What's New in GoldMine 6.5

FrontRange SOLUTIONS

GoldMine®

VERSION 6.5

11/03

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Introduction

Welcome to GoldMine 6.5

Welcome to GoldMine 6.5. GoldMine is a business contact management tool with sales force and marketing automation functionality for individuals and teams. With this new version, we have improved the efficiency and increased the automation of administrative tasks.

Getting started in GoldMine 6.5 is now easier than ever. The new conversion wizards help you import contact information quickly and easily so you spend less time setting up and more time completing your tasks.

GoldMine's enhanced real-time tracking, greater flexibility for customizing data capture, and new tools for collaborating with external team members or contacts enable you to meet your expanding business needs.

About This Document

What's New provides introductory information about the new features and enhancements included in GoldMine 6.5. For detailed information and step-by-step instructions, see the online Help.

Audience and Expertise

The information in this manual is written for GoldMine users and system administrators reviewing the new features and enhancements.

This material assumes the user has an understanding of the Microsoft Windows operating system.

Document Conventions

This document uses the following terms and syntax when explaining steps and procedures:

- Menu bar commands and the corresponding menu item are presented as **File>>Print**. This means you should select the word **File** on the menu bar, and then click **Print** in the drop-down menu.
- Dialog box, window, menu, and menu bar names begin with uppercase letters and are referenced in bold text when they are the result of an action. For example: "Click **OK**. The **Select a Data Source** dialog box appears." Bold text may also be used if needed for emphasis on the first mention of that item.
- Command buttons you click on-screen are referenced in bold text or pictured as they actually appear.

  Example: **OK** or 

- Tips are presented in the margins to provide users with alternative procedures or with suggestions for using the feature.
- Notes are presented with a line above and below the paragraph; the word **Note** always appears in bold text. Notes provide information to supplement or emphasize information in the text.

- Important Notes are presented with a line above and below the paragraph; the word **IMPORTANT** is always capitalized and appears in bold text. Important notes provide information essential to the text.
- Cautions are presented with the word **CAUTION** in all capital letters and bold text. Cautions alert users that failure to read and use information provided may result in data loss.
- Warnings are presented with the word **WARNING** in all capital letters and bold text. Warnings alert users that failure to read and use information provided may result in functionality and/or data loss.
- Cross-references are presented with a book icon . Cross-references inform users that related or additional information is available in another topic or manual.

GoldMine Resources

Documentation to help you understand and use GoldMine is provided in multiple forms and locations.

GoldMine Manuals

GoldMine offers the following manuals to help you get the information you need:

- **What's New in GoldMine:** This guide provides an overview of the new features of each release.
- **GoldMine Installation Guide:** This guide provides installation, setup, and integration instructions for GoldMine.

- **Using GoldMine:** This guide provides an introduction to the main features of GoldMine.
- **Administrating GoldMine:** This guide provides an introduction to the main concepts and features of GoldMine administration.

IMPORTANT: Manuals applicable to the subject application are available in PDF format from the **Installation CD-ROM** or **NetUpdate download** or to maintenance customers on our support Web site at **support.frontrange.com.**

Online Help

FrontRange Solutions provides an extensive online Help system. This convenient feature allows you to access step-by-step instructions, overviews, checklists, tips, notes, definitions, dialog box descriptions, and reference information without having to look past your computer screen.

You can access the online Help two ways:

To Access General Help

Select **Help>>Help Topics** on the main menu bar.

To Access Dialog Box Help

Press **F1** on the active dialog box or window.

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Corporate Headquarters:

FrontRange Solutions Inc.

(a Delaware corporation)

1150 Kelly Johnson Blvd.

Colorado Springs, CO 80920

TEL: 800.776.7889 and +1 719.531.5007

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CHAPTER ONE

1

What's New in GoldMine 6.5

Overview

The new features and enhancements available in GoldMine 6.5 are designed to support a variety of business processes while improving efficiency and automating administration.

This document is intended to provide you with general information about the new features in GoldMine 6.5. The features are not presented in any priority order. Rather, the information is designed to work with the online Help where in-depth information and step-by-step instructions are available. To access the online Help, select **Help>>Help Topics** or press **F1**.

For a detailed list of new features, changes, and fixes, select **Help>>Release Notes**.

