicense for a remote GoldMine office:

From the **Licenses** tab, select **New Site**.

**Create a Site License dialog box**

The **Create a Site License** dialog box contains the following options:

#### **Distributed License Type**

Generates a sublicense from your Master License for one of the following products:

- **GoldMine Site License**
- **GoldSync Site License**

**Site Name** Name of the site of up to 12 characters and spaces, such as Los Angeles.

**Number of Users** Total number of users included in the sublicense.

**Create Site License** Displays the **Create Sub-License for Remote Site** dialog box, from which you can acknowledge your acceptance of licensing terms as detailed on page iii. When done, select **I AGREE**.

GoldMine will then display the new sublicense for the remote site in a field at the bottom of the dialog box. When done, select **Close**.

GoldMine automatically adds the sublicense to the **Licenses** tab browse window under previously installed license(s). A site sublicense serial number appears with S as the initial character.

If done, select **Close**.

To add undocked users, continue with “Creating a Sublicense for an Undocked User.”

#### ***Creating a Sublicense for an Undocked User***

GoldMine Sales and Marketing enables any user to work with the same GoldMine license as *either* a **docked**, network user, *or* as an **undocked**, remote/mobile user. To work on an undocked basis, a user must have an undocked sublicense on his notebook. You can create an undocked sublicense from either the Master License, or from a site sublicense.

Once an undocked user sublicense has been created, the same individual can work with a notebook PC on a remote basis or connect – dock – the notebook to his PC in the office. That is, a single user who works with GoldMine on both a desktop PC and a notebook PC will *not* need two separate licenses.

Every user supported by the GoldMine license can have a sublicense to work on a remote PC, but GoldMine creates *only* one sublicense for each user. For example, on a five-user copy of GoldMine, a sublicense can be created for each of the five users.

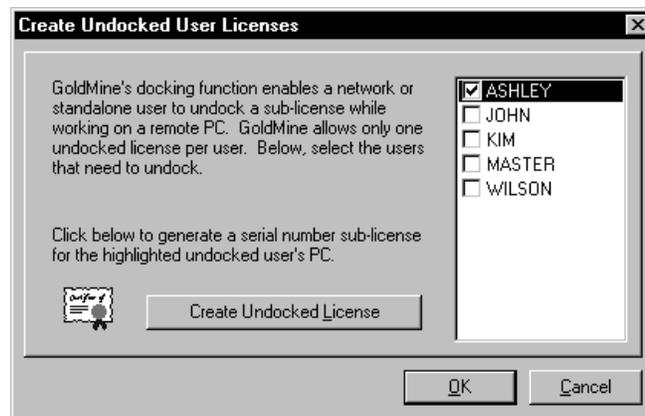
When GoldMine creates an undocked user sublicense, the total license count is reduced by one; that is, only the same total number of users can log in concurrently as are allowed by the Master License, regardless of the number of undocked sublicenses. For example, on a five-user copy of GoldMine, if one undocked user logs in to GoldMine, only four other users can log in at the same time.

All undocked users can log in to GoldMine, as well as the total number of users that make up the difference in the total number allowed by the Master License. For example, on a five-user copy of GoldMine with three undocked users, those three undocked users plus two other users can log in to GoldMine.

To create a sublicense for an undocked GoldMine user:

From the **Licenses** tab, select **U**ndock Users.

**Create Undocked User Licenses dialog box**



To grant docking privileges to a user that appears in the list, place a check in the box corresponding to the user. Select **C**reate Undocked **L**icense.

The **Create Sub-License for Undocked User** dialog box appears, from which you can acknowledge your acceptance of licensing terms. When done, select **I** **A**GREE.

GoldMine will then display the new sublicense for the selected user in a field at the bottom of the dialog box. When done, select **C**lose.

You can create another undocked user sublicense, if needed. When done, select **O**K to close the **Create Undocked User Licenses** dialog box.

## Updating your Copy of GoldMine

Using the **GoldMine License Manager**, you can upgrade your copy of GoldMine Sales and Marketing with the latest revision available. This service is free to all registered users if you are current on your maintenance agreement.

*If multiple users synchronize with GoldMine* – as described in see *Synchronizing with GoldMine Sales and Marketing* – **all GoldMine systems must run the same version of GoldMine**. To maintain the current version on all systems, users can update their copies via Net-Update as described in this section.

Whenever you perform a Net-Update, your registration information is automatically transmitted to GoldMine Software. If you want to update your registration information, see “Updating Registration Information” on page 276.

To download the latest version of GoldMine Sales and Marketing:



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To use the Net-Update feature to access the GoldMine Update Server, you must first connect to your Internet Service Provider (ISP).

---

From the **GoldMine License Manager**, select the **Net-Update** tab.

### Net-Update tab



The **Net-Update** tab contains the following options:

**Net-Update Now** GoldMine automatically logs into the GoldMine Update Server, and downloads the latest version of GoldMine Sales and Marketing, as well as any other files needed to run the new version. To avoid overwriting your currently running copy, GoldMine downloads the file(s) into a subdirectory of your GoldMine root directory, such as C:\Program Files\GoldMine\Setup\GoldMine\.

**Update registration information** Allows you to modify previously entered information in the **Registration** tab – see “Updating Registration Information” on the following page.

When you select **Net-Update Now**, GoldMine connects via the Internet to the GoldMine Update Server, and starts downloading the file(s). The update file is approximately 15MB in size, and can take over an hour to download at typical modem speeds, such as 33.6k bps or 56k bps.

During the download process, GoldMine displays a status window.

When done, a prompt asks:

**The file download is now complete. Would you like to update your GoldMine system now?**

If you are downloading the update to a stand-alone system, continue with “Installing the File Download on a Stand-Alone PC.”

If you are downloading the update to a network, go to “Installing the File Download on a Network.”

***Installing the File Download on a Stand-Alone PC***

If you are running GoldMine on a stand-alone system, select **Yes**. GoldMine shuts down for the installation.

To finish updating your system, see “Installing the Update to GoldMine Sales and Marketing Locally” on page 278.

### ***Installing the File Download on a Network***

You can either install the GoldMine update immediately, or wait until a later time to install the update.



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If you are running GoldMine on a network, all other users must exit GoldMine before you can update the GoldMine system.

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***To install the update immediately:*** Select **Update your GoldMine System Now**. GoldMine shuts down during the installation.

If you are running GoldMine on a network with GoldMine .EXE files installed locally (as on a Windows NT 4.0 or Windows 95/98/2000 network), you must update each workstation with the new files, which can be done automatically. To finish updating your system, see “Installing the Update to GoldMine Sales and Marketing Locally” on page 278.

***To install the update at a later time:*** To run the update, from the Windows Taskbar, select **Start|Run**. The **Run** dialog box will appear. In the **Open** field, type `G:\GOLDMINE\SETUP\GOLDMINE\GM5SETUP.EXE`, substituting the drive letter and path, if necessary.

### ***Updating Registration Information***

While you download the latest version of GoldMine Sales and Marketing, you can also change the registration information of your GoldMine license(s). This information is transmitted to GoldMine Software, as well as entered in the **Registration** tab and on the GoldMine banner display.

To change your registration information from the **GoldMine License Manager**:

From the **Net-Update** tab, select **Update Registration Information**. Select the **Registration** tab.

## Registration tab

GoldMine License Manager

Licenses | **Registration** | Net-Update | Install Locally

To edit your registration information, you must check the Update registration information option in the Net-Update folder. After you make changes here, you must perform the Net-Update to save your changes.

Organization: GoldMine Software

Contact Name: John Doe

E-mail address: jdoe@acmelink.com

Phone / Fax: (310)555-1234 /

Address 1: 17383 Sunset Blvd.

Address 2:

City / State: Pacific Palisades | CA

Zip / Country: 90272 |

Close

The **Registration** tab contains the following information:

- Organization** Name of the company or other organization entered when GoldMine was installed.
- Contact Name** Name of the individual to whom GoldMine is licensed.
- E-mail address** Internet address of the individual entered in **Contact Name**. This address was entered at the time of registration, and may not be the same as the individual's address as entered in the **Internet** tab of the **Preferences** window.
- Phone/Fax** First field displays the voice **Phone** number for the **Organization**; second field displays the **Fax** number for the **Organization**.
- Address** You can enter two lines of address data. Type two spaces after the first line entry to separate the first line entry from the second line entry.
- City/State** First field displays the **City** entry for the **Organization**; second field displays the **State** entry for the **Organization**.

**Zip/Country** First field displays the ZIP Code entry for the **Organization**; second field displays the **Country** entry for the **Organization**.

When done reviewing and/or modifying your registration information, select the **Net-Update** tab. To both permanently enter the changes, and to start the process to download the latest version of GoldMine, select **Net-Update Now**. Continue with “Installing the Update to GoldMine Sales and Marketing Locally.”

### ***Installing the Update to GoldMine Sales and Marketing Locally***

You can install the GoldMine Sales and Marketing update on your local hard disk to increase response speed, and/or to reduce network traffic. Installing locally increases performance by approximately 3-5% in most installations.

You can access the options for installing the update on your hard disk in the **Install Locally** tab. The **Install Locally** tab appears in the **GoldMine License Manager** after you successfully complete your first Net-Update process.



---

For network installations in which the GoldMine .EXE files are run from a local drive instead of a network drive, you *must* update *each workstation* with the new files when the server is updated.

---

**Updating local installations:** To complete the update installation on a network, *either*:

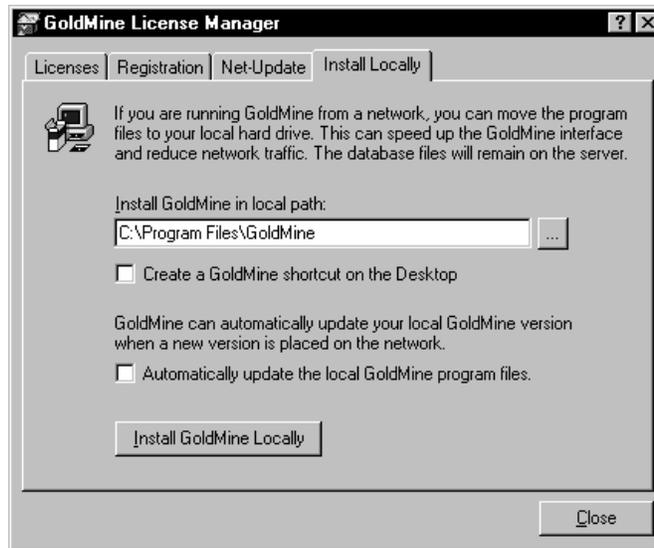
- Manually update GoldMine workstations by copying \*.EXE and \*.DLL from a system that installed the Net-Update to the GoldMine directory (overwriting the files associated with the previous version) of each workstation
- or*
- Perform the following procedure at each workstation.

To install the update for GoldMine Sales and Marketing:

Start GoldMine. From the Main Menu, select **Help|Net-Update**. To access the **GoldMine License Manager** window from the Main Menu, select **File|Configure GoldMine|License Manager**. GoldMine displays the **GoldMine Net-Update** window.

To install the file(s), select the **Install Locally** tab.

**Install  
Locally tab**



The **Install Locally** tab contains the following options:

**Install  
GoldMine in  
local path**

Designates the path to the destination on your local system where GoldMine will copy program files from the network. You can *either* type a path, *or* click  to navigate through the directories on your system.

If you designate a path in this field, the database files remain on the network server. However, the GoldMine program files reside on your system.

**Create a  
GoldMine  
shortcut on the  
Desktop**

Adds  to the desktop of your local system.

**Automatically  
update the  
local GoldMine  
program files**

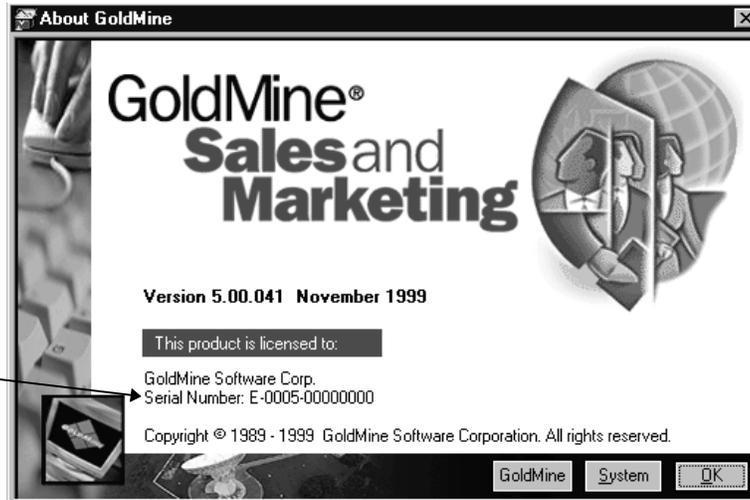
Updates the GoldMine program files on your local hard drive when you install the new version on a network.

**Install GoldMine Locally** Starts installing the update.

**Network installation:** To confirm that each workstation is running the same revision of GoldMine, from the GoldMine Main Menu, select **Help>About**. The following figure shows where to locate the version number and revision date.

**Checking the currently installed version of GoldMine**

Version information includes the product release number and revision date



## Viewing System Logs

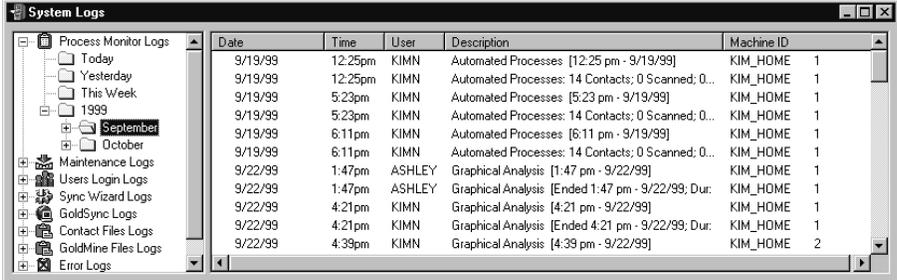
GoldMine records system activity for a variety of operations in *system logs*. From the **System Logs** window, you can view details for:

- Processing activities recorded in the **GoldMine Process Monitor**
- Dates and outcomes of database maintenance procedures
- One selected user's login activity
- Dates and details of synchronization activity
- Changes made to the contact set files
- Changes made to GoldMine files
- Errors that occur in an open dBASE or SQL database

To view GoldMine's system logs:

From the Main Menu, select **View|GoldMine Logs**.

**System Logs**  
window



The screenshot shows the 'System Logs' window. On the left is a tree view with folders for 'Process Monitor Logs', 'Maintenance Logs', 'Users Login Logs', 'GoldSync Logs', 'Contact Files Logs', 'GoldMine Files Logs', and 'Error Logs'. Under 'Process Monitor Logs', there are sub-folders for 'Today', 'Yesterday', 'This Week', and '1999'. Under '1999', there are folders for 'September' and 'October'. The main area is a table with columns: Date, Time, User, Description, and Machine ID.

Date	Time	User	Description	Machine ID
9/19/99	12:25pm	KIMN	Automated Processes: [12:25 pm - 9/19/99]	KIM_HOME 1
9/19/99	12:25pm	KIMN	Automated Processes: 14 Contacts; 0 Scanned; 0...	KIM_HOME 1
9/19/99	5:23pm	KIMN	Automated Processes: [5:23 pm - 9/19/99]	KIM_HOME 1
9/19/99	5:23pm	KIMN	Automated Processes: 14 Contacts; 0 Scanned; 0...	KIM_HOME 1
9/19/99	6:11pm	KIMN	Automated Processes: [6:11 pm - 9/19/99]	KIM_HOME 1
9/19/99	6:11pm	KIMN	Automated Processes: 14 Contacts; 0 Scanned; 0...	KIM_HOME 1
9/22/99	1:47pm	ASHLEY	Graphical Analysis: [1:47 pm - 9/22/99]	KIM_HOME 1
9/22/99	1:47pm	ASHLEY	Graphical Analysis: [Ended 1:47 pm - 9/22/99; Dur:	KIM_HOME 1
9/22/99	4:21pm	KIMN	Graphical Analysis: [4:21 pm - 9/22/99]	KIM_HOME 1
9/22/99	4:21pm	KIMN	Graphical Analysis: [Ended 4:21 pm - 9/22/99; Dur:	KIM_HOME 1
9/22/99	4:39pm	KIMN	Graphical Analysis: [4:39 pm - 9/22/99]	KIM_HOME 2

Each log type in the **System Logs** window shares the following common characteristics:

- You can view the number of records generated for each month of the year by selecting the year folder.
- You can view details for all of the records generated in a month by selecting a month folder.
- All logs contain folders for **Today**, **Yesterday**, **This Week**, and annual folders, except for the **Users Login Logs**, which organizes information in annual folders under a user.
- You can navigate through folders by clicking  next to the folder to display additional folders, or by selecting **Expand** from the local menu at the level you want to open. For example, to display all folders available in the **Process Monitor Logs**, highlight  **Process Monitor Logs**, then select **Expand** from the local menu.
- Each month folder contains individual date folders for every date on which an operation was run.

Each of the logs are described over the following pages, except for the **Error Logs**. For details on the **Error Logs**, see the "Troubleshooting Guide" on page 280.

## Viewing the Process Monitor Logs

You can view details about process activities—such as Automated Processes or synchronization—from the **Process Monitor Logs**.

From the **System Logs** window, *either*:

- Click  next to  **Process Monitor Logs** to display a set of folders  
*or*
- Highlight  **Process Monitor Logs**, then select **Expand** from the local menu to open all folders

Once you select a specific date folder, the **Process Monitor Logs** display the following information in the right pane of the **System Logs** window:

**Date** Date that the process was run.

**Time** Time that the process was run.

**User** User name of the individual who performed the process.

**Description** Brief description of the process, such as **Automated Processes**.

**Machine ID** Unique designation that GoldMine uses to identify the physical PC.

When done viewing the log entries, you can *either* select another folder or system log, *or* click  to close the **System Logs** window.

## Viewing the Maintenance Logs

You can check the dates and outcomes of database indexing and/or rebuilding from GoldMine's **Maintenance Logs**.

From the **System Logs** window, *either*:

- Click  next to  Maintenance Logs to display a set of folders  
*or*
- Highlight  Maintenance Logs, then select **Expand** from the local menu to open all folders

Once you select a specific date folder, the **Maintenance Logs** display the following information in the right pane of the **System Logs** window:

<b>Date</b>	Date that <b>GoldMine's Maintenance Wizard</b> was run.
<b>Time</b>	Time that <b>GoldMine's Maintenance Wizard</b> was run.
<b>User</b>	User name of the individual who performed the maintenance.
<b>Description</b>	Brief description of the maintenance outcome, such as <b>Database maintenance completed successfully</b> .
<b>Machine ID</b>	Unique designation that GoldMine uses to identify the physical PC.

When done viewing the log entries, you can *either* select another folder or system log, *or* click  to close the **System Logs** window.

## Viewing the Users' Login Logs

You can display a log that shows a selected user's activity in GoldMine from the **Users Login Logs**.

From the **System Logs** window, *either*:

- Click  next to  **Users Login Logs** to display a set of folders that looks similar to the following figure.

*or*

- Highlight , then select **Expand** from the local menu to open all folders.

### Viewing the Users' Login Logs



Once you select the user and date that you want to view, the **Users Login Logs** display the following information in the right pane of the **System Logs** window:

**Date** Date of the logged activity by the selected user.

**Login** Time that the user logged into GoldMine.

**Logout** Time that the user logged out of GoldMine.

**Logged** Total amount of time that the user was logged into GoldMine, including any time logged away.

If GoldMine is set to **Track each login** in the **Edit|Preferences|Login** tab, this column shows the logged-in time for one work session.

If GoldMine is set to **Track daily totals** in the **Edit|Preferences|Login** tab, this column shows the cumulative login time for the entire date.

**In** Total number of times that the users logged in to GoldMine.

If GoldMine is set to **Track daily totals** in the **Edit|Preferences|Login** tab, this column shows the number of times that the user logged into GoldMine each day.

If GoldMine is *not* set to **Track each login**, the value in this column is 1.



---

For details on **Login** tab options, see “Defining Login Settings” in the online Help.

---

**Keys** Number of keystrokes pressed by the user while working in GoldMine.

**Clicks** Numbers of mouse clicks performed by the user while working in GoldMine.

**CRC** Indicates whether or not the data in the user log has been modified outside of GoldMine. This column displays **ok** for every log entry that is free of tampering, that is, external modification.

When done viewing the log entries, you can *either* select another folder or system log, *or* click  to close the **System Logs** window.

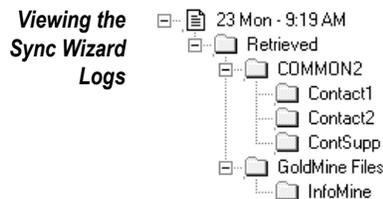
## Viewing the Sync Wizard Logs

You can display the date and time of each attempt to synchronize, as well as the details of records sent and retrieved by synchronizing.

From the **System Logs** window, *either*:

- Click  next to  Sync Wizard Logs to display a set of folders
- or*
- To open all folders, highlight  Sync Wizard Logs, then select **Expand** from the local menu

The **Sync Wizard Logs** display a date/time entry for each attempt by your system to synchronize. If a transfer set was sent or retrieved during synchronization, GoldMine displays folders under the date/time entry. These folders contain folders for the files for which the transfer set included updates. The display for a specific date looks similar to the following figure.



The first set of file folders contains updates for the selected contact set file(s). When you click on a folder, such as Contact1, the details of record updates appear in the right panel. The right-pane display is the same as for the **Contact Files Logs**—for details, see “Viewing the Contact Files Logs” below.

The second set of folders contains updates for GoldMine files. When you click on a folder, such as InfoMine, the details of record updates appear in the right panel. The right-pane display is the same as for the **GoldMine Files Logs**—for details, see page 289.

When done viewing the log entries, you can *either* select another folder or system log, *or* click  to close the **System Logs** window.

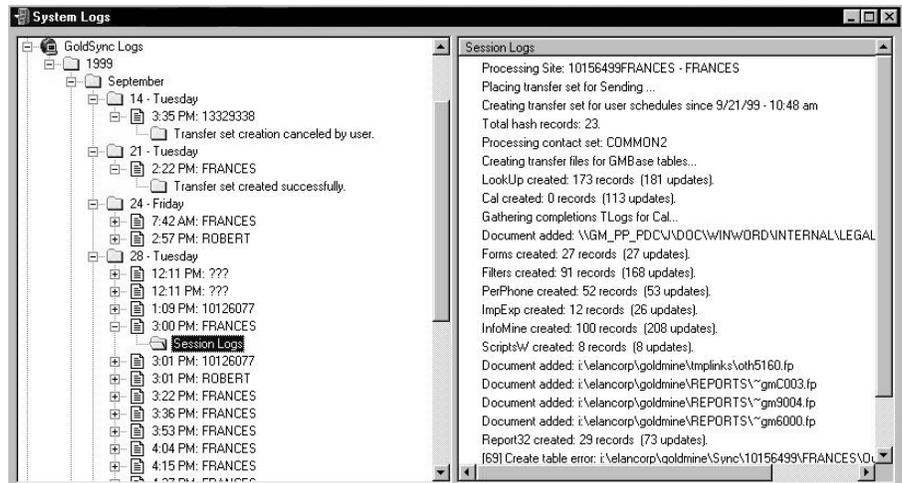
## Viewing the GoldSync Logs

You can display detailed information about each activity that GoldSync executes during a synchronization session.

From the **System Logs** window, *either*:

- Click  next to  GoldSync Logs to display a set of folders
- or*
- To open all folders, highlight , then select **Expand** from the local menu

### Viewing the GoldSync Logs



When done viewing the log entries, you can *either* select another folder or system log, *or* click  to close the **System Logs** window.

## Viewing the Contact Files Logs

You can display the **Contact Files Logs** that contain records from the ContTLog file. This log records all changes made to the contact set files, including:

- CONTACT1.DBF
- CONTACT2.DBF
- CONTHIST.DBF
- CONTGRPS.DBF
- CONTSUPP.DBF

From the **System Logs** window, *either*:

- Click  next to  **Contact Files Logs** to display a set of folders  
*or*
- Highlight  **Contact Files Logs**, then select **Expand** from the local menu to open all folders.

The **Contact Files Logs** display the following information for the selected contact set in the right pane of the **System Logs** window:

**Sync Stamp** Date and time that the record was added to the contact set.

**Log Stamp** Date and time that GoldMine recorded the activity.

**User** User who created or last modified a field in the record.

**Field Name** GoldMine field involved or affected by the activity.

**Current Field Value** Entry in the field identified in **Field Name**.

**RecID** Unique identifier for any records. The first seven characters compose a value that represents the creation time of the record.

**Company** Entry in the **Company** field of the linked contact record, such as a **Calendar** activity's linked contact record.

**Contact** Name entry in the **Contact** field of the linked contact record.

When done viewing the log entries, you can *either* select another folder or system log, *or* click  to close the **System Logs** window.

## Viewing the GoldMine Files Logs

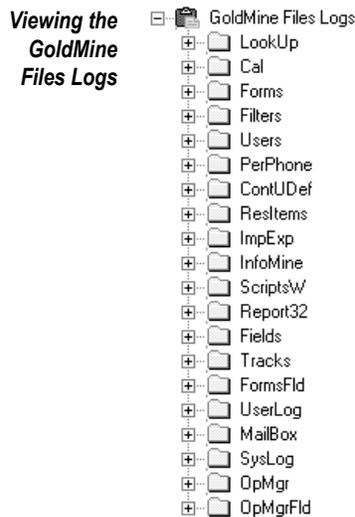
You can view a log that contains records from the GMTLog file from the **GoldMine Files Logs**. This log records all changes made to GoldMine files *except* those recorded in the **Contact Files Logs**.

From the **System Logs** window, *either*:

- Click  next to  GoldMine Files Logs to display a set of folders, as shown in the following figure

*or*

- Highlight  GoldMine Files Logs, then select **Expand** from the local menu to open all folders



Once you select a specific date folder, the **GoldMine Files Logs** display the following information in the right pane of the **System Logs** window:

**Sync Stamp** Date and time that the activity occurred during processing.

**Log Stamp** Date and time that GoldMine recorded the activity.

**User** User who created or last modified a field in the record.

**Field Name** GoldMine field involved or affected by the activity.

**Current Field Value** Entry in the field identified in **Field Name**.

**RecID** Unique identifier for any records. The first seven characters compose a value that represents the creation time of the record.

When done viewing the log entries, you can *either* select another folder or system log, *or* click  to close the **System Logs** window.

### ***Purging Log Entries***

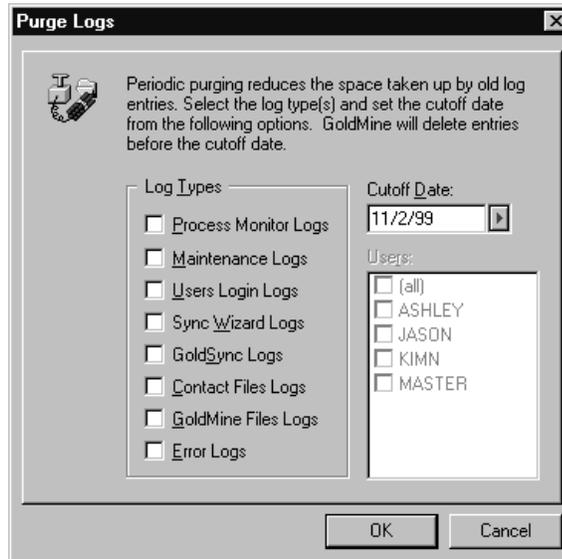
Maintaining logs can consume significant disk space. Purge old logs of old records periodically to reduce the storage space required.

To purge entries from one or more logs, from the Main Menu, select **View|GoldMine Logs**.

Select the log type that you want to purge. For example, if you want to purge the **Contact Files Logs**, select **Contact Files Logs** from the drop-down list. If you want to purge old entries in all logs, you can select any log type.

Right-click to display the local menu in either the left pane or the right pane. Select **Purge Logs**. The **Purge Logs** dialog box appears.

**Purge Logs dialog box**



The **Purge Logs** dialog box contains the following options:

**Log Types** Select one or more of the following log types:

- **Process Monitor Logs**
- **Maintenance Logs**
- **Users Logs**
- **Sync Wizard Logs**
- **GoldSync Logs**
- **Contact Files Logs**
- **GoldMine Files Logs**
- **Error Logs**

**Cutoff Date** Cutoff date for deleting records; that is, GoldMine purges all records created *before* the date entry in this field. To change the date, *either* type a date in the field, *or* click  to display a calendar, from which you can select a date.

**Users** Specifies the user(s) whose log entries will be purged.

When done, select **OK** to start deleting records. During the purge process, GoldSync displays the **GoldMine Process Monitor**. When done, GoldSync closes the **GoldMine Process Monitor**.

# Appendix A: Customizing GoldMine Startup and Settings

You can make changes to GoldMine by defining settings in the **Preferences** window, and also by working outside of the application.



---

For details on the **Preferences** window, see the online Help files.

---

By working outside of GoldMine, you can:

- Define startup characteristics with command line parameters
- Add or modify features by working with custom files

**Command line parameters:** By entering a statement from the command line (DOS prompt or Windows shortcut), you can specify a variety of conditions to occur when GoldMine starts.

**Custom files:** You can create custom files to add or modify GoldMine features. Some GoldMine settings are defined in a special text file known as an *initialization file*, or *.INI file*. The following files can add or change functionality in GoldMine:

**GM.INI** Changes settings for all users working from an installed copy of GoldMine.

**GoldSync.INI** Changes settings for all users working from a GoldSync Master License.

**username.INI** Changes settings for one user working from an installed copy of GoldMine. *Username.INI* – where *username* represents the name entered in the **Username** field of the GoldMine banner display – controls settings for one user that cannot be set from the menus in GoldMine. GoldMine places *username.INI* in the GoldMine directory, or whatever directory in which GoldMine resides.

**Predial.INI** Changes settings for the auto-dialer to recognize different length telephone numbers; for example, local calls to a different area code and long-distance calls.

**Lookup.INI** Updates GoldMine fields based on data in other fields.

**Web data import file** Similar to an .INI file, this file contains contact data captured from a Web site on the Internet, and instructions for how to handle the data.



---

For details on determining where GoldMine resides, see the *GoldMine FrontOffice 2000 Installation Guide*.

---

GoldMine automatically generates some *username.INI* settings. You can add command statements to *username.INI*, or modify existing commands. *Username.INI* organizes commands in a format similar to the following example:

```
[Section]  
Setting=x
```

where the section name always appears in brackets and (*x*) represents the value of the designated setting. Be sure to place each new command in the correct section of *username.INI*. However, the order of statements within a section does not affect proper execution.

You can open the *username*.INI file by using *either* of the following methods:

- From Windows Explorer, double-click on *username*.INI. Windows will start Notepad and open the *username*.INI file.
- From a text editor, such as Notepad, select **File|Open**. The **Open** dialog box appears. In the **Look in** field, select the directory in which you installed GoldMine. In the **Open** field, type *username*.INI; for example, JOHN.INI. To open the file, select **Open**.

This section contains *username*.INI command statements for customizing:

- GoldMine path settings
- Access to macros of another user
- Title bar display
- Sort capabilities for dBASE files
- Menu links to custom help files and other Windows applications
- Modem and dialing settings
- Configurations for messaging activities



---

For best results, make a backup of your .INI file before adding or changing any settings, *and* change *only* settings exactly as described in this appendix. If you need to make changes not discussed in this manual, contact GoldMine Software Technical Support.

---

## **Defining Startup Conditions with Command Line Parameters**

You can define startup conditions for GoldMine by running a command statement with one or more of the following parameters.

<b>Command</b>	<b>Description</b>	<b>Example</b>
u	Automatically enters the specified name in the <b>Username</b> field of GoldMine's banner display	/u:john
p	Automatically enters the specified value in the <b>Password</b> field of GoldMine's banner display	/p:password

Command	Description	Example
s	Silent mode	/s:dde or /s:goldsync
g	GoldDir	/g:c:\goldmine
c	Opens the specified contact file – the example shows the CommonDir contact file	/c:c:\goldmine\common
i	Locale	/i:GML_FRA
m	Runs the specified macro	/m:802
r	Rebuilds the open contact file	/r:1,5

The syntax for the maintenance */r* option includes two numeric parameters. The first parameter indicates the process type. The second parameter indicates which tables to process. Both parameters allow for multiple options and tables by adding the values of all desired options.

**Example**

The following statement rebuilds all contact files and the CAL.DBF file, then quits GoldMine when done passing the following parameters:

```
gmw5 /u:kim /p:pwd /r:36,18
```

The value 36 consists of MFO\_Rebuild (4) and MFO\_LogoutWhenDone (32), which are described below. The second parameter of value 18 processes IO\_CurrContFiles (2) and Cal (16).

The first parameter includes the following options:

Table 6. Command Statement Options (Parameter 1)	Index	1 //	index
	IndexUI	2 //	index w/o status
	Rebuild	4 //	pack and rebuild
	ConvertRecID	16 //	converts to new records
	Minimize	32 //	minimizes GoldMine
	LogoutWhenDone	64 //	exit GoldMine when done
	LogoutAll	128 //	force log out all users before beginning

The second parameter can process the following tables:

Table 7. Command Statement Options (Parameter 2)	IO_GMDirFiles	1 //	GoldMine directory files
	IO_CurrContFiles	2 //	current contact files
	IO_AllContFiles	4 //	all contact files

The following individual file values are available:

<b>Table</b>	<b>Value</b>
LookUp	8
Cal	16
Forms	32
GTLog	64
CTLog	128
Contact1	256
Contact2	512
ContSupp	1024
ContHist	2048
ContGrps	4096
Filters	8192
DataDict	16384
SpFiles	32768
Users	65536
PerPhone	131072
ContUDef	262144
Resource	524288
ImpExp	1048576
InfoMine	2097152
ScriptsW	4194304
Reports	8388608
ViewFields	16777216
APTracks	33554432
FormsFld	67108864
UserLog	134217728
Reports	268435456
MailBox	536870912
ErrorLog	1073741824
SyncLog	2147483648
SyncProc	4294967296
SyncSite	8589934592
SyncTask	17179869184
SyncLock	34359738368
OpMgr	68719476736
OpMgrFld	137438953472
LeadDbfs	274877906944
LeadFile	549755813888

You can include multiple parameters in one command line statement. To run a command with multiple parameters, place a space between each parameter. The following example shows a command that consists of multiple parameters.

**Example**

The following command statement starts GoldMine silently as a DDE server, logs in Dave, then opens the Demo contact file.

```
GMW5.EXE /u:DAVE /p:GB98 /s:DDE /c:c:\goldmine\demo
```

### Loading the Macros of another User

You can load and use macros defined for another user *instead* of your macros.

**[GoldMine]** Place the following setting in the [GoldMine] section of *username.INI*.

```
MacFile=username
```

Loads macros that were defined by or for another user instead of your macros.

**Example**

```
MacFile=Michael
```

will load the macros defined for GoldMine user Michael.

### Disabling Sort Capabilities for dBASE Files

Clicking on column titles in many GoldMine browse windows sorts data alphabetically within the selected field value. The following example shows sorting entries in the **Activity List** by **Date**.

Sorting data by selecting a column heading

Sorting data in a browse window

Date	Time	Dur	Contact	Code	Reference
Jul 28	12:00p	1:00	Julia Fulton	GDW	Team lunch
Jul 29	9:00a	1:00	W. E. Coyote	SLG	Demo walk through
Jul 30	12:00p	2:00	W. E. Coyote		Panel review
Jul 31	8:30a	1:00	Dr. Payne	PER	Dental appt.
Aug 1	11:00a	1:30	W. E. Coyote		Needs analysis presentation
Aug 4	10:30a	40	Robert Stringer		
Aug 5	11:00a	1:00	Robert Stringer		

Sorting data by this method can take a long time unless you either have a small database, or are running GoldMine on an SQL server. If you are working with a relatively large dBASE database, you can avoid lengthy delays by turning off column sort capability.