Working in GoldMine

Taskbar

The GoldMine taskbar now supports text wrapping for the function labels, color changing during mouse-over, and automatic auto-scrolling through long lists when touching the bottom or the top of the taskbar with the mouse.

The ability to **Close** the taskbar was added. To close the taskbar, click the **X** in the upper right-hand corner. To reopen the taskbar after closing it, select **Window>>Taskbar**.

Drag-and-drop editing was also added, allowing you to move icons up and down the open taskbar or between taskbar groups.

Public Ownership of Groups

Groups can now be publicly owned and made accessible to everyone. Owning user lists for groups now include **(public)**.

Column Display Size

The browse columns in several areas of GoldMine now remember your individual column width preferences when displaying results. The areas include the Contact Record tabs, the Activity List, Opportunity and Project Manager tabs, and the Contact Search Center. The modified width settings are saved in Username.ini settings.

Working with Contact Records

Contact Search Center

The Contact Search Center's enhancements make it a more complete way to create and manage Filters, Groups, and SQL Queries. In addition to the new features, most of the functionality of the Filters and Groups dialog box has been made available in the Contact Search Center.

General Changes in the Contact Search Center

Toolbar

With new icons, the Contact Search Center has also been expanded to include the new functions discussed the "New Actions in the Contact Search Center" section below.

Display

Contact Search Center includes the name of the currently previewed filter or group on the title bar. The browse columns now remember your individual column width preferences when displaying results.

Tagged Records

If you selected and tagged records in the Contact Search Center, a new warning asks you to confirm that you want to release the records before you move on to another search or if you select another entry without using SHIFT or CTRL.

Saved Searches Local Menu

Right-clicking on a saved search in the tree pane expands quick access to the greater functionality discussed in the following section.

New Actions in the Contact Search Center

Filters

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

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

  You can optimize using the toolbar as you are building a filter or when previewing a filter.
- **New Filter dialog box:** A newly added dialog box creates a workflow that parallels the Group and SQL Query processes. You are prompted to provide a name and select the owning user.

Groups

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

- **Drilling Down:** Previewing groups may return more contacts than you want to work with initially. The Drill Down button allows you add criteria to a Previewed group, thus limiting your results.
- **New Group dialog box:** The newly added dialog box creates a workflow that parallels the Filter and SQL Query processes. You are prompted to provide a name and select an owning user.

SQL Queries

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

Contact E-mail Addresses

Autofilling E-mail Addresses

You now have the option to autofill all new e-mail addresses you add to the Contact Record with the domain name following @.

On the Contact Record, click the e-mail address. The **E-mail Addresses** dialog box appears. To activate the auto-fill option, first select **Primary E-mail Address** and then select **Auto-Fill with @<domain name>**.

The autofill option is controlled by `AutoFillEmailAddr=1` in the `[GoldMine]` section of your Username.ini.

Adding Notes

Adding notes to each e-mail address allows you to provide customized information you may need when communicating with the contact. On the **E-mail Addresses** dialog box, select an e-mail address and then type any relevant notes in the **Notes** text box.

Contact Web Addresses

Specifying Primary Web Sites

You can now select a primary URL for a Contact Record. On the Contact Record, click the Web site. The **Web Sites** dialog box appears. Select a Web site and then select **Primary.**

Notes

Adding notes to each Web site allows you to provide customized information you may need when working with the contact. On the **Web Sites** dialog box, select an e-mail address and then type any relevant notes in the **Notes** text box.

Working with Additional Contact Records

Autofilling Addresses

Are you tired of recreating the same address information for each company's additional contacts? You can now select autofill and GoldMine will use the address information from the primary contact to populate the address fields for the additional contact.

Right-click in the columns on the **Contacts** tab and select **New**. In the Address area select **Auto-fill with Primary Address**.

If you want this option always selected by default, you can update the `[GoldMine]` section of your Username.ini with `AutoFillAddlAddress=1`.

E-mail Merge Codes

Now you can capture e-mail merge codes for additional contacts when creating or editing the record. Right-click on the **Contacts** tab and select **New** or **Edit**. Add to or update the **E-mail Merge** field to the right of the E-mail field.

Added Menu Options

The **Contact** menu has expanded to include the **Add a Detail** and **Link a File** commands. These menu options provide a direct way to add a detail or a linked file to the active Contact Record without requiring you to right-click in the Details tab and Links tab to perform the same action.