**[Warning]** Place the following setting in the [Warning] section of *username.INI*.

```
BrowseSort=2
```

Disables column sort capabilities. Adding this command will prevent an unintended delay while GoldMine sorts entries if a user accidentally clicks on a column title.

## Modifying GoldMine Menus

You can customize GoldMine menus to:

- Access custom GoldMine Help files
- Consolidate contact-centered communication operations in the **Contact** menu
- Start other Windows applications while running GoldMine

### Adding Custom Help Files

You can customize the GoldMine **Help** menu to list additional GoldMine-related help files. This feature is controlled by an entry in the *username.INI* file, where *username* is the login name of the GoldMine user whose **Help** menu will be customized.



---

Before adding the command statement to *username.INI* file, be sure to copy the custom help file (extension *.HLP*) into the directory where GoldMine is located; for example, *C:\PROGRAM FILES\GOLDMINE*.

---

**[HelpMenu]** Place the following setting in the [HelpMenu] section of *username.INI*.

```
Opt(x)=&menu text,path\helpfile.hlp
```

Adds an option to the **Help** menu to open a custom help menu for GoldMine.

Each of the italicized variables is described below.

x

represents a custom help menu title number from 1-9. The **H**elp menu can contain up to nine custom menu options. The first option added must be numbered Opt1 and the numbering must continue in ascending sequence; that is, Opt2 must be added before you can add Opt3. GoldMine will not add an option numbered out of consecutive sequence.

*&Menu Text*

Title to appear on the **H**elp menu. You can designate an optional hot-key for the menu command by placing an ampersand (&) in front of the character that you want to use as the hot-key. For example, to assign the key sequence **ALT-L** to the custom menu option **Linking Docs**, type &Linking Docs. The menu option appears with the hot-key letter underlined, that is, the title **Linking Docs** indicates that the hot-key sequence is **ALT-L**.

*path*

Points to the location of the GoldMine directory that contains the custom help file.

**Example**

C:\GOLDMINE\

*helpfile.hlp*

Names the custom help file that GoldMine will open; for example, LINKDOC.HLP.

**Example**

Opt1=&Linking Docs,C:\GoldMine\LINKDOC.HLP

Adds **Linking Docs** to GoldMine's **H**elp menu. Select **HelpLinking Docs** to open the help file LINKDOC.HLP.

## Customizing a Menu to Run Other Applications

You can add a command statement to GoldMine's Main Menu to start other Windows programs while GoldMine is running.

**[FileMenu]** Place the following setting in the [FileMenu] section of *username.INI*.

*Optx=&menu text,path\filename.exe,<DDE command>,y*

Adds an option to the specified menu to start another Windows program and load a file created by that program.

Each of the italicized variables is described on the following page.

*x*

represents a custom menu option number from 1-9. The specified menu can contain up to nine custom menu options. The first option added must be numbered *Opt1* and the numbering must continue in ascending sequence; that is, *Opt2* must be added before you can add *Opt3*. GoldMine will not add an option numbered out of consecutive sequence.

*&menu text*

Title to appear on the specified menu. You can designate an optional hot-key for the menu command by placing an ampersand (&) in front of the character that you want to use as the hot-key. For example, to assign the key sequence **ALT** - **E** to the custom menu option, type &e. For example, to assign the key sequence **ALT** - **E** to the custom menu option **Edit DEMO.DOC**, type &Edit DEMO.DOC. The menu option appears with the hot key letter underlined, that is, the title **Edit DEMO.DOC** indicates that the hot key sequence is **ALT** - **E**.

*path*

Points to the location of the application.

### **Example**

C:\GOLDMINE\

*filename.exe*

Names the application that GoldMine will start when the user selects the custom menu command.

y

Parameter that designates the menu in which the custom command will appear. Select one of the numbers to place the command under the corresponding menu:

- 1 File            3 View            5 Schedule    7 Tools            9 Help  
2 Edit            4 Lookup        6 Complete    8 Window

The following example shows a statement to add a custom command option to GoldMine's **T**ools menu.

**Example**

```
Opt1=R&un app,C:\apps\application.exe,,7
```

Adds the title **R**un app to the top, or first position, of the **T**ools menu. The hot-key is **u**.

## Displaying Curtained Records

You can enable the **Contact Listing** to display the contact's name only for curtained records. GoldMine displays **n/a** for other information, as shown in the following figure.

**Displaying  
curtained  
records**

Company	Contact	Phone1
Acme Products	John Doe	(562)555-1234
Artisoft	Donald Deck	(602)677-0004
AT & T	Karn Smith	(201)661-8000
n/a	Art Bardton	n/a
Blue Cross Blue Shield	Parker Fillman	(214)677-5432
n/a	Bea Dennkow	n/a
Dean Witter	Randall Noel	(808)444-1234

**[GoldMine]** Place the following setting in the **[GoldMine]** section of GM.INI.

```
FindHideCurtained=0
```

Displays the contact's name for curtained records.

## Adjusting Scroll Bar Tracking

You can adjust the maximum range of the scroll bar in browse windows. Increasing the range can improve tracking accuracy when working with larger databases. Conversely, in some situations, you may want to disable tracking.

**[GoldMine]** Place the following setting in the [GoldMine] section of *username.INI*.

`MaxThumbTrack=number of records`

Specifies the range of records that can be scrolled. The default is 1,000 records.

### **Example**

`MaxThumbTrack=5000`

will increase the number of records that can be scrolled to 5,000.

To disable tracking, enter the following command statement:

`MaxThumbTrack=0`

## Changing the Refresh Rate for the Peg Board

You can change the periodic update for the **Peg Board** as follows:

- Change the default update frequency for all users
- Disable periodic updating for all users
- Disable periodic updating for one user

### **Changing the Default Update for All Users**

You can adjust the number of minutes between periodic updates of the **Peg Board**.

**[GoldMine]** Place the following setting in the [GoldMine] section of *GM.INI*:

`PBNotifyFreq=x`

where *x* is the number of minutes.

### **Example**

`PBNotifyFreq=5`

updates the **Peg Board** of *all* users every five minutes.

### **Disabling Periodic Updating for All Users**

You can deactivate periodic updating in the **Peg Board** for *all* users.

**[GoldMine]** Place the following setting in the [GoldMine] section of GM.INI:

```
PBNotifyFreq=0
```

### **Disabling Periodic Updating for One User**

You can deactivate periodic updating in the **Peg Board** for *one* user.

**[GoldMine]** Place the following setting in the [GoldMine] section of *username*.INI:

```
UpdatePegboard=0
```

## **Customizing Alarms**

You can define two settings for alarms in the [GMA] section of *username*.INI:

- Set GoldMine to issue an alarm for certain activities by default
- Select a sound file that will play when alarms appear

### **Turning on Alarms as the Default Setting**

**[GMA]** Place the following setting in the [GMA] section of *username*.INI.

```
OnByDefault=record types
```

sets GoldMine to turn on alarms as the default setting for specified activity record types—see CAL.DBF in “Database Structures” in the online Help.

#### **Example**

```
OnByDefault=AC
```

will turn on alarms for appointments (A) and calls (C) by default.

### ***Playing a Sound during Alarm Display***

**[GMAAlarm]** Place the following setting in the [GMAAlarm] section of *username.INI*.

`PlaySound=filename.WAV`

sets GoldMine to play the specified .WAV sound file when any alarm appears.

### ***Changing the Time Delay for Alerts***

By default, GoldMine displays an alert seven seconds after the user displays a contact record to which an alert has been assigned.

To change the time delay before the alert appears, place the following setting in GM.INI.

`RecAlertSec= number of seconds before alert appears`

### ***Setting Back the Cutoff Time for GoldSync***

You can adjust back the cutoff time for GoldSync to include records in a transfer set.

**[GoldSync]** Place the following setting in the [GoldSync] section of GoldSync.INI.

`COBackupMins=nn`

Where *nn* represents the number of minutes for GoldSync to adjust back the cutoff time before each synchronization. The default is 15 minutes.

#### ***Example***

`COBackupMins=120`

sets GoldSync to set back the cutoff time to 120 minutes, or two hours.

## Customizing Searches and Queries

You can enter settings in *username.INI* that control:

- Searching by telephone numbers using the USA or international format
- Maximum number of records displayed in the **SQL Query** tab of the **Filters and Groups** window.

### Setting the Maximum Number of Records to Display for an SQL Query

You can set the maximum number of records for GoldMine to display for an SQL query. By default GoldMine displays a maximum of 10,000 records.

**[GoldMine]** Place the following setting in the `[GoldMine]` section of *username.INI*.

```
SQLQueryLimit=nnn
```

Where *nnn* represents the maximum number.

### Searching for Records with International Format Phone Numbers

You can disable searching by telephone numbers in the USA format when working with the **Contact Listing**.



---

GoldMine will only use the USA format as the default setting for telephone numbers if the United States has been selected in the Windows 95/98 regional settings.

---

**[FindObj]** Place the following setting in the `[FindObject]` section of *username.INI*.

```
FindUSAPhone=0
```

Disables the default setting in the **Contact Listing** to search for telephone numbers in the USA format.

## Customizing Modem and Dialing Settings

Settings for your modem and dialing preferences are set in Windows Control Panel. However, depending on your hardware and telephone system, you might need to enter special settings to use the modem in your PC to dial a pager. You can enter command statements in *username.INI* to configure modem settings for:

- COM port to which the modem is connected for paging
- Baud rate at which your modem will send and receive data
- Initialization string for the modem
- Bypass modem initialization response (OK) before dialing

You can enter command statements in *username.INI* to configure the dialing settings for:

- Number sequence needed before dialing a telephone number
- Local area code of the user
- Pause interval after dialing a telephone number
- DDE request to dial a telephone number
- Viewing the last number dialed to perform remote synchronization

You can further configure GoldMine with a custom PREDIAL.INI file so that the auto-dialer recognizes different length telephone numbers; for example, local calls, local calls to a different area code, and long-distance calls.

### Modem Settings

**[Modem]** Place the following setting in the [Modem] section of *username.INI* to configure communications *to a pager only*.



---

To work with modem settings for normal dialing and synchronization, see “Defining Modem and Dialing Settings” in the online Help.

---

ComPort=*port number*

Identifies the COM port number from 1–4 to which the modem in your PC is connected.

**Example**

ComPort=1

identifies COM1 as the port to which the modem is connected.

### **Dialing Settings**

**[Modem]** Place any of the following settings in the [Modem] section of *username.INI* to configure communications to a pager.

Pause=*yes/no*

Sets the modem to pause after dialing a telephone number. This is a binary command; that is, this command statement either sets to modem to pause (1) or does not require the modem to pause (0).

**Example**

Pause=0

will not require the modem to pause after dialing a telephone number.

DDEdial=&Dial,*app identifier*,[*dde command("y")*]

&Dial

Places the DDE command in the **Edit|Dial Phone** menu sequence.

*app identifier*

Name of the program that you want to open. This name is an identifier associated with the registration database entry for the program. GoldMine will execute the program specified in the command field of this registration entry.

`[dde command("y")]`

When the specified program starts, GoldMine will attempt to establish a DDE conversation with the program. GoldMine will use the application and topic name from the Open section of the registration entry to establish the conversation. If a conversation can be established, GoldMine will execute a DDE request using the command specified as the DDE item.

**Example**

`DDEdial=&Dial,Dialer,[FileOpen("telephone number")]`

will add the **Dial** option to the **Edit|Dial Pone** menu. When a user selects **Dial**, GoldMine will launch a program with the app identifier Dialer, then GoldMine will pass the DDE command `[FileOpen("telephone number")]`. To determine the correct app identifier and DDE command, contact the developer of your Third Party dialing program.

### Auto-dialer Settings

You can set up GoldMine's auto-dialer to recognize different types of telephone numbers, prefixes, and suffixes by creating an *exception list* in a PREDIAL.INI file. An exception list provides a set of conditions that GoldMine will check when processing telephone numbers formatted for the U.S. For example, you might need to set up your auto-dialer to recognize different types of telephone numbers, such as local and long-distance. Upon finding a match to specified conditions, GoldMine will process telephone numbers according to the formatting entered for the condition.



---

If you use PREDIAL.INI, you must select **Dial numbers as entered** in the **Modem** tab of the **Edit|Preferences** window. For details, see "Defining Modem and Dialing Settings" in the online Help.

---

Using a text editor, such as Notepad, create the file PREDIAL.INI in the same directory as the GoldMine program.

**[City]** Place the `[City]` section at the beginning of the PREDIAL.INI file. Place the following setting in the `[City]` section of PREDIAL.INI.

`city, state=dialing prefix`

Stores the city and telephone number prefix assigned to local calls.

**Example**

[City]  
Cincinnati,OH=0-513  
Springfield,IL=0-513

dials the number as a prefix when GoldMine finds a city match.

**[Prefix]** After checking the [City] section, GoldMine will search the [Prefix] section of PREDIAL.INI. Place the following settings in the [Prefix] section of PREDIAL.INI.

*area code+prefix=dialing prefix*

Determines whether GoldMine will dial a specified number as local or long-distance. The *area code* and *dialing prefix* can each be three digits. A hyphen must be used to separate the *area code* and the *dialing prefix*; for example, 310-454.

Command statements can be entered for GoldMine to treat:

- All telephone numbers in an area code as *(area code)=1-*  
long-distance *except* for a prefix in the *(area code)-(prefix)=*  
specified area code
- All telephone numbers in an area code as *(area code)-x=1-*  
local *except* those prefixes that start with a  
specified number

**Example 1**

805=1-  
805-498=

Sends a 1 - in front of all telephone numbers in the (805) area code except for those numbers with a 498 prefix; that is, 498-xxxx.

**Example 2**

805-4=1-  
805-5=1-

Sends a 1- in front of only those telephone numbers in the (805) area code with a prefix starting with a 4 or 5; that is, both (805)-4xx-xxxx and (805)-5xx-xxxx.

**[Suffix]** After checking the [Prefix] section, GoldMine will search the [Suffix] section of PREDIAL.INI. Place the following settings in the [Suffix] section of PREDIAL.INI.

*area code=dialing suffix*

*or*

*Field=GoldMine field*

*Field value=dialing suffix*

Dials a suffix for all telephone numbers in a specified area code. GoldMine can also search for a *Field=* entry, where *field value* represents a possible value in *GoldMine field*. GoldMine will search the displayed contact record for a match to the suffix string.

**Example 1**

310=,,,1005

Sets GoldMine to pause after dialing for three seconds, then will dial 1005 *only* when dialing the (310) area code.

**Example 2**

Field=contact2->userfdef01

Personal=,,,1501

Sets GoldMine to dial the suffix command *only* if contact2->userfdef01 contains the value *Personal*.

## Working with History Records

You can enter settings in *username.INI* that add:

- History records in GoldMine after sending an MS Outlook message
- Activity code information to the **History** tab

### Displaying Activity Codes in History Tabs

You can add a column for activity codes to **History** tabs throughout GoldMine on a per-user basis.

**[ActvObj]** Place the following setting in the `[ActvObj]` section of *username.ini*.

`ShowHistActvCode=1`

This setting adds the **Code** column to display the activity code associated with a completed activity. The **History** tab display will look similar to the following figure.

**Code** column displays activity codes

**Adding activity codes to the History tab**

Date	User	Activity	Code	Result	Reference
Oct 18, 98	KIM	Form	SLS	FUP	Print 'Will keep in touch ltr
Oct 19, 98	KIM	Email In	DOC		re: User Access
Oct 19, 98	KIM	Email Out	DOC		INI setting
Oct 22, 98	KIM	Email Out	DOC		INI setting
Oct 26, 98	KIM	Email In	DOC		re: INI setting

### **Creating a History Record for MS Outlook**

You can configure GoldMine to create a history record after sending an MS Outlook message.

**[GoldMine]** Place the following setting in the [GoldMine] section of *username.INI*.

```
MSMailHistory=1
```

places a record in the **History** tab indicating that a message was sent using MS Outlook. To prevent GoldMine from creating a history record for the MS Outlook message, place 0 in the command statement instead of 1.

### **Working with Internet Mail Settings**

You can enter command statements in *username.INI* to configure how GoldMine works with attachments, and to specify users for autosending queued e-mail. You can set GoldMine to:

- Attach a signature text file to the end of an Internet e-mail message
- Decode MIME attachments in incoming Internet e-mail messages
- Automatically send queued e-mail for multiple users

### **Adding a Signature to Internet E-mail**

You can configure GoldMine to attach a signature file to all Internet e-mail messages. The signature file is a text file that can contain special information about you, your organization, telephone number, quotations, or any other text.

**[Internet]** Place the following setting in the [Internet] section of *username.INI*.

```
SigFile=filename
```

where *filename* is the path and name of the text file containing your signature information.

## Decoding Encoded MIME Attachments

You can set GoldMine to automatically decode any UU-encoded MIME attachments in incoming Internet e-mail messages.

**[Internet]** Place the following setting in the [Internet] section of *username.INI*.

```
UUEncodeScan=1
```

Automatically decodes UU-encoded MIME attachments in e-mail messages retrieved from the Internet.

## Assigning Users for Queued E-mail

You can configure GoldMine to simultaneously send queued messages for multiple users. When GoldMine auto-retrieves and sends messages for the user with the following .INI setting, queued messages are also sent for the specified users.

**[Internet]** Place the following setting in the [Internet] section of *username.INI*. In this case, the user is the individual that you want to drive the process of autosending e-mail for all assigned users; that is, GoldMine automatically sends the queued e-mail for the assigned users after sending the e-mail for the user with this .INI setting.



---

For this operation to work automatically, you must select *both* of the following settings from the **Internet Preferences** window:

- **Auto-retrieve** from the **Accounts** tab
- **Send queued messages** from the **Retrieval** tab

If you do not activate these settings, GoldMine will send messages for the assigned users only when you select **Send queued messages**.

---

```
SendQueueFor=user1;user2
```

where *user<sub>x</sub>* is the name of the user you want to “sign up” for autosending queued e-mail at the time that the user with the .INI settings auto-retrieves and sends queued messages. Each username entry must be separated by a semicolon (;).

**Example**

JOHN.INI contains the following setting:

```
SendQueueFor=ALAN;JULIA
```

After retrieving and sending JOHN’s messages, GoldMine sends messages queued by ALAN and JULIA.



---

You can find details in the online Help for the following **Internet Preferences** settings:

- **Auto-retrieve** from the **Accounts** tab: see “Adding Internet Accounts to GoldMine”
  - **Send queued messages** from the **Retrieval** tab: see “Defining Settings for Retrieving E-mail from the Internet”
-

## Net-Updating via FTP Proxy

You can configure GoldMine to work through a File Transfer Protocol (FTP) proxy to download updates from the Net-Update server. For details about using Net-Update, see "Updating your Copy of GoldMine" on page 274.

**[NetUpdate]** Place the following settings in the [NetUpdate] section of *username.INI*.

```
UseProxy=1  
ProxyInfo=ftp://FTP proxy address:proxy port
```

GoldMine takes the proxy settings for HTTP/HTTPS from the Internet settings already entered on your system; these are the same settings used by Internet Explorer and Outlook Express.

### **Example**

If your FTP proxy is at the address 123.456.0.1 and uses port 1234, the .INI entries are the following:

```
UseProxy=1  
ProxyInfo=ftp://123.45.0.1:1234
```

## Customizing Synchronization Settings

You can define settings in *username.INI* to change the location in which GoldMine places files during remote synchronization. This section contains settings to designate the location for the following file types:

- Linked documents received during remote synchronization.
- Transfer sets received during remote synchronization.

You can also configure GoldMine to prompt you whenever a transfer set is retrieved so that you can decide whether or not to overwrite an old transfer set.

### **Adding a Path for GoldSync to Find Linked Documents**

If you want to specify additional drives for GoldMine to search for linked documents retrieved with a transfer set, you can add drive(s) in GoldSync.INI to point to the new location(s).

**[LDRetrieval]** Place the following setting in the [LDRetrieval] section of GoldSync.INI.

`ALTDrives=drive letter designations`

Points to one or more drives that GoldMine will check when searching for a path to place linked documents when performing synchronization.

#### **Example**

`ALTDrives=C;D;E`

### **Saving Old Transfer Sets**

You can configure GoldMine to display a prompt when retrieving a transfer set that allows you to decide whether to overwrite an old transfer set or save the old transfer set with another name. By default, GoldMine overwrites the old transfer set.

**[Internet]** Place the following setting in the [Internet] section of *username*.INI.

`KeepOldTransfers=1`

Sets GoldMine to prompt you regarding the disposal of an old transfer set when a new transfer set is retrieved.

## Defining Field Values for use with External Applications

You can store custom data to be retrieved into files created by applications that are linked via DDE to GoldMine.

You can define field values to apply to all GoldMine users, a specified user, or the currently logged user. To determine which users will be affected, place the command statement in the .INI file shown on the following page:

**GM.INI** Assigns the field value globally; that is, to all GoldMine users.

**username.INI** Assigns the field value to one user. For example, placing the command statement in JOHN.INI assigns the value to only the user John.

To define field values to the specified user(s), enter the following statement.

**[user\_var]** Place the following setting in the [user\_var] section of the appropriate .INI file.

*field name=field value*

Each of the variables is described below.

*field name*

Specifies the field that contains the value to be inserted.

*field value*

Specifies the *field name* entry to be inserted.

### **Example 1**

The following GM.INI entries define field values to be inserted for all GoldMine users.

```
[user_var]
Division=Printing Systems
FAX=(310)555-1212
Locale=Southern California
Pager=(310)555-2222
```

### **Example 2**

The following *username*.INI entries define field values to be inserted for *only* John.

```
[user_var]
Territory=South Bay
SSN=123-45-6789
```

Once field values have been defined as shown in the above example, the `&user_var` macro can be used to merge the field values using an external application, such as Word. For example, you can insert “South Bay” into your template by including the `Territory=South Bay` command under `[user_var]`.

## **Updating GoldMine Fields**

You can define conditions to update GoldMine field data based on data in other fields in a LOOKUP.INI file. You can set GoldMine to update:

- Automatically when contact records are created
- Automatically when data is entered in one or more specified fields
- When triggered as an Automated Process event

You can also configure GoldMine to launch an external application when records are added or edited.

Each section in LOOKUP.INI contains instructions for one field that you want GoldMine to update. For example, the `[City]` section will contain update instructions for the **City** field. The section can contain three types of instructions:

- Lookup instructions
- Results of the process and updated values
- Optional settings

## Defining Lookup Instructions

**[Field Name]** Place the following settings in the *[Field Name]* section of LOOKUP.INI.

```
Lookupx=field name  
field value=replace value
```

Each of the variables is described on the facing page.

*Lookupx=field name*

Specifies the instruction number, and the field to examine when comparing field values to perform the update.

*field value*

Specifies the value that GoldMine will use as the match criterion when examining the field specified in the *field name* entry described above.

*replace value*

Specifies the value that GoldMine will enter in *[field name]* when a match is found.

Multiple field values can be listed below *Lookupx=field name*. When GoldMine finds one of the match criteria, *[field name]* will be updated as specified in *field value=replace value*.

For example:

```
[uSalesRep]  
Lookup1=State  
CA=John Doe  
NY=Chris Jones  
Otherwise=Jim Short  
Overwrite=1
```

In the above example, [uSalesRep] specifies that GoldMine will update the **SalesRep** field. Lookup1=State sets GoldMine to perform the lookup based on values in the **State** field. GoldMine will update the **SalesRep** field with John Doe in all records with a **State** entry of CA; GoldMine will update **SalesRep** to Chris Jones in all records with a **State** entry of NY. The condition Otherwise=Jim Short will update the **SalesRep** field with Jim Short in all records with any **State** entry other than CA or NY.

By default, GoldMine will update only fields that contain no value (that is, fields that are empty). To set GoldMine to update all fields, whether or not they contain data, include the command Overwrite=1.

### **Using dBASE Expressions**

To create Lookup instructions with the greatest flexibility, you can use dBASE expressions for both Lookup values and the result values. dBASE expressions must start with an ampersand (&).

For example:

```
[uSalesRep]
Lookup1=&substr(contact1->phone1,2,3)
310=Jon Doe
212=Chris Jones
714=&contact1->key1
```

Updates the **SalesRep** field with the entry John Doe in records in which the **Phone1** entry has an area code of 310. GoldMine will update **SalesRep** to Chris Jones in records in which the **Phone1** entry has an area code of 212. GoldMine will update **SalesRep** with the value in the **Key1** field in records in which the **Phone1** entry has an area code of 714.

## Setting up Multiple Lookup Expressions

You can use multiple Lookup expressions within a section. Multiple Lookup expressions allow GoldMine to continue looking for matching entries when the first-listed expression(s) do not locate a match. In multiple Lookup expressions, the number placed after Lookup—such as Lookup1, Lookup2, etc.—indicates the order in which GoldMine will perform the search.

### Example 1

```
[uSalesRep]
Lookup1=&substr(contact1->phone1,2,3)
Lookup2=state
310=John Doe
212=Chris Jones
619=Jenny Smith
CA=Bob Martinez
Otherwise=&UserFullName
```

The expressions shown in Example 1 first update the **SalesRep** field based on listed values in the **Phone1** field. For records in which no match is found, GoldMine will look for a match in the **State** field; in those records in which the **State** entry is CA, GoldMine will update the **SalesRep** field with Bob Martinez. For records that do not match the two Lookup conditions, the condition `Otherwise=&UserFullName` will update the **SalesRep** field with the full name of the currently logged user.

### Example 2

```
[uSalesRep]
Lookup1=left(contact1->zip,3)
902=Tom
903=Dick
904=Harry

Lookup2=left(contact1->zip,1)
9=Tom
Otherwise=n/a
Overwrite=1
```

first updates the **SalesRep** field based on ZIP Code entries. GoldMine will update the **SalesRep** field with the entry Tom in records with a **Zip** field entry that starts with 902; GoldMine will update **SalesRep** with Dick in records with a **Zip** field entry that starts with 903. GoldMine will update **SalesRep** with Harry in records with a **Zip** field entry that starts with 904.

For records that do not have values that match the above three criteria, GoldMine will update records based on the first digit in the **Zip** field. In records in which the first digit in the **Zip** field is 9, GoldMine will update the **SalesRep** field with Tom. In records that do not have values that match the two Lookup conditions, the condition `Otherwise=n/a` will update the **SalesRep** field with n/a.

The command `Overwrite=1` sets GoldMine to update *all* fields, whether or not they contain data.

### **Performing Field Updates Automatically**

You can configure GoldMine to update fields automatically when a user either:

- Creates a contact record
- Enters data in specified fields by including the `[AutoUpdate]` section in LOOKUP.INI

#### **Updating Fields upon Record Creation**

You can configure GoldMine to update one or more fields automatically when a user creates a contact record by including the following statement in the `[AutoUpdate]` section in LOOKUP.INI.

**[Auto-Update]** Place the following setting in the `[AutoUpdate]` section of LOOKUP.INI.

```
NewRecord=field(s)
```

updates the *field* when a user creates a contact record.

#### **Example 1**

```
[AutoUpdate]  
NewRecord=Key1
```

Updates the **Key1** field whenever a contact record is created. To specify the value to appear in the **Key1** field, add a `[Key1]` section to LOOKUP.INI.

#### **Example 2**

```
[Key1]  
Lookup1=&username  
JDOE=John Doe
```

Places the full name of user JDOE in the **Key1** field.

### **Example 3**

```
[Urep]
Lookup1=State
CA=Jon
NY=Mike
Otherwise=Mark
```

updates the **Rep** field in every new contact record with Jon when the **State** entry is CA, with Mike when the **State** entry is NY, and with Mark for any other **State** entry.

### **Updating Fields upon Data Entry**

You can configure GoldMine to update fields automatically when a user enters data in specified fields by including the [AutoUpdate] section in LOOKUP.INI.

**[Auto-Update]** Place the following setting(s) in the [AutoUpdate] section of LOOKUP.INI.

```
field a=field b
```

Updates *field b* when a user types a value in *field a*.

For example:

```
[AutoUpdate]
State=uSalesRep
Zip=Key5
```

updates the **SalesRep** field as soon as a user types a value in the **State** field, and updates the **Key5** field as soon as a user types a value in the **Zip** field.

You can set GoldMine to update multiple fields when a user types a value in one field.

### **Example**

```
[AutoUpdate]
State=uSalesRep,Key1
```

updates both the **SalesRep** field and the **Key1** field when a user types a value in the **State** field.

### **Defining Field Updates as an Automated Process**

You can configure GoldMine to update fields as specified in an Automated Process. You can set up updates to multiple fields by immediately triggering subsequent events to cause a “chain effect” of updating fields based on data that GoldMine looked up in previous events.

## **Launching External Applications when Records are Created and Edited**

When records are added and edited in GoldMine, you can automatically launch external applications to enable further processing once the data is updated in GoldMine. You can add commands to two sections of LOOKUP.INI to work with external applications:

- [OnNewRun] allows you to set up external applications for each type of contact-related record.
- [OnEditRun] launches applications when a record is changed.

The [OnNewRun] and [OnEditRun] sections can launch external applications based on additions of or changes in records in the following GoldMine files: Contact1, Contact2, Cal, ContHist, and ContSupp. In addition, specific record types in Cal, ContHist, and ContSupp can be set up to launch applications.

The following example shows how to set up [OnNewRun]:

```
[OnNewRun]
Cal-S=SaleCApp.exe
Cal-C=CallCApp.exe
Cal=CalApp.exe

ContHist-S=SaleHApp.exe
ContHist-CI=InCallHApp.exe
ContHist=HistApp.exe

ContSupp-P=ProfileApp.exe
Contact1=NewContact.exe

Otherwise=AnyApp.exe
AppendRecNo=1
DisableFromAP=1
```

Entries under [OnNewRun] and [OnEdtRun] can be specified for each contact-related record and record type. For the specified table, GoldMine first checks for a specific RecType entry, and then for a general table entry that is not suffixed with a RecType. For example, when a sale is completed, GoldMine first checks for an entry named ContHist-S=. If ContHist-S= does not exist, GoldMine checks for the general ContHist= entry. If a general ContHist= entry does not exist, GoldMine checks for the Otherwise= "catch-all" entry. In the above example, GoldMine launches ProfileApp.exe if a new profile is added.

The AppendRecNo=1 entry instructs GoldMine to append the RecNo of the new record to the command line, so the completed incoming call from the above example will launch a command like InCallApp.exe 1234 (where

1234 is the record number of the completed record in the ContHist file). Use this setting to send a DDE command to GoldMine to query the new record's data.

The DisableFromAP=1 entry instructs GoldMine to disable the [OnNewRun] options if an activity is processed by Automated Processes.

The Otherwise= entry is suffixed with the File+RecType, like AnyApp Cal-A 1234.

When a contact record is created and the [AutoUpdate] NewRecord option is specified, the NewRecord option is executed first so that its updates could be used by a subsequent [OnNewRun] Contact1=NewContact.exe entry.

### **Example of a LOOKUP.INI File**

The following example shows a complete LOOKUP.INI file:

```
[AutoUpdate]
NewRecord=Key1
State=uSalesRep, Key1
Zip=Key5

[uSalesRep]
Lookup1=&substr(contact1->phone1,2,3)
Lookup2=state
310=Jon Doe
212=Chris Jones
619=Jenny
CA=Chris Jones
Otherwise=&UserName
Overwrite=1

[Key1]
lookup1=&username
JD0E=John Doe

[Key5]
Lookup1=&left(contact1->zip,3)
902=East
903=West
904=South

Lookup2=&left(contact1->zip,1)
9=Nowhere
```

```

Otherwise=n/a
Overwrite=1
[OnNewRun]
Cal=CalApp.exe
ContHist-S=SaleHApp.exe
ContSupp-P=ProfileApp.exe
Contact1=NewContact.exe

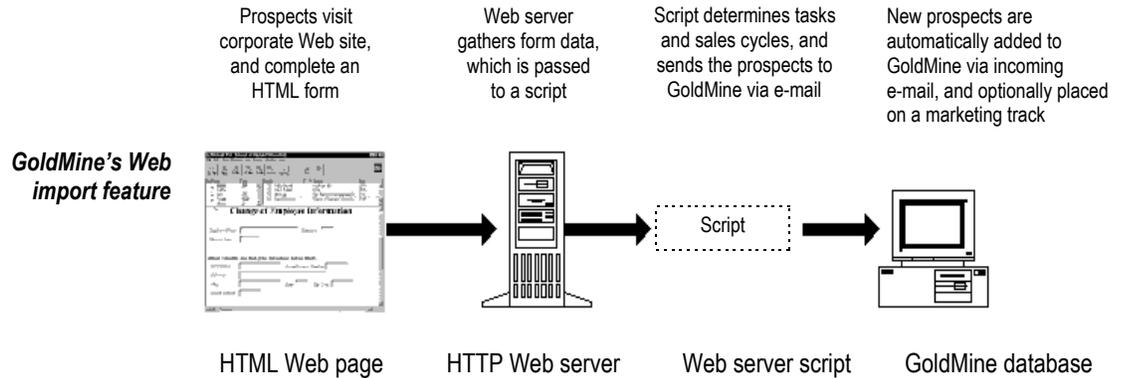
```

## Capturing Web Data

GoldMine users can set up pages on the World Wide Web to collect a variety of contact information from interested visitors. To use the data in GoldMine, you must create a Web import file that includes instructions for how to handle the data. GoldMine's Web import functionality requires a specifically formatted incoming e-mail message that contains the desired Web import instructions. You can use a variety of methods to create this message, including CGI, Perl, ASP, ISAPI, etc. For a sample Perl script, see "Creating the Script" on page 335.

Once the information is submitted, a Web server script can format the data into an Internet e-mail message, which can then be sent to a designated recipient. When retrieving the e-mail message, GoldMine will recognize the import instructions, and create a contact record with all the data captured from the Web page.

Combining the Web import feature with GoldMine's Automated Processes can completely automate capturing and responding to leads. Automated Processes can be initiated automatically, and e-mail messages can be sent to GoldMine users alerting them of the incoming contact data.



You do not need a high level of gateway script knowledge to implement the GoldMine Web import feature. The simplest way to begin would be to contact your Web administrator and provide him with the sample HTML and Perl script. The Web administrator will know how to integrate the HTML and Perl script into your existing Web site. Writing and modifying scripts requires some programming expertise that is not covered in this material. There are many sources for getting started with CGI scripts available on the Internet, and in bookstores.



---

GoldMine Software technical support cannot provide support for creating or maintaining HTML code or CGI scripts.

---

### **Setting up the Web Import Files**

GoldMine's Web Import Gateway consists of three components:

- Web form
- Web server script
- GoldMine's Internet e-mail reader

To work with GoldMine's sample Perl script, you must work with two files that need to be modified to fit the conventions of your Web server:

- WEBIMPORT.HTML\*
- WEBIMPORT.PL (Perl script)\*

Place WEBIMPORT.HTML in the directory where you maintain your HTML files. You will need to modify the HTML file to specify the directory location of the Common Gateway Interface (CGI) directory on your server.

Place WEBIMPORT.PL in the CGI directory.



---

CGI/Perl scripts are not kept in the same place on all servers. If you are unsure where to place WEBIMPORT.PL, ask the Webmaster.

---

---

\* You can change the file name(s) WEBIMPORT.HTML and/or WEBIMPORT.PL, but you must update any references to these file names in the Web form and/or CGI script.

The following example is the HTML call to the CGI script based on our server setup, and makes the following assumptions:

- CGI directory is located under the main HTML directory
- Perl script's name is GMWEB2.PL

```
<FORM METHOD=POST  
ACTION="http://www.goldmine.com/cgi/gmweb2.pl">
```

### **Creating the Web Form**

The Web form is an HTML document that collects information. The Web form allows users to enter text, and make choices from check boxes, radio buttons, and selection lists. You can design forms that meet your own requirements by combining these input types. A sample HTML form is shown below. This form may be used as is or modified. Note that the name of the fields in your form must be the same as the names used in GoldMine's databases. For the field names, see "Database Structures" in the online Help.