The **Record Properties** menu option has been divided into a sub-menu. Select **Edit>>Record Properties>>Record-related Settings** to access the existing **Phone Formatting**, **Ownership**, and **Alerts** settings. Select **Edit>>Record Properties>>Contact Details** to access the existing **Occasions** settings and the new **Free/Busy** and **Digital IDs** settings.

Writing to Additional Contacts

You now have new options for additional contacts when using the default letter, fax, and memo configured in your Document Management Center.

Select either **Contact>>Write>>Letter to Contact**, **Memo to Contact**, or **FAX to Contact**.

If the contact has additional contacts, you are given the option to select from the additional contact list.

GoldMine E-mail

E-mail Message Local Menu Commands

Fast File and **Reply to All Recipients** commands—used to update a message as filed or to launch a reply e-mail message window—were added to the following local menus:

- Pending tab
- The Calendar's Day, Week, Month, and Outline views
- The Activity List's Open and E-mail tabs
- The Opportunity and Project Manager's Pending tab

E-mail Message Previewing

You have the option to show or hide the preview of e-mail messages in the E-mail Center. Right-click on the Online, Inbox, Outbox, Deleted, or Draft folders and select **Options>>Show Preview** to toggle the display on or off.

You can set this as the default in the `[Internet]` section of the Username.ini with the following command: `ShowPreview=1`.

Using Digital IDs with E-mail Messages

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

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

Configuring GoldMine User's Digital IDs

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

Configuring Contact's Digital IDs

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

Sending Digitally Signed E-mail Messages

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

Sending Encrypted E-mail Messages

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

Decoding Winmail.dat files

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

Working with Activities

Unlinking Activities

When you are scheduling an activity but do not want it linked to a contact, clearing the **Link to selected contact** option now removes the active contact's name from the Contact field.

Auto-Updating Activities

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

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

Sharing Free/Busy Times

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

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

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

Publishing User's Free/Busy Time

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

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

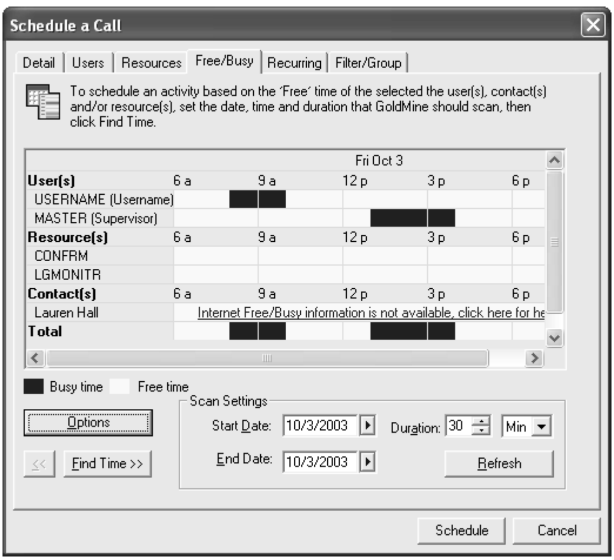
To publish your free/busy information, select **Tools>> Publish Calendar>>Publish Free/Busy Times**.

Using Contact's Free/Busy Time

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

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

To use the information when planning, schedule an activity, and in the **Schedule an activity** dialog box select the new **Free/Busy tab>>Options>>Show Contacts**. When you click OK, the contact's free/ busy times appears on the tab.



Publishing User Calendars in iCalendar or HTML

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

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

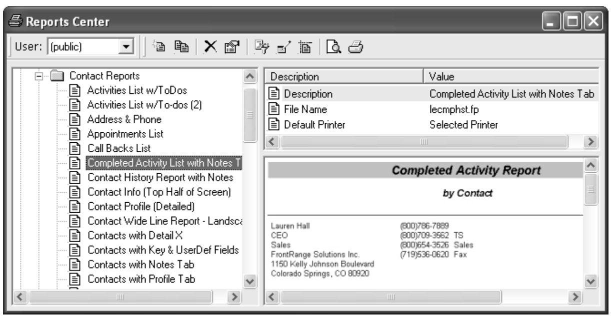
To begin publishing, you can use the Server Agents. Select **Tools>>Server Agents Administrator>> Calendar**. Configure the settings as needed and then start the Server Agents.

Reporting GoldMine Data

Reports Center

The new Reports Center has the look and feel of other GoldMine centers, making it easier for you to select your report, configure the properties, and then move to the layout if you need to make changes.