#### **Example of an HTML Form**

The following example shows an HTML file using a form:

```
<!--The following is an example of an HTML file using a form-->
```

```
<HTML>  
<HEAD><TITLE>GoldMine Software Corporation - Online  
Registration</TITLE></HEAD>  
<BODY BGCOLOR="#008080" Text="#FFFFFF" LINK="#000000"  
VLINK="#FF8900">  
<BASEFONT SIZE=3>  
  
<!--This is where the table layout begins-->  
<TABLE BORDER=3>  
<TR>  
  <TD><FONT SIZE=+3>GoldMine Software Corporation</FONT></TD>  
</TR>  
<TR>  
  <TD><FONT SIZE=+2>Online Registration Form</FONT></TD>  
</TR>  
</TABLE>  
<!--This is where the table layout ends-->
```

<P>

<B>

<CENTER>To register your copy of GoldMine, please fill out the following form.</CENTER>

<CENTER>Your registration number is located on the registration card and the first page of the GoldMine manual.</CENTER>

<HR>

<!-----This is where the form layout begins----->

<!-----The line below references the PERL script----->

<FORM METHOD=POST  
ACTION="http://www.goldmine.com/cgi/webimp.pl">

<!-----The line below references an HTML page, created separately, that will appear once the message has been sent---->

<INPUT TYPE="hidden" Name="thankURL" value="thankyou.htm">

<!-----Replace "yourname@yourname.com" in the line below with the E-Mail address where you want to receive the results of this form----->

<INPUT TYPE="hidden" NAME="email\_to"  
value="yourname@yourdomain.com">

<DT>GoldMine Serial Number

<DD>

<INPUT NAME="cs1\_Rectype" TYPE="hidden" VALUE="P">  
<INPUT NAME="cs1\_Contact" TYPE="hidden" VALUE="Serial Number">  
<INPUT NAME="cs1\_ContSupRef" TYPE="text" SIZE="15"  
MAXLENGTH="15">

<BR>

<DT>Number of Licenses

<SELECT NAME="Key1">  
<OPTION VALUE="Gold 01/Single User">Single User  
<OPTION VALUE="Gold 05 Net">5 User Network  
<OPTION VALUE="Gold 10 Net">10 User Network  
<OPTION VALUE="Gold 10-25 Net">10 - 25 User Network  
<OPTION VALUE="Gold 25-50 Net">25 - 50 User Network  
<OPTION VALUE="Gold 51+ Net">51+ User Network

```

        <OPTION VALUE="Gold Net Unknown">Not Sure
        <OPTION SELECTED>Choose One
    </SELECT>

<P>

<DT>Date of Purchase

    <INPUT NAME="cs1_Country" TYPE="text" SIZE="35" MAXLENGTH="35"
    VALUE="MM/DD/YY">

<P>

<DT>Place of Purchase

    <INPUT NAME="cs2_Rectype" TYPE="hidden" VALUE="P">
    <INPUT NAME="cs2_Contact" TYPE="hidden" VALUE="Place of
    Purchase">
    <INPUT NAME="cs2_ContSupRef" TYPE="text" SIZE="35"
    MAXLENGTH="35" VALUE="">

<HR>

Ms. <INPUT TYPE="radio" NAME="Dear" VALUE="Ms.">
Mr. <INPUT TYPE="radio" NAME="Dear" VALUE="Mr.">

<DT>Name

<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="CONTACT">

<DT>Title

<DD><INPUT SIZE="30" MAXLENGTH="30" NAME="TITLE">

<DT>Company Name

<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="COMPANY">

<DT>E-Mail Address

<DD>
    <INPUT NAME="cs3_Rectype" TYPE="hidden" VALUE="P">
    <INPUT NAME="cs3_Contact" TYPE="hidden" VALUE="Internet
    Address">
    <INPUT NAME="cs3_ContSupRef" TYPE="text" SIZE="30"
    MAXLENGTH="30">

<DT>Address1

```

```

<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="Address1">
<DT>Address2
<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="Address2">
<DT>City
<DD><INPUT SIZE="26" MAXLENGTH="26" NAME="City">
<DT>State/Province
<DD><INPUT SIZE="3" MAXLENGTH="3" NAME="State">
<DT>Country
<DD><INPUT SIZE="20" MAXLENGTH="20" NAME="Country">
<DT>Zip/Postal Code
<DD><INPUT SIZE="10" MAXLENGTH="10" NAME="Zip">
<DT>Telephone Number (WITH AREA CODE)
<DD><INPUT SIZE="30" MAXLENGTH="30" NAME="Phone1"
VALUE="(xxx)xxx-xxxx">
<DT>Fax Number (WITH AREA CODE)
<DD><INPUT SIZE="30" MAXLENGTH="30" NAME="Fax" VALUE="(xxx)xxx-
xxxx">
<HR>
<DT>Contact Manager/PIM, if any, prior to purchasing GoldMine
<SELECT NAME="userdef05">
  <OPTION VALUE="ACT!">Act!
  <OPTION VALUE="Maximizer">Maximizer
  <OPTION VALUE="TeleMagic">TeleMagic
  <OPTION VALUE="Janna Contact">Janna Contact
  <OPTION VALUE="Ecco">Ecco
  <OPTION VALUE="Lotus Organizer">Lotus Organizer
  <OPTION VALUE="Other">Other
  <OPTION SELECTED>Choose One
</SELECT>
<P>

```

Computer Type:<BR>  
<INPUT TYPE="radio" NAME="cs5\_ContSupRef" VALUE="Desktop">  
Desktop  
<INPUT TYPE="radio" NAME="cs5\_ContSupRef"  
VALUE="Laptop/Notebook"> Laptop/Notebook  
<INPUT TYPE="radio" NAME="cs5\_ContSupRef" VALUE="Desktop &  
Laptop/Notebook"> Both  
    <INPUT NAME="cs5\_Rectype" TYPE="hidden" VALUE="P">  
    <INPUT NAME="cs5\_Contact" TYPE="hidden" VALUE="Computer Type">  
<P>

<DT>Network Operating System

<SELECT NAME="userdef07">  
    <OPTION VALUE="LAN Man">LAN Manager  
    <OPTION VALUE="Novell">Novell  
    <OPTION VALUE="OS/2">OS/2  
    <OPTION VALUE="Pathworks">Pathworks  
    <OPTION VALUE="Win4WrkGrp">Windows 3.11 for Workgroups  
    <OPTION VALUE="Windows 95">Window 95  
    <OPTION VALUE="Windows NT">Windows NT  
    <OPTION VALUE="Windows NT 4.0">Windows NT 4.0  
    <OPTION VALUE="Other">Other  
    <OPTION SELECTED>Choose One  
</SELECT>

<P>

Primary Business at your company:

<SELECT NAME="Key3">  
    <OPTION VALUE="Advertising">Advertising  
  
    <OPTION VALUE="Real Estate">Real Estate  
    <OPTION VALUE="Banking/Finance">Banking/Finance  
    <OPTION VALUE="Medical">Medical  
    <OPTION VALUE="Telecommunications">Telecommunications  
    <OPTION VALUE="Government">Government  
    <OPTION VALUE="Aerospace">Aerospace  
    <OPTION VALUE="Insurance">Insurance  
    <OPTION VALUE="Computer">Computer  
    <OPTION VALUE="Manufacturing">Manufacturing  
    <OPTION VALUE="Legal">Legal  
    <OPTION VALUE="Entertainment">Entertainment  
    <OPTION VALUE="Electronics">Electronics  
    <OPTION VALUE="Other">Other

```

        <OPTION SELECTED>Choose One
    </SELECT>
<P>
<DT>Where did you learn about GoldMine?

<SELECT NAME="Source">
    <OPTION VALUE="Advertising">Advertising
    <OPTION VALUE="Acquaintance">Acquaintance

    <OPTION VALUE="Demo Disk">Demo Disk
    <OPTION VALUE="Trade Show">Trade Show
    <OPTION VALUE="Magazine Review">Magazine Review
    <OPTION VALUE="Reseller">Reseller
    <OPTION VALUE="Literature">Literature
    <OPTION VALUE="Other">Other
    <OPTION SELECTED>Choose One
</SELECT>
<P>

<DT>Comments

<TEXTAREA NAME="Notes" ROWS=4 COLS=72></TEXTAREA>

<P>

</DL>

<INPUT TYPE="submit" VALUE="Register">
<INPUT TYPE="reset" VALUE="Reset Form">
</FORM>
<!-----This is where the form layout ends----->

<B>

</BODY>
</HTML>

```

## How Forms Work

A Web form works in conjunction with a script on a server to process the submitted information. When a person fills out a form and presses the submit button, the browser sends (or posts) the information in the form to the script or application running on the server for processing. The script processes the information passed from the browser to the server. The processed information can be sent back to the server, or, as with GoldMine's Web import feature, sent via e-mail to a designated recipient.

## Creating the Script

The Common Gateway Interface (CGI) is the specified standard for communication between HTTP servers (Web servers) and server-side gateway programs. The CGI specifications define how data is passed from the server to gateway programs, and vice versa.

Gateway programs can be compiled programs written in languages such as C, C++, or Pascal, or they can be executable scripts written in languages such as Perl, TCL, ASP, and other various shell programs. In fact, most gateway programs are Perl scripts, since they are easy to write and modify, and are transportable from machine to machine. The sample gateway script for the GoldMine Web import included in this section is a Perl script.\*



The following sample Perl gateway script shows the special header information:

Content-Type: application/x-gm-impdata

When an e-mail message containing Web Import information is read in, GoldMine automatically handles the message. If problems occur with the x-gm-impdata entry, an incoming message can also trigger the Web import with the following **To:** line entry:

```
{ $GM-WebImport$ }
```

---

---

\* A sample ASP script is available in the Customer Support Files Library section of the GoldMine Web site, which is located at <http://www.goldmine.com>.

### Sample Perl Gateway Script

```
#!/usr/local/bin/perl
# check for the POST method
if ($ENV{'REQUEST_METHOD'} eq 'POST')

{
    # How many bytes are we supposed to receive?
    read(STDIN, $buffer, $ENV{'CONTENT_LENGTH'});
    # make a list of keyword/value pairs
    @pairs = split(/&/, $buffer);
    # cycle through each pair and decipher the values
    foreach $pair (@pairs)

    {
        # get the name/value pair strings
        ($name, $value) = split(/=/, $pair);
        # translate "+" to a space
        $value =~ tr/+/ /;
        # decipher ASCII hexadecimal escaped characters, if any
        $value =~ s/%([a-fA-F0-9][a-fA-F0-9])/pack("C", hex($1))/eg;
        # find profile/contsupp field names that begin with cs*_
        if ($name =~ /cs\d_/)
            #add the profile/contsupp pair to a list keyed on the name of
            the variable
            {$csarry{$name} = $value;}
        else {
            #add the basic field data pair to a list keyed on the name of
            the variable
            $contents{$name} = $value;
        }
    }
}

($mon,$day,$year) = split(m|/|,`/bin/date +%B/%e/%Y`);
$date = "$mon $day, $year";
$to = $contents{'email_to'};
&mailto;
&thankyou;
```

```

#####
## subroutines from here on down!
#####

sub thankyou {
print "Location: http://www.goldmine.com/thankyou.htm\n\n";
exit;
}

sub mailto {
open (MAIL, "|/usr/lib/sendmail -t") || die "can't open pipe to
sendmail \n";
print MAIL "Content-Type: application/x-gm-impdata\n";
print MAIL "To: $to\n";
print MAIL "From: $csarry{'cs2_ContSupRef'}\n";
print MAIL "Subject: datafromgoldform.pl\n";
print MAIL "\n\n";
print MAIL "\[Instructions\]\n";
print MAIL "SaveThis=Web Import File\n";
print MAIL "DupCheck1=Contact\n";
print MAIL "\n";
print MAIL "OnNewSendEmail=Bart,NEW,Prospect requesting
information \n";
print MAIL "OnDupSendEmail=Natalie,,Duplicate Record \n";
print MAIL "\n";
print MAIL "OnNewAttachTrack=WEB Lead\n";
print MAIL "\n";
# The following is an example of testing a field for a value
#print MAIL "Below a message will be printed if the CITY is
Torrance\n\n";
if ($contents{CITY} eq "Torrance") {
    print MAIL "OnAnySendEmail=Jon,WCC,This one is from
Torrance\n";
}
print MAIL "\n";
#print MAIL "Run=c:\goldmine\webimp.exe\n";
print MAIL "\n";
print MAIL "\n";
print MAIL "\[Data\]\n";
# print out general fields and values
foreach $name (sort keys %contents) {
    next if $contents{$name} eq "";
    print MAIL "$name = $contents{$name}\n";
}
}

```

```

print MAIL "\n";
print MAIL "\[ContSupp\]\n";

# print out profile/contsupp fields and values
foreach $name (sort keys %csarry) {
    next if $csarry{$name} eq "";
    print MAIL "$name = $csarry{$name}\n";
}
print MAIL "\n";
print MAIL "\n";

print MAIL "\n";
print MAIL "\n\n";
close (MAIL);
}

```

### ***Importing Contacts into GoldMine***

GoldMine's Internet e-mail reader identifies data retrieved from the Web Import Gateway. GoldMine looks at the header of every e-mail message for special handling instructions. The following example shows the special header information.

```
Content-Type: application/x-gm-impdata
```

When an e-mail message containing Web import information is read in, GoldMine automatically handles the message. Alternatively, an incoming message can trigger the Web import with the following **To:** line entry:

```
{ $GM-WebImports }
```

### ***Formatting the Web Import File***

The incoming import file contains the contact data and instructions. This file must conform to a specific format, similar to .INI files. The import file consists of three major sections:

- [Instructions]
- [Data]
- [ContSupp]

[Instructions] Defines the import instructions. These instructions allow duplicate checking, sending e-mail messages to GoldMine users, attaching Automated Processes, and running external applications to further process the incoming contact data.

GoldMine can check if the contact already exists by considering the DupCheck# instructions. The first duplicate checking instruction must be based on one of the indexed fields, **Contact, Company, Phone1, City, State, Country, Zip, AccountNo, Key1, Key2, Key3, Key4, or Key5**. Additional DupCheck# instructions can be specified to test more than one field to determine if the incoming contact data is a duplicate. Duplicate checking can also be performed based on ContSupp data by specifying the ContSupp record prefix; for example, cs1. When GoldMine determines that a record is a duplicate, but the contact name does not match the existing name, an additional contact is created with the incoming data under the existing contact record. GoldMine will also add ContSupp records that do not already exist.

E-mail messages can be sent to GoldMine users alerting them of the newly created contact records. A separate e-mail message can be sent based on whether the contact is new [OnNewSendEmail=], or if the contact already exists on file [OnDupSendEmail=]. You must designate a user as the message recipient, followed by an optional activity code, followed by an optional reference. Multiple e-mail messages can be sent by appending consecutive numbers to the send e-mail instruction; for example, OnNewSendEmail1=, OnNewSendEmail2=, etc.

Automated Processes can be attached to the contact to initiate an automated response. Letters, faxes, e-mail, and other activities can be initiated to completely automate responding to the captured leads. A separate Automated Process can be attached based on whether the contact is new [OnNewAttachTrack=], or if the contact already exists on file [OnDupAttachTrack=]. You must specify the track name, followed by an optional attaching user. For faster processing, you can also specify the internal track number instead of the track name. Multiple Automated Processes can be attached by appending consecutive numbers to the attach track instruction; for example, OnNewAttachTrack1=, OnNewAttachTrack2=, etc.

To launch an external application for further processing of the incoming data, use the Run=<exe file> instruction. This command allows considerable flexibility, since custom programs can be written to perform a variety of tasks. GoldMine will save the import instructions to a file, and pass that file name as a parameter to the launched application. Since the import instructions are similar to .INI files, you can use Windows' API GetPrivateProfileString to extract the import instructions and data. The ImportData=0 instruction prevents GoldMine from importing any new data, and allows the custom application to append the data.

The `SaveThis=<reference>` instruction will save the entire instruction file to the notes of a new history record. You can specify any history reference; for example, `SaveThis=Web import file`.

You can protect the Web import process with passwords, so that only authorized incoming instruction files may be imported. For details, see “Requiring a Password for Web Import Files” on page 342.



---

GoldMine can also process an import instruction file by sending a DDE command. Using a DDE command allows other applications to create contact records in GoldMine. To start processing an instruction file via DDE, send the `ExecIniImp (<filename>)` command; for example, `ExecIniImp(“c:\goldmine\imp.ini”)`.

---

[Data] Defines the contact data. Format each entry as `fieldName=value`; for example, `City=Long Beach`.

The `fieldName` should be the actual field name in the CONTACT1 or CONTACT2 files. A special `email=field` can be used to insert the contact’s email address.

[ContSupp] Allows the addition of detail records. The fields of each record must have a prefix of `cs#_`, and must appear consecutively. For example, the fields of the first ContSupp record would have the prefix `cs1_`, while the fields of a second record would have a prefix of `cs2_`. You can add a maximum of nine ContSupp records.