To launch the Report Center, select **File>>Customize Reports**.



The Reports Center has three panes. The first displays the available reports in a tree structure. The second displays the details regarding the file or report profile of the report you selected in the tree pane. The third displays a static .jpg preview of the selected report.

Note: The system reports do not have .jpg previews to display.

Toolbar

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

- **New Report**
- **Clone Report**
- **Delete Report**
- **Report Properties**
- **Report Sorts**
- **Report Options**
- **Edit Report Layout**
- **View Saved Report**
- **Print Report**

Local Menu

If you right-click on a report in the tree pane, you launch the Reports local menu which contains the following options:

- **Print**
- **Layout**
- **Options**
- **Sorts**
- **View Saved**
- **Find**
- **Output to**
- **New**
- **Clone**
- **Delete**
- **Properties**

Report Properties

The Report Properties dialog box now includes all the configuration settings that were previously in separate dialog boxes:

- **Profile:** The report description, file name, and printer.
- **Sorting:** The primary, secondary, and tertiary sort options for the current report.
- **Options:** The history, calendar, and linked data to include in the report.

Printing Reports

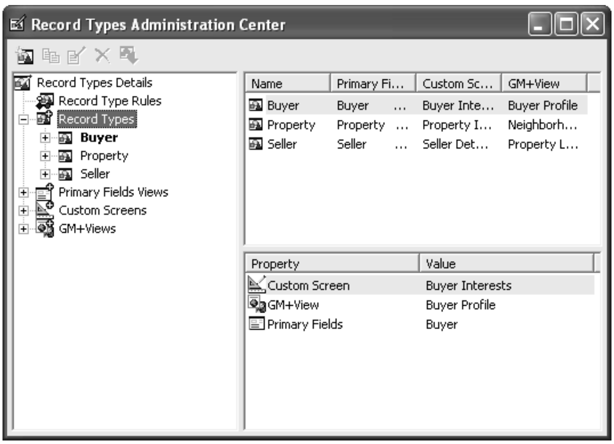
You can print reports from the new Report Center or by selecting **File>>Print a Report**. The new **Print Report** dialog box appears providing you with quick access to a preconfigured report based on Type, Category, and Report name without using the Report Center.

Customizing and Administrating

Record Types Administration Center

The Record Types Administration Center provides you with a way to create and manage your record typing customizations. By applying the idea of record typing, you can use the GoldMine Contact Records in a very powerful and dynamic way. In the broadest sense, record typing allows you to create many record types that display different fields, and then define the type of record GoldMine users see based on an applied set of rules. Record typing allows you to combine within one database what may seem to be disparate types of records.

To access the Record Types Administration Center, select **File>>Configure>>Record Types Administration Center**.



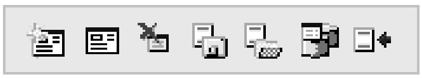
The Record Types Administration Center allows you to create many record types based on your different business model and the information your company tracks. You can then associate Primary Field Views, Custom Screens, and GM+Views and apply them in GoldMine based on your user-defined **Record Type Rules**. The full record type combination (Primary Field View, Custom Screens and GM+View) is referred to as an "entity."

As part of the record typing, you also determine your New Record Creation Options. The **New Record Creation Options** determine the fields displayed to a user creating a new record.

With various record types created as needed, you then create and apply the Record Type Rules. The rules govern what record type displays based on either a field value-based or dBASE expression-based rule. The rule can be something as simple as when the value in the Acct Type field is ***Vendor***, apply the ***Vendor*** record type which has a Primary Fields View, Custom Screen, GM+View, and New Record display that is different from the ***Customer*** record type.

Screen Design Toolbar

The Screen Design toolbar is expanded to include the **Save as New View** and **Load View** buttons. The buttons are part of GoldMine's expanded record typing. To launch the toolbar, right-click on a field label and select **Screen Design**.



Save As: Saves the current screen as a new Primary Field View.

Load: Loads the selected Primary Fields View.

Primary Fields Views

GoldMine has added a new method for creating a variety of different Contact Records and then saving them as different Primary Field Views.

The primary fields refer to the upper four panes of the standard Contact Record. Primary Field Views are a set of fields you create and design for specific user or business needs.

The best way to use the Primary Field Views is to open your main view or load another view in the Screen Design mode and then save it as a new view before you begin changing or editing the field type. Click the **Save as New View** button, then provide a distinctive name for the new view.