Since GoldMine stores Web site addresses as detail records (called **Web Site**), you can import these addresses by using the following syntax:

```
[ContSupp]
cs1_RecType=P
cs1_Contact=Web Site
cs1_ConSupRef=http://www.web.site.com
cs_Address1=Notes (optional)
```

**Example 1**

The following example shows the correct format for an import instruction file:

```
[Instructions]
DupCheck1=Contact
OnNewSendEmail=JON, NEW, Prospect requesting information

[Data]
Company=GoldMine Software Corp.
Contact=Jon Ferrara
Phone1=310/454-6800
email=jferrara@goldmine.com

[ContSupp]
cs1_RecType=P
cs1_Contact=Serial Number
cs1_ContSupRef=10000002
cs1_Address1=This is a test...
```

**Example 2**

The following example shows a short instruction file containing the password "Doodle":

```
[Instructions]
Password=Doodle
DupCheck1=Contact
OnNewSendEmail=JON, NEW, Prospect requesting information

[Data]
Company=GoldMine Software Corp.
Contact=Jon Ferrara
Phone1=310/454-6800
email=jferrara@goldmine.com
```

**Example 3**

The following example shows an import instruction file that contains all possible instructions.

```
[Instructions]
DupCheck1=Contact
DupCheck2=UserDef05
DupCheck3=cs1

OnNewSendEmail=JON, NEW, Prospect requesting information
OnDupSendEmail=AMI,,Repeated request...
```

```
OnNewAttachTrack=Web Lead
OnDupAttachTrack=100067,JON

Run=c:\goldmine\webimp.exe
SaveThis=Web import file
;ImportData=0

Password=Verify

[Data]
Company=GoldMine Software Corp.
Contact=Jon Ferrara
Phone1=310/454-6800
Address1=17383 Sunset Blvd.
City=Pacific Palisades
State=CA
Zip=90272
Source=Web Page
email=jferrara@goldmine.com

[ContSupp]
cs1_RecType=P
cs1_Contact=Serial Number
cs1_ContSupRef=10001001
cs1_Address1=This is a test...

cs2_RecType=C
cs2_Contact=John Doe
cs2_Title=Beta Program Manager
```

### ***Requiring a Password for Web Import Files***

You can protect the Web import process with passwords, so that only authorized incoming instruction files may be imported. This can prevent unauthorized parties from sending you e-mail messages, and flooding your GoldMine system with unwanted data. When the [WebImpPassword] section exists, an import instruction file must contain a Password= entry under an [Instruction] section that matches one of the passwords defined under [WebImpPassword]. If a password is required, the instruction file will *not* be processed if the incoming instruction file does not contain a password, or contains an invalid password.

To require a password, create a [WebImpPassword] section in the GM.INI file. The [WebImpPassword] section contains a password list to test against.

**[WebImp Password]** Place the following setting(s) in the [WebImpPassword] section of GM.INI

`Passwordx=value`

where *x* represents the number of the password, requires the specified password(s) to be processed. The password can consist of up to 20 alphanumeric characters.

Each instruction file can contain only one password; that is, the only allowed instruction is `Password=`. However, the [WebImpPassword] section can contain multiple passwords, numbered from `Password1` through `Password999`.

**Example 1**

The following example includes a password list.

```
[WebImpPassword]
Password1=Yankee
Password2=Doodle
Password3=WentToTown
```

**Example 2**

The following example shows a short instruction file containing the password "Doodle."

```
[Instructions]
Password=Doodle
DupCheck1=Contact
OnNewSendEmail=JON, NEW, Prospect requesting information

[Data]
Company=GoldMine Software Corp.
Contact=Jon Ferrara
Phone1=310/454-6800
email=jferrara@goldmine.com
```

## Setting the Time Period for Automatic Maintenance

To schedule regular indexing and rebuilding of your contact files and/or databases, you can set GoldMine to run Automatic Maintenance after a specified number of days. For example, you can set GoldMine to run Automatic Maintenance every other day.

**[GoldMine]** Place the following setting in the [GoldMine] section of GM.INI.

LastRun= $x$

where  $x$  represents the number of days after performing Automatic Maintenance that GoldMine waits before performing Automatic Maintenance again.

### **Example**

LastRun=7

GoldMine waits seven days after performing Automatic Maintenance before performing Automatic Maintenance again. This setting will run Automatic Maintenance once weekly on the same day.

For details about Automatic Maintenance, see “Setting up Automatic Maintenance” on page 224.

# Appendix B: Troubleshooting Guide

While working in GoldMine, you may occasionally encounter a problem that generates an onscreen error message. These messages correspond to three types of errors:

- **Database errors:** GoldMine maintains a special log that records errors that occur in an open database.
- **System errors:** Depending on the error, GoldMine displays an error message that may or may not include a number.
- **Invalid Page Faults(IPF):** Although occurring during a GoldMine work session, these errors are typically not caused by GoldMine.

Error messages may appear to describe specific types of problems. Whenever GoldMine displays an error message, use Windows' Clipboard to record the entire message. For example, if you see the message

Read failure.

Access to table disabled because of previous error.

Context: appendRecord

C:\PROGRAM FILES\GOLDMINE\GMBASE\SysLog

1: File: C:\PROGRAM FILES\GOLDMINE\GMBASE\SYSLOG.MDX

BDE Error Cat:Code: [36:6] Res:Err: [2406h:24h,1]

BDE Version: 500 [9/6/1998]

GoldMine 5.00.1222

User: T013

Window: GoldMine Process Monitor [1 running]

Tree2

Template: 7500

Details:

FILENAME: C:\PROGRAM FILES\GOLDMINE\GMBASE\SYSLOG.MDX

copy the *entire* message using Windows' Clipboard, then paste the message into a word processor so that you can refer to the message while troubleshooting.

This chapter provides troubleshooting information for database errors, system errors, Invalid Page Faults (IPFs), and modem problems. The list of system errors contains the message or symptom of the problem, probable cause(s) of the problem, and action(s) that you can take to resolve each problem.

If you cannot solve the problem by using the information in this chapter, GoldMine Software offers many avenues of technical assistance to meet your needs.

## Viewing the Error Logs

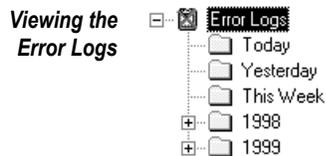
Using GoldMine Sales and Marketing, you can view details on any Borland Database Engine (BDE) errors that occur in an open dBASE or SQL database. You can use this information to troubleshoot and correct the problem.

- To view information about an error, from the Main Menu, select **View|GoldMine Logs**.

The **System Logs** window appears. For details about working with the **System Logs** window, see "Viewing System Logs" on page 280.

From the **System Logs** window, you can *either*:

- Click  next to  Error Logs to display a set of folders, as shown in the following figure
- or*
- Highlight  Error Logs, then select **E**xpand from the local menu to open all folders

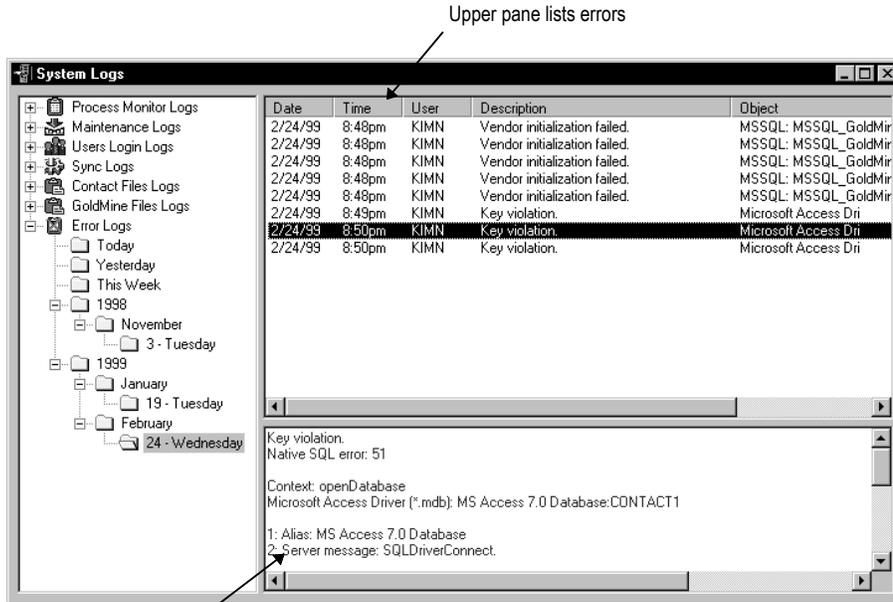


Once you select a specific date folder, the **Error Logs** display the following information in the right pane of the **System Logs** window:

- Date** Date that the database error occurred.
- Time** Time that the database error occurred.
- User** User name of the individual who performed actions that triggered the database error.
- Description** Brief description of the error. The information that appears in this column also appears as the first line of the detailed error description that appears in the lower pane of the **Error Logs**.
- Object** Location and name of the database.
- Machine ID** Unique designation that GoldMine uses to identify the physical PC.

To view detailed information about a database error, highlight an error entry in the browse window. The lower pane displays details on the selected error. Move the scroll bar to the right of the pane to scroll through the detailed information. The following figure provides an example of the **Error Logs** display.

## Error Logs



Lower pane lists details about a selected error

When done viewing the log entries, you can *either* select another folder or system log, *or* click **X** to close the **System Logs** window.

Periodically, you will want to purge old entries in the **Error Logs**. For details, see "Purging System Logs" on page 290.

## Database Errors

Symptom	Probable Cause	Action
<p>Setup cannot merge the IDAPI32.CNF (error during installation)</p> <p><i>or</i></p> <p>GoldMine cannot dynamically load functions from IDAPI32.DLL (error after installation)</p>	<ol style="list-style-type: none"> <li>1. Other applications are currently using the BDE.</li> <li>2. Improper use of the Registry Editor.</li> </ol>	<ol style="list-style-type: none"> <li>1. Check that no other application is using the BDE. If so, exit from those programs, and try again.</li> <li>2. Remove the current BDE Registry entries – see “Removing Current BDE Registry Entries” on page 353.</li> </ol> <p>For details about working with the BDE, see Factsback Bulletin #500.</p>
<p><i>(SQL only)</i></p> <p>BDE cannot locate the database aliased as [<i>database name</i>]</p>	<p>One or more users are trying to use GoldMine with an incompatible BDE.</p>	<p>See “Working with the BDE Configuration File(s)” on page 355.</p>
<p>Failure to open a file.</p>	<ol style="list-style-type: none"> <li>1. Index file (.MDX) has become damaged.</li> <li>2. A database file (.DBF) has become corrupted.</li> </ol>	<ol style="list-style-type: none"> <li>1. <b>Damaged index file:</b> reindex with the <b>Maintenance Wizard</b> – see <b>Corrupt Table/Index Header</b> below.</li> <li>2. <b>Corrupted database file:</b> restore the damaged file(s) from backup – see “Troubleshooting Damaged Files” on page 352.</li> </ol>

Symptom	Probable Cause	Action
<p><b>Corrupt Table/Index Header</b></p>	<p>1. One of the index files (.MDX) that GoldMine uses has become damaged.</p>	<p><i>Back up your data before reindexing and rebuilding database files.</i></p> <p>1. Use <b>GoldMine's Maintenance Wizard</b> to reindex and rebuild your database files. Select the following from the wizard:</p> <p>First screen: <b>All Database Files</b></p> <p>Second screen: <b>Files in GoldMine Directory</b> and <b>All Contact Files</b></p> <p>Third screen: <b>Rebuild and Pack the database file</b>, and <b>Verify the data and synchronization information</b></p> <p>For details about <b>GoldMine's Maintenance Wizard</b>, see "Indexing and Rebuilding Files" on page 219.</p> <p>If GoldMine does not start correctly after reindexing and rebuilding: at the banner display, type your user name and password (if required), then press and hold <b>CTRL</b> while you click <b>OK</b>. Continue to press <b>CTRL</b> until the <b>Contact Set Databases</b> dialog box appears. From the list, select the contact file that is displayed in the error message, then click <b>Maintain</b>. Select the same options from <b>GoldMine's</b></p>

Symptom	Probable Cause	Action
<p><b>Corrupt Table/Index Header</b> (<i>cont.</i>)</p>	<p>2. (<i>Network</i>) Hardware dysfunctionality in network cards, cables, etc.</p>	<p><b>Maintenance Wizard</b> as listed above.</p> <p>If database errors continue, and you are running GoldMine (dBASE), you might need to change a BDE setting. See "Changing the <b>dBASE Level</b> in the BDE" on page 358.</p> <p>2. Check for hardware problems with network equipment; also check for the following on all machines (including stand-alone systems):</p> <ul style="list-style-type: none"> <li>• No disk compression utilities running, such as DoubleDisk, Superstor, etc.</li> <li>• Check for hard disk problems by running the Windows program SCANDISK. If no hardware problems are detected, but database errors continue, run complete diagnostics with a program, such as QAPLUS.</li> </ul>
<p><b>Access to table disabled because of previous error</b></p>	<p>Previously unresolved BDE error.</p>	<p>Reindexing and rebuilding GoldMine's databases can identify the unresolved error. See item 1 for <b>Corrupt Table/Index Header</b> above.</p>

Symptom	Probable Cause	Action
<p><b>Corrupt Memo/BLOB file</b></p>	<p>Database (.DBF) file's pointers to the corresponding .DBT file are damaged.</p>	<p>Reindexing and rebuilding GoldMine's databases can identify the unresolved error. <i>Back up your data before reindexing and rebuilding database files.</i></p> <p>See <b>Corrupt Table/Index Header</b> above. Be sure to select <b>Verify the data and synchronization information option.</b></p>

## BDE Errors

GoldMine uses the Borland Database Engine to access your contact databases. For GoldMine to run properly, each workstation must have access to the BDE. The BDE can be located locally on the workstation, or across the network.

GoldMine supports *only* BDE version 4.51 or higher. Check each BDE installation to ensure that a supported version is running.



---

Working with the BDE can cause changes that will affect the performance of your entire system. Only an individual with experience in file manipulation and configuration settings should attempt the operations described in this section, such as your network administrator or an Authorized GoldMine Solutions Partner. For a qualified Solutions Partner in your area, contact the GoldMine Software Sales Department at 800-654-3526.

---

Problems with the BDE can often involve access issues, such as a failure by GoldMine to locate the BDE. The following sections provide detailed instructions for troubleshooting BDE-related errors.



---

A complete set of Borland error messages is available at [http://www.inprise.com/devsupport/bde/ti\\_list/TI3212.html](http://www.inprise.com/devsupport/bde/ti_list/TI3212.html).

---

## Removing Current BDE Registry Entries

GoldMine must have exclusive access to the BDE during installation and normal running. Check that no other applications that use the BDE are currently in use if the following error messages appear:

- **Setup cannot merge the IDAPI32.CNF file** (during the installation of GoldMine)
- **GoldMine cannot dynamically load functions from IDAPI32.DLL**

If no other applications are using the BDE, then perform the following procedure.



---

**Caution!** Improper use of the Registry Editor can render your system unusable to the extent that you may have to reinstall Windows NT/95/98, and/or restore GoldMine from backup. We strongly recommend that you *either* back up your registry, *or* export the registry from the Registry Editor.\*

GoldMine Software cannot guarantee that problems resulting from the improper use of the Registry Editor can be fixed.

---

1. From the Windows task bar, select the **Start** button, then select **R**un. The **Run** dialog box appears.
2. Type `Regedit`, then select **OK** to start the **Registry Editor**.
3. In the left pane of the **Registry Editor**, double-click on **HKEY\_LOCAL\_MACHINE**.
4. Double-click on **SOFTWARE**.
5. Double-click on **Borland**.
6. Click on **Database Engine**, then press `[DEL]`. The **Confirm Key Delete** dialog box asks:  

**Are you sure you want to delete this key?**
7. Select **Yes**.
8. Select **BLW32**, then press `[DEL]`. The **Confirm Key Delete** dialog box displays the same prompt described in step 6.
9. Select **Yes**.

When next run, GoldMine will correct these entries.

---

\* To export your registry, from the Registry Editor's Main Menu, select **Registry|Export Registry**.

### **Working with the Borland Database Engine Configuration File(s)**

Some situations require changes to the BDE configuration file(s) (idapi32.cfg) to enable all GoldMine users to access all databases, such as:

- SQL databases that require an alias to reside in the BDE configuration file
- When making changes to the BDE configuration that are global to all users

If all users access the BDE located on the server, they should use the same configuration file, and therefore have the same list of aliases and settings. However, users may install or use a preexisting, compatible version of BDE on their workstation that successfully accesses GoldMine. This setup will work until SQL databases are created and an alias is entered in the server's BDE configuration. At this time, when a workstation that uses a different BDE configuration tries to access the database, errors will occur, indicating that BDE cannot locate the database aliased as *xxxxx*.

You can try the following to correct the error:

- Force the workstation(s) to use the entire BDE on the server as described in "Removing Current BDE Registry Entries" on page 353.
- Merge the configuration file of the server's BDE with the workstation's BDE configuration file – continue with "Merging the BDE Configuration Files" below.
- Make the configuration file of the server's BDE the default configuration for the workstation – see "Copying the Server's BDE Configuration to a Workstation" on page 357.



---

Unless other constraints require locating the BDE (or the configuration file) on the workstation(s), forcing the workstation(s) to use the server's BDE configuration is the easiest method to administer.

---

### **Merging the BDE Configuration Files**

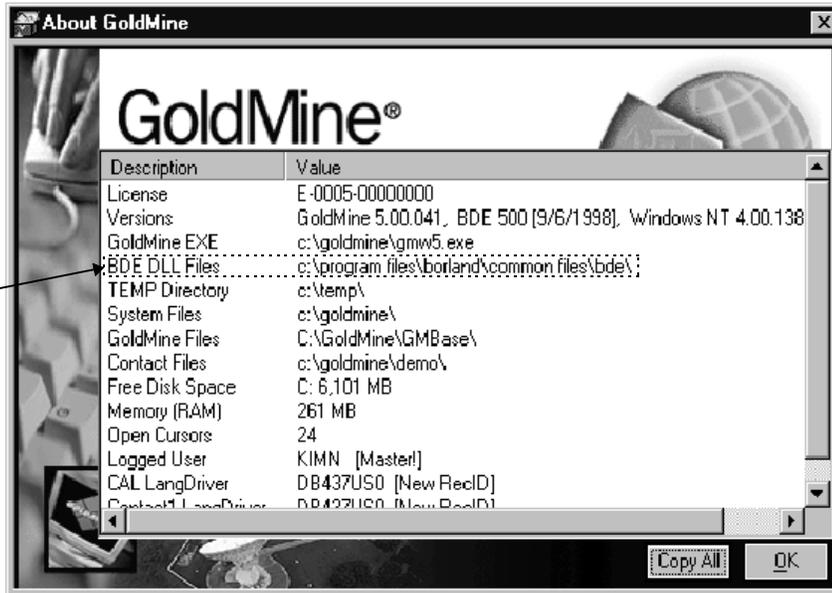
Merging the configuration file of the server's BDE with the one used by the local workstation's BDE will add all aliases entered into the server's BDE configuration to the local workstation's list of aliases. Having the alias listed enables the workstation to connect to the database.

To find the current location of the BDE files in use by GoldMine:

1. From GoldMine's Main Menu, select **H**elp|**A**bout.
2. Select **S**ystem.

*Finding the current location of the BDE files in use by GoldMine*

Note the BDE DLL Files path



3. Note the path to the **BDE DLL Files**.
4. Quit GoldMine, *and* any other application(s) using the BDE.
5. From the Windows task bar, select **S**tart, then select **P**rograms|**W**indows **E**xplorer. Browse to the path noted in step 3.
6. From the folder containing the BDE .DLL files, double-click on **bdeadmin.exe** to start the BDE Administrator.
7. From the BDE Administrator Main Menu, select **O**bject|**M**erge Configuration. The **O**pen dialog box appears.

8. Navigate through your network to the location of the IDAPI32.CFG that has the settings you want for the workstation's local configuration. Select **O**pen.

9. The BDE Administrator displays a warning that:

**Merge cannot be undone**

10. Select **O**K.

11. Click  on the title bar to close the BDE Administrator.

### ***Copying the Server's BDE Configuration to a Workstation***

You can make the configuration file of the server's BDE the default configuration for the workstation. Using this method, the workstation can access its local BDE with the server's configuration file.

1. To find the current location of the BDE files in use by GoldMine, follow steps 1-3 in "Merging the BDE Configuration Files" on page 355.

2. Quit GoldMine, *and* any other application(s) using the BDE.

3. From the Windows task bar, select **S**tart, then select **P**rograms|**W**indows **E**xplorer. Browse to the path noted in step 1.

4. Quit GoldMine, *and* any other application(s) using the BDE.

5. From the Windows task bar, select **S**tart, then select **P**rograms|**W**indows **E**xplorer.

6. From the folder containing the BDE .DLL files, double-click on **b**deadmin.exe to start the BDE Administrator.

7. From the BDE Administrator Main Menu, select **O**bject|**O**pen Configuration. The **O**pen dialog box appears.

8. Browse to the location of the IDAPI32.CFG that you want to select as the default configuration for this workstation. Select **O**pen.

9. Click  on the title bar to close the BDE Administrator..

10. The BDE Administrator asks:

**Use \\xxxxxx\idapi32.cfg as default configuration?**

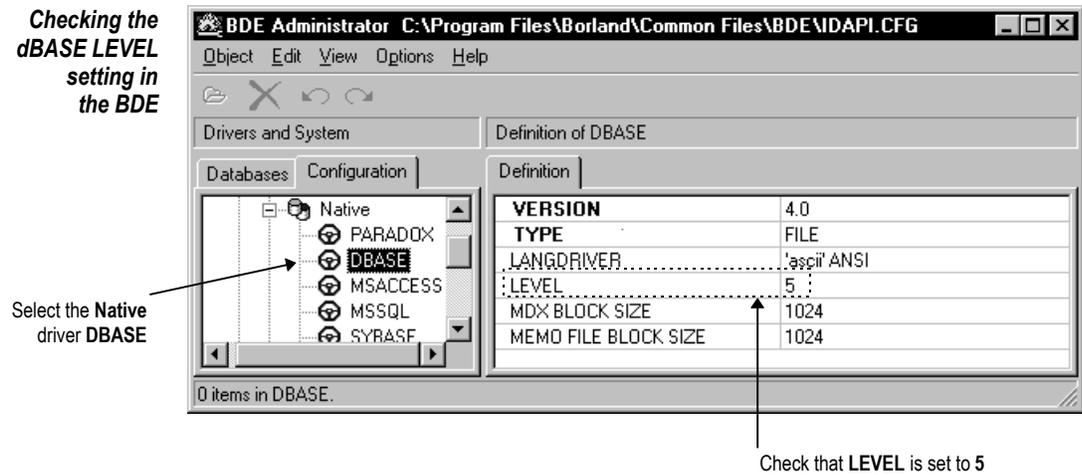
11. Select **Y**es.

## **Changing the dBASE Level in the BDE**

An incorrect setting in the BDE Administrator can generate some database errors.

1. To find the current location of the BDE files in use by GoldMine, follow steps 1-3 in "Merging the BDE Configuration Files" on page 355.
2. Quit GoldMine, *and* any other application(s) using the BDE.
3. From the Windows task bar, select **Start**, then select **Programs|Windows Explorer**. Browse to the path noted in step 1.
4. Quit GoldMine, *and* any other application(s) using the BDE.
5. From the Windows task bar, select **Start**, then select **Programs|Windows Explorer**.
6. From the folder containing the BDE .DLL files, double-click on **bdeadmin.exe** to start the BDE Administrator.
7. Select the **Configuration** tab.
8. In the left pane, double-click  Configuration.
9. Double-click  Drivers.
10. Double-click **Native**.

**Checking the dBASE LEVEL setting in the BDE**



11. Select **DBASE**.
12. In the right pane, check that **LEVEL** is set to **5**.  
  
If not, change the **LEVEL** entry to **5**, then go to step 14.  
  
If you changed the **LEVEL** setting, continue with step 13.
13. To save your change, from the BDE Administrator Main Menu, select **Object|Apply**.
14. Click **X** on the title bar to close the BDE Administrator.

## **Troubleshooting Damaged Files**

An index error message appears when GoldMine cannot open a file because of one of the following problems:

- Index file (.MDX) has become damaged – see “Reindexing Damaged Files” below.
- Database file (.DBF) has become corrupted – see “Restoring Database Files” on the following page.

The error message names the file that GoldMine cannot open. For example, the error message

**F:\APPS\GOLDMINE\Forms.mdx index file is missing.  
Would you like to re-index this file?**

indicates that GoldMine cannot open the file Forms.mdx located in the directory F:\APPS\GOLDMINE. When the error message appears, write down the entire message, including path and file name information. In this example, knowing the file name of the damaged index will enable you to save time by reindexing only the necessary file.

### ***Reindexing Damaged Files***

An index file serves as a pointer to allow GoldMine to quickly locate information in a data file, or present the information in the data file in an alternate sequence. Therefore, a damaged index file has no effect on data.

An index file can become damaged from any of the following causes:

- Rebooting or turning off computers before quitting GoldMine
- Hardware problems, such as bad sectors on a hard disk, or corrupted memory
- Heavy use

To correct damaged index files:

From the error message, select **Yes**. GoldMine displays the **GoldMine's Maintenance Wizard**. By default, GoldMine will select the damaged file for reindexing.

If you cannot access the Main Menu, close the error message, then exit Windows. Restart Windows, then open GoldMine. At the login banner display, enter your username and password if required, then press **CTRL**, and select **OK** on the banner display. GoldMine displays a list of contact sets available for your system. Select the contact set that appeared in the error message, then select **Index**.

## Correcting Chronic Index Errors

If index errors recur on a regular basis, your system may have a hardware or environment problem. To troubleshoot hardware problems, see **Corrupt Table/Index Header** on page 350.

Environment problems can involve:

- Version of Windows running on workstations – see “Checking VREDIR.VXD running in Windows” below.
- Version of Service Pack running on a Windows NT 4.0 system – see “Updating your Windows NT 4.0 Service Pack” on page 362.

If index errors continue, you might need to remove all index (.MDX) files from the GoldMine directory – see “Correcting Advanced Index Corruption” on page 364.

### Checking VREDIR.VXD running in Windows

One possible cause can be the version of Windows that runs on a PC or workstation. Indexing errors have been linked to VREDIR.VXD, which is shipped with Windows 95 version 4.00.950B.

You can determine what version of Windows is running on a system by selecting **Settings|Control Panel|System**. To check the version of VREDIR.VXD, note the file size of VREDIR.VXD in the Windows\System directory. The following table lists the acceptable sizes and dates for this file.

**Table 9.**  
**VREDIR.VXD**  
**Files**

Date	Size	Version	Usable?	Source
7/11/95	138Kb	4.00.950	yes	Windows 95 version A (cab 12)
11/7/95	138Kb	4.00.955	yes	ftp://ftp.microsoft.com/Softlib/MSLFILES/VREDRUPD.EXE
12/31/95	138Kb	4.00.955	yes	Windows 95 Service Pack 1
8/24/96	154Kb	4.00.1111	NO	Windows 95 version B (OSR2) (cab 19)
11/14/96	138Kb	4.00.954	yes	
7/25/97	158Kb	4.10.1546	NO	Windows 98 Beta Build 1546
9/4/97	158Kb	4.10.1581	yes	Windows 98 Beta Build 1581
9/11/97	154Kb	4.00.1116	yes	ftp://ftp.microsoft.com/Softlib/MSLFILES/VREDRUPD.EXE

Each workstation on the network must use one of the files marked with yes in the **Usable** column. If you have a file marked with NO in the **Usable**

column, you can get an update that will not cause the indexing problem. You can either copy this file from a workstation using 4.00.950 or 4.00950A Windows 95, or download the latest VREDIR.VXD from the Microsoft Web site at the following address:

`ftp://ftp.microsoft.com/softlib/MSLFILES/VRDRUPD.EXE.`

By accessing the address listed above, you will automatically start to download a self-extracting program file that contains an updated VREDIR.VXD file. Be sure to extract VRDRUPD.EXE on all systems with the problematic VREDIR.VXD.

For information on other troubleshooting problems that have causes other than GoldMine, see "Invalid Page Faults" on page 368.

#### **Updating your Windows NT 4.0 Service Pack**

To run GoldMine successfully under Windows NT 4.0, you must have Service Pack 3 installed. Running GoldMine under Windows NT 4.0 with Service Pack 2 can cause database errors. To verify the version of Service Pack installed on your system, reboot the system, then watch the Windows NT 4.0 startup screen. This screen should display the following:

#### **Windows NT Version 4.0 (Build xxx:Service Pack 3)**

If the screen shows Service Pack 2, we strongly recommend that you upgrade to Service Pack 3.



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Before installing Service Pack 3, you must uninstall Service Pack 2.

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If database errors continue after installing Service Pack 3, you can then change entries in Windows Registry.



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**Caution!** Improper use of the Registry Editor can render your system unusable to the extent that you may have to reinstall Windows NT/95/98, and/or restore GoldMine from backup. We strongly recommend that you *either* back up your registry, *or* export the registry from the Registry Editor.\*

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GoldMine Software cannot guarantee that problems resulting from the improper use of the Registry Editor can be fixed.

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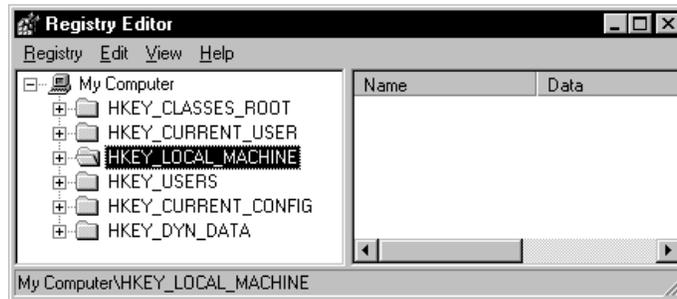
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\* To export your registry, from the Registry Editor's Main Menu, select **Registry|Export Registry**.

Add the following two registry values to your Windows NT 4.0 server that is hosting the GoldMine files:

1. From the Windows task bar, select the **Start** button, then select **R**un. The **Run** dialog box appears.
2. Type `Regedit`, then select **OK** to start the **Registry Editor**.
3. Double-click **HKEY\_LOCAL\_MACHINE**.

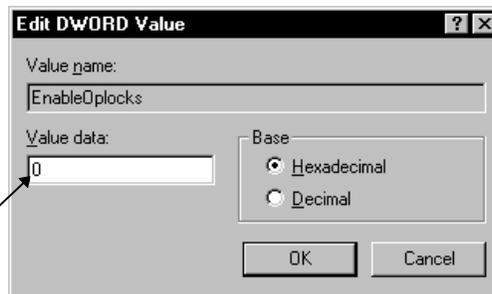
*Using the Registry Editor to change entries*



4. To reach the folder with the entries that you want to change, double-click **System,CurrentControlSet,Services,LanManServer, and Parameters**.
5. From the **Registry Editor** Main Menu, select **E**dit|**N**ew|**D**WORD Value. In the right pane, **New Value #1** appears. A cursor is placed inside the box.
6. Type `CachedOpenLimit` in the text box.
7. From the Main Menu, select **E**dit|**M**odify.
8. Type `0` for **Value data**, then select **OK**.

*Edit DWORD Value dialog box*

Check that Value data is 0 (zero)



9. From the **Registry Editor** Main Menu, select **Edit|New|DWORD Value**. In the right pane,  appears.
10. Type EnableOplocks in the text box.
11. Repeat steps 7–8 to complete the Registry value modifications.

### **Correcting Advanced Index Corruption**

If index errors continue, you might need to delete all index (.MDX) files from the GoldMine directory and every subdirectory.

To restore the .MDX files after deletion:

1. Start GoldMine.
2. At the banner display, type your user name and password (if required), then press and hold  while you click **OK**.
3. Continue to press  until the **GoldMine Set Databases** dialog box appears. This dialog box shows a list of the available contact files.
4. Select **Maintain**.
5. Reindex and rebuild your databases according to the instructions provided in **Corrupt Table/Index Header** on page 350.

### **Restoring Database Files**

Once corrupted, a database file must be replaced, or overwritten. To restore a database file, restore the file from backup as follows:

<b>If this file is corrupted. . .</b>	<b>. . .restore these files from backup</b>
CAL	CAL.DBF, CAL.DBT
CONTACT1	CONTACT1.DBF, CONTACT1.DBT
CONTACT2	CONTACT2.DBF
CONTHIST	CONTHIST.DBF, CONTHIST.DBT
CONTSUPP	CONTSUPP.DBF, CONTSUPP.DBT
INFOMINE	INFOMINE.DBF, INFOMINE.DBT
<i>filename</i>	restore <i>filename</i> .DBF and <i>filename</i> .DBT if the files exist

After you restore the file(s), reindex GoldMine's database files. To reindex, from the Main Menu, select **Tools|Maintain Databases**.

If you do not have backup files, contact a GoldMine Solutions Partner for assistance.

A corrupted database file can indicate an underlying environment problem. For information on troubleshooting problems that have causes other than GoldMine, see "Invalid Page Faults" on the page 368.

## System Errors

Symptom	Probable Cause	Action
<p><b>Insufficient Memory to Run Application (error during or after installation)</b></p>	<p>Indicates that either the system does not have enough memory to start GoldMine, or that GMW5.EXE or a GoldMine DLL has been corrupted.</p>	<p>In Windows Explorer, select <b>Help About</b> to check that at least 65,000Kb physical memory is free. If not, close applications to free 65,000Kb memory.*</p> <p>Replace the .EXE and .DLL files in the directory to which GoldMine is being installed, or from which GoldMine currently runs.</p>
<p><b>System Error 10061</b></p>	<p>While you are trying to perform an online operation, such as synchronizing via direct Internet connection or retrieving e-mail, GoldMine is able to locate the remote system but does not find a GoldSync server or e-mail server awaiting incoming connections.</p>	<p>Check that you have entered the correct IP address to the remote system. For example, if you are synchronizing with a remote GoldMine system by direct Internet connection, check the <b>Remote's Internet IP address</b> entry.</p> <p>If IP address entry is correct, check that the host system is running the necessary application, and is waiting for an incoming connection.</p>

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\* 75,000Kb is recommended to enable other applications to make use of this "free" space. Depending on your needs, you might require more space.

Symptom	Probable Cause	Action
<b>System Error 10065</b>	While you are trying to perform an online operation, such as synchronizing via direct Internet connection or retrieving e-mail, GoldMine cannot find a route to the remote host system.	<p>Check that you have entered the correct IP address to the remote system. For example, if you are synchronizing with a remote GoldMine system by direct Internet connection, check the entry in the <b>Remote's Internet IP address</b> field.</p> <p>If IP address entry is correct, there may be a problem in the connection itself. Try connecting again later.</p>

## Invalid Page Faults

Invalid Page Faults (IPFs) in Windows can be difficult to diagnose. While the error might occur only with GoldMine, the cause of the error is typically *not* GoldMine. Users with extensive technical experience can use the following guidelines to isolate and correct the problem. If you do not have extensive technical experience, contact your system administrator or an experienced computer consultant to perform these diagnostics for you. For a qualified Solutions Partner in your area, contact the GoldMine Software Sales Department at 800-654-3526.



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GoldMine Software technical support will provide support only to the extent of determining whether GoldMine is causing the error. If the cause of the problem is not GoldMine or a damaged GoldMine data file, then technical support can provide a referral to a GoldMine Solutions Partner. A Solutions Partner can provide help on-site to diagnose what is causing the error.

---

An IPF error that occurs during the pack and rebuild process is typically caused by a damaged data file – see “Restoring Database Files” on page 362.

IPF is caused by . . .	. . .take this action
<b>Corrupt index</b>	From the Windows Desktop, start GoldMine. If you can access the Main Menu, select <b>File Maintain Databases All Database Files</b> to reindex. To best maintain GoldMine, reindex all files on a weekly basis.
<b>Disk compression</b>	If possible, do not use disk compression software with GoldMine. If you must, place GoldMine in an uncompressed partition of your hard drive, and place other software applications in the compressed partition. Contact the vendor of the compression software for more information.
<b>Corrupted Windows files</b>	Reinstall Windows to a temporary directory using different installation disks than were used to install Windows previously. Once Windows is installed to the temporary directory, start Windows from this directory. From the <b>Start</b> menu, select <b>R</b> un. From the <b>Run</b> window, in the <b>O</b> pen field, type C:\GOLDMINE\GMW5.EXE, then press  .

IPF is caused by. . .	. . .take this action
<b>Incompatible or conflicting video driver</b>	<p>Some video drivers supplied with Windows can cause GoldMine data, such as dates and times, to appear dimmed or “greyed out,” as well as cause IPF errors. To change your video driver to the standard VGA driver:</p> <p>From the <b>Start</b> menu, select <b>Settings Control Panel</b>. From the <b>Control Panel</b>, select the <b>Display</b> icon, which accesses the <b>Display Properties</b> window. Select the <b>Settings</b> tab, then select <b>Change Display Type</b>.</p> <p>In the <b>Select Device</b> dialog box, to the right of the <b>Adapter Type</b> field, select <b>Change</b>, then select the <b>Show all devices</b> options. Scroll through the <b>Manufacturers</b> pane to select <b>Standard Adapter Type</b>. In the <b>Models</b> pane, select <b>Standard Display Adapter (VGA)</b>. Apply the selection.</p> <p>If changing the video driver as described corrects the problem, contact the manufacturer of your video card for an updated video driver.</p>
<b>Low memory</b>	<ol style="list-style-type: none"> <li>1. Quit any running programs. Start Windows with no programs running. If the error does not occur again, start each program that was running when the error occurred to determine which program may have caused the error. If the problem occurs again, continue troubleshooting with numbers 2–3.</li> <li>2. In Windows Explorer, select <b>Help About</b> to check that at least 16,000Kb physical memory is free. If not, close applications, then reboot Windows to free memory.</li> <li>3. Run a diagnostic that checks memory, such as CHECKIT. Replace failed memory.</li> </ol>
<b>Cross-linked or truncated files</b>	<p>Run the SCANDISK diagnostic to test your hard disk.</p>
<b>Corrupted RAM or hardware problem</b>	<p>Test RAM and hardware with a hardware diagnostic software, such as CHECKIT or QAPlus.</p>

IPF is caused by . . .	. . .take this action											
<b>Out of Disk Space</b>	<p><b>Stand-alone</b></p> <p>To check disk space:</p> <p>At the DOS prompt, type CHKDSK, then press <input type="button" value="ENTER"/> to display the bytes available on the hard disk. To run GoldMine, you must have at least 32MB available.</p> <p><b>Network</b></p> <p>Ask your system administrator or computer consultant to check the amount of free disk space in the volume containing GoldMine.</p>											
<b>TSR or device driver conflicts with another program</b>	<p>Start, or <i>boot</i>, your computer from a standard boot floppy diskette that contains a CONFIG.SYS file with only FILES, BUFFERS, and HIMEM settings, and an AUTOEXEC.BAT file that loads only essential network drivers. If not available, ask your system administrator or computer consultant for help in making a standard boot disk.</p>											
<b>Windows is using an incorrect .DLL file</b>	<p>An error can result if Windows uses a .DLL file with the same name as one of GoldMine's .DLL files. The following .DLL files should be found in the GoldMine directory only:</p> <table border="1" data-bbox="558 926 1234 1077"> <tbody> <tr> <td data-bbox="558 926 789 974">DUNZIP32.DLL</td> <td data-bbox="789 926 1019 974">DZIP32.DLL</td> <td data-bbox="1019 926 1234 974">GMDB32.DLL</td> </tr> <tr> <td data-bbox="558 974 789 1022">GMNU32.DLL</td> <td data-bbox="789 974 1019 1022">GMRE32.DLL</td> <td data-bbox="1019 974 1234 1022">GMTB32.DLL</td> </tr> <tr> <td data-bbox="558 1022 789 1071">INETWH32.DLL</td> <td data-bbox="789 1022 1019 1071">PMSDK16.DLL</td> <td data-bbox="1019 1022 1234 1071"></td> </tr> </tbody> </table> <p>Check for these .DLL files in the WINDOWS directory, the WINDOWS\SYSTEM directory, and all directories in the path. If you find any of these files in a directory other than the GoldMine directory, copy the files to a floppy diskette, then delete the files from the hard disk.</p>			DUNZIP32.DLL	DZIP32.DLL	GMDB32.DLL	GMNU32.DLL	GMRE32.DLL	GMTB32.DLL	INETWH32.DLL	PMSDK16.DLL	
DUNZIP32.DLL	DZIP32.DLL	GMDB32.DLL										
GMNU32.DLL	GMRE32.DLL	GMTB32.DLL										
INETWH32.DLL	PMSDK16.DLL											
<b>Corrupted GoldMine program file</b>	<p>Install GoldMine to a <i>different</i> directory than where you are currently running GoldMine. For example, create a TEMP directory, then install GoldMine. Copy .DLL files and .EXE files to your existing GoldMine directory.</p>											

## Troubleshooting Synchronization

To troubleshoot synchronization problems, the best starting point is to determine where the problem occurs. There are three basic phases in the synchronization process:

- Creation of the transfer set
- Movement of the transfer set from the sender to the receiver
- Retrieval of data from the incoming transfer set

You can use the following list to troubleshoot errors that occur during one of these phases.

Some errors that occur during synchronization are caused by issues outside of GoldMine, such as TAPI and Winsock errors. For suggestions on troubleshooting these problems, see "System Errors" on page 365 and "Troubleshooting Modem Problems" on page 377.

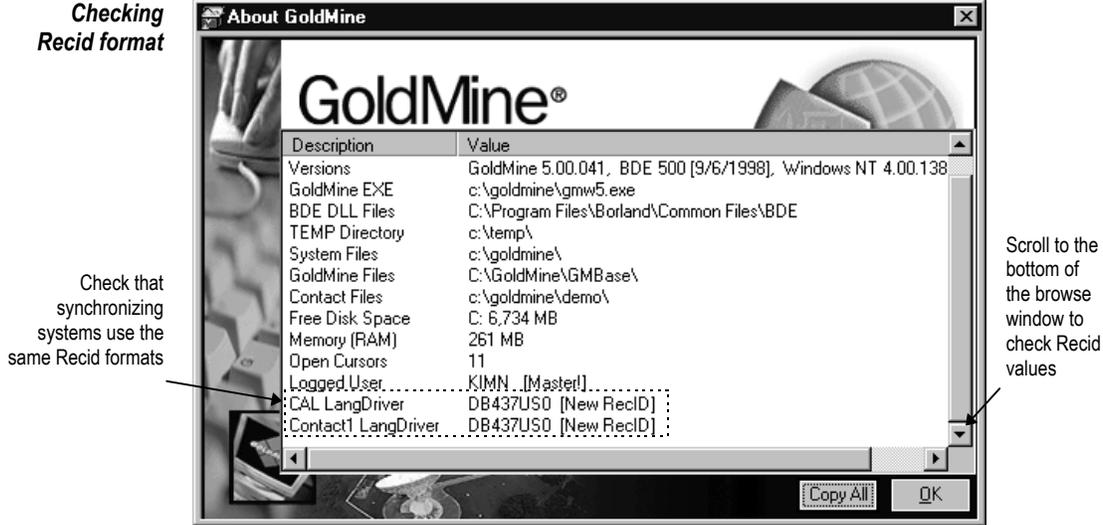
Symptom	Probable Cause(s)	Action
<b>Transfer set is not created successfully.</b>	<ol style="list-style-type: none"><li>1. BDE error, indicating a problem with the database files or hardware.</li><li>2. GoldMine or GoldSync may not be configured correctly to generate the appropriate transfer sets.</li></ol>	<ol style="list-style-type: none"><li>1. Correct the BDE error – see "BDE Errors" on page 352.</li><li>2. Edit the synchronization configuration to include missing databases. For details, see either <i>Synchronizing with GoldMine Sales and Marketing</i> (GoldMine), or the <i>GoldSync Administrator's Guide</i> (GoldSync)..</li></ol>

Symptom	Probable Cause(s)	Action
<p><b>Changed records are not placed in the transfer set.</b></p>	<p>Options for selecting records for the transfer set were not set to include the missing records. For example, the cutoff date may have been set to a date after changes were made to the record(s). Other factors can also affect which records are included in a transfer set, such as improper installation of GoldMine, or an activated filter.</p>	<p>Check that logging options are selected in <i>either</i> the <b>Synchronization Wizard</b> (GoldMine), or the <b>GoldSync Manager</b>. If so, a record count added from each database file appears in the <b>GoldMine Process Monitor</b> during the sync session, and is recorded in the <b>Contact Files Logs</b> or <b>GoldMine Files Logs</b>. If these logs show that GoldMine/GoldSync added the appropriate records to the transfer set, you can examine the transfer set in detail by using the <b>Synchronization Wizard</b> to uncompress the transfer set. If the transfer set does not include the record(s) that did not transfer, check the options set for creating the transfer set to see if the records failed to meet a specified criterion, such as cutoff date, filter, etc.</p>
<p><b>Transfer set did not transfer to the retrieving system.</b></p>	<p>Failed connection to the remote, or to the medium used for transfer, such as POP3, SMTP servers, or WAN drives.</p>	<p>Check the <b>GoldMine Process Monitor</b> for details about connections. If no connection was established, check the settings entered in GoldMine or GoldSync to reach the destination system – for details, see <i>Synchronizing with GoldMine Sales and Marketing</i> (GoldMine), or the <i>GoldSync Administrator's Guide</i> (GoldSync)..</p>

Symptom	Probable Cause(s)	Action
<p>Transfer set did not transfer to the retrieving system. (<i>cont.</i>)</p>		<p>If the configuration settings are correct, check for an environmental problem – see “Troubleshooting Modem Problems” on page 377.</p>
<p>Remote site did not successfully retrieve the transfer set.</p>	<p>1. Transfer set decryption failed because sending system and retrieving system are using:</p> <p>a. Different versions of GoldMine.</p> <p>b. Different passwords.</p> <p>c. Different Recid formats</p>	<p>1a. Use GoldMine’s <b>Net-Update</b> to install the latest version of GoldMine on the system(s) running an older version – see “Updating your Copy of GoldMine” on page 274.</p> <p>b. Check the password entered in either the <b>Synchronization Wizard</b>, or the <b>Site</b> tab of the <b>GoldSync Manager</b>.</p> <p>c. Check that each system is using Recid records of the same format. Synchronizing systems must use the same format to synchronize in both directions.</p> <p>To check the Recid values, from the Main Menu, select <b>Help About</b>. From the <b>About GoldMine</b> dialog box, select <b>System</b>. Scroll to the</p>

Symptom	Probable Cause(s)	Action
Remote site did not successfully retrieve the transfer set. (cont.)		bottom of the browse window to view the Recid information, as shown in the following figure.

**Checking Recid format**



Remote site did not successfully retrieve the transfer set. (cont.)		If systems are using different Recid formats, use GoldMine's <b>Maintenance Wizard</b> to convert the older Recid format to the newer format—see "Indexing and Rebuilding Files" on page 219
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Symptom	Probable Cause(s)	Action
<p>Remote site did not successfully retrieve the transfer set. (<i>cont.</i>)</p>	<p>2. Transfer set decompression failed because:</p> <ul style="list-style-type: none"> <li>a. Retrieving system is using multiple or outdated versions of DZIP32.DLL and DUNZIP32.DLL.</li> <li>b. GoldMine or GoldSync cannot locate DZIP32.DLL and DUNZIP32.DLL.</li> <li>c. GoldMine's TLog record* corresponding to a record is more recent than the TLog record, indicating a change, <i>or</i> a TLog record indicates that the record that the record was not updated because it has been deleted</li> </ul>	<p>2a. Delete multiple instances of DZIP32.DLL and DUNZIP32.DLL occurring outside of the GoldMine directory, and/or check both files for a file date of 12/05/97.</p> <ul style="list-style-type: none"> <li>b. Check the path shown in the SYSDIR setting in GM.INI against the actual location of the files, and correct the SYSDIR entry, if necessary.</li> <li>c. Check the <b>Contact Files Logs</b> (CONTTLOG.DFB) or <b>GoldMine Files Logs</b> (GMTLOG.DBF) for TLog(s) corresponding to the record(s) not receiving updates. TLogs with the ZzzDel code indicate that a record has been deleted. No changes, even those dated after the zzzDel TLog, will be incorporated into a record.</li> </ul>

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\* GoldMine retrieves updates from a transfer set based on TLog records, which record changes or deletions to a contact record. For details, see the *GoldSync Administrator's Guide*.

Symptom	Probable Cause(s)	Action
<p><b>Compression and decompression errors.</b></p>	<p>Incompatible version or multiple copies of DZIP32.DLL and DUNZIP32.DLL.</p>	<p>Check for the following:</p> <ul style="list-style-type: none"> <li>• GM.INI is using all mapped drive letters instead of UNC paths.</li> <li>• System is running only one copy each of DZIP32.DLL and DUNZIP32.DLL, which should be located in the GoldMine directory.</li> <li>• System is using the same versions of DZIP32.DLL and DUNZIP32.DLL as the system that sent the transfer set.</li> </ul>

Symptom	Probable Cause(s)	Action
<p><b>Synchronization is unsuccessful because modems cannot communicate properly.</b></p>	<p>Modems are trying to connect at either:</p> <ul style="list-style-type: none"> <li>• Nonstandard baud rate</li> </ul> <p style="text-align: center;"><i>or</i></p> <ul style="list-style-type: none"> <li>• Incompatible baud rate</li> </ul>	<p>Select a baud rate that is <i>slower</i> than the fastest baud rate of the modem. For example, if the modem is capable of 14,400 BPS, set the speed to 9,600 BPS. Set the baud rates at one of the following:</p> <ul style="list-style-type: none"> <li>• 1,200</li> <li>• 2,400</li> <li>• 9,600</li> <li>• 19,200</li> <li>• 38,400</li> <li>• 57,600</li> </ul> <p>For a 14,400 BPS modem, open a port at 19,200 to correct communications problems.</p> <p>For additional information, see FactsBack #651.</p>

## Troubleshooting Modem Problems

The following list shows probable causes and corrective actions for problems involving modem initialization, reset, or connection problems encountered while trying to synchronize.

Suspected Cause	Action
<p><b>Incorrect COM port setting for the modem.</b></p>	<p>Use the Windows accessory program HyperTerminal to test the COM port and dialing settings:</p> <p>From the Windows task bar, select <b>Start</b>, select <b>Programs</b>, then select the <b>Accessories</b> program group. Select HyperTerminal. Click on any HyperTerminal session, which is represented by a folder with the extension .HT, such as COMPUSERVE.HT. The <b>Phone Number</b> dialog box appears. Select <b>Cancel</b>, which will close the dialog box, but leave the HyperTerminal window open.</p> <p>To check the COM port setting, type AT, then press <input type="button" value="ENTER"/>. The displayed response should be OK.</p> <p>Type ATZ, then press <input type="button" value="ENTER"/>. The displayed response should be OK.</p> <p>If the response is <i>not</i> OK, select another COM port for the modem in the Windows Control Panel by clicking on the <b>Modems</b> icon, then select the modem listed in the <b>General</b> tab, and select <b>Properties</b>. When done changing settings in the Control Panel, test again.</p>
<p><b>Installing a communications application has replaced Windows COMM.DRV. Using a nonstandard COMM.DRV can cause incompatibility.</b></p>	<p>In the [Boot] section of Windows SYSTEM.INI, change the line COMM.DRV= to COMM.DRV=COMM.DRV.</p>

Suspected Cause	Action
<p>Winsock errors that indicate Windows is having trouble connecting to a TCP/IP host. These errors appear in GoldMine only during synchronization via Internet, or when sending and retrieving Internet e-mail.</p>	<p>For details on correcting Winsock errors, see <a href="http://www.sockets.com/err_1st1.htm">http://www.sockets.com/err_1st1.htm</a>.</p>
<p>Modem does not dial.</p>	<p>Use the Windows accessory program HyperTerminal to test dialing.</p> <p>From the Windows task bar, select <b>Start</b>, select <b>Programs</b>, then select the <b>Accessories</b> program group. Select HyperTerminal. Click on any HyperTerminal session, which is represented by a folder with the extension .HT, such as COMPUSERVE.HT. The <b>Phone Number</b> dialog box appears. Select <b>Cancel</b>, which closes the dialog box, but leaves the HyperTerminal window open.</p> <p>To test dialing, type ATDT, then press <input type="button" value="ENTER"/>. You should hear a dial tone. To hang up, type ATH, then press <input type="button" value="ENTER"/>.</p> <p>If you do not hear a dial tone:</p> <p>Change the dial settings for the modem in the Windows Control Panel. Clicking on the <b>Modems</b> icon, then select the modem listed in the <b>General</b> tab, and changing the speaker volume.</p> <p>If the problem continues, check the phone line.</p>
<p>Modem hardware problems.</p>	<p>Test calling out with a known good modem.</p>

Suspected Cause	Action
<p><b>Incorrect modem settings in Windows Control Panel.</b></p>	<p>From the Windows task bar, select <b>Start</b>, then select <b>S</b>ettings. Open the <b>C</b>ontrol <b>P</b>anel, then select the <b>M</b>odem icon. The <b>M</b>odems <b>P</b>roperties window appears.</p> <p>Select <b>P</b>roperties.</p> <p>Select the <b>C</b>onnection tab. Check for the following settings:</p> <ul style="list-style-type: none"> <li>• Data Bits=8</li> <li>• Parity=none</li> <li>• Stop Bits=1</li> </ul> <p>Select <b>A</b>dvanced. The <b>A</b>dvanced <b>C</b>onnection <b>S</b>ettings window appears. Make sure that both <b>U</b>se <b>f</b>low <b>c</b>ontrol and <b>S</b>elect <b>H</b>ardware (<b>R</b>TS/<b>C</b>TS) are selected.</p>
<p><b>TAPI errors that are generated by Windows. Two common TAPI-related error messages that appear in the GoldMine Process Monitor:</b></p> <ol style="list-style-type: none"> <li>1. Makecall() error: Resource unavailable: <b>either another program is using the selected modem, or the modem is not responding.</b></li> <li>2. LineDealloc() error: Not owner: <b>another program is set to answer incoming calls on the selected modem. GoldMine is trying to answer the call, but finds the line is in use.</b></li> </ol>	<ol style="list-style-type: none"> <li>1. Exit the other program, or reset the modem.</li> <li>2. Exit the other program.</li> </ol>

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