You use field typing to customize the look of field labels and values for your primary fields and user-defined fields. When customizing a set of fields, you can then save them as a View. This type of flexibility allows you to create custom views for different users or user groups. You can then select a view as part of a record type in the Record Types Administration Center.

To customize field types, right-click on the field label and select **Properties** from the local menu. The **Field Properties** dialog box appears. Select the **Profile** or **Color** tab as needed. The Profile tab holds the settings for the field label and field data. The Color tab holds the settings for the label color and field data color.

Changing Primary Fields Views

Your default Primary Field View is first determined by the defined rules in the Record Types Administration Center. However, users with the proper permissions can change their Primary Field Views. Right-click in the primary fields on a Contact Record and select **Select Primary Fields**. You can then select another view from the menu.

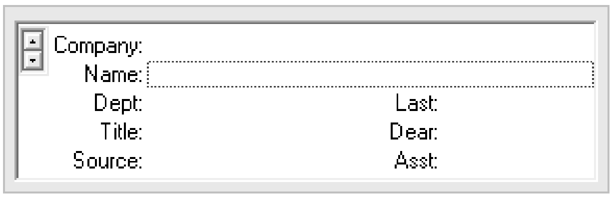
Required Fields

Assigning Required Data Entry status to primary or user-defined fields forces users to add data to the configured fields before they can move on to another record. It ensures data integrity on a Contact Record. If the user cannot provide information, an override option is provided. The override requires users to have authorization to override and to provide a reason. The override action and reason are added to the History tab of the Contact Record.

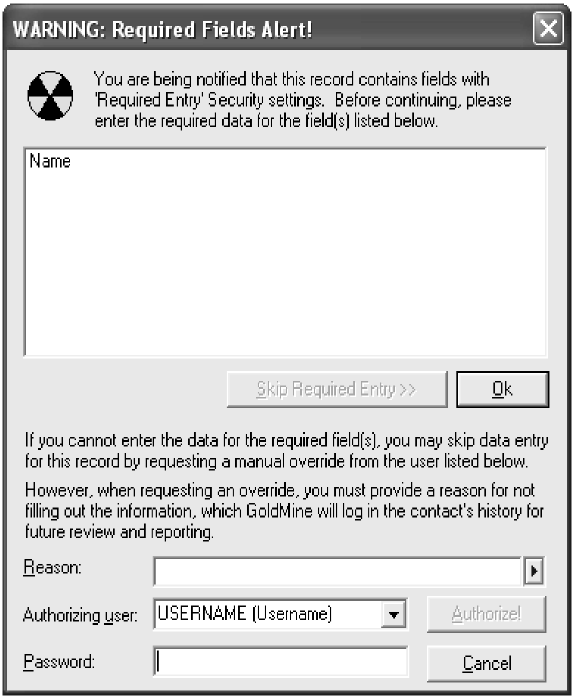
You force data entry on the **Field Properties>>Security** tab for the selected field.

A required field assumes (public) read and write access. To require data entry, users must have access to the field.

As a visual clue for users, a required field displays on the Contact Record with a red box around it.



If the field requires data and the user has neglected to provide data in the field, the **Required Fields Alert** warning appears allowing authorized users to override the requirement.



The Required Fields Alert appears when you are performing one of the following actions without providing data:

- Creating a new Contact Record
- Scrolling to a different Contact Record
- Switching to a new View or Custom Screen

When a required field is overridden, an Override activity is added to the associated History tab with an Activity code of Override. The record is not removed when the field is updated and can only be deleted by a user with Master rights. If a required field is not completed due to a system failure—for example, the computer unexpectedly shuts down—an Audit New activity is added to the History tab.

Color Name Support

Instead of selecting a color from the color palette or requiring you to know the numeric code for a color when using color in an expression, GoldMine field typing now supports the following color names:

- Black
- White
- Invisible
- Red
- BrightRed
- Blue
- BrightBlue
- Green
- BrightGreen
- Gray
- DarkGray
- Yellow
- BrightYellow
- Purple
- BrightPurple
- Orange
- BrightCyan
- Default

ACT! Conversion Wizard

To facilitate your transition from ACT! to GoldMine, a new ACT! Conversion Wizard is added. The Conversion Wizard can detect and convert ACT! 6.0 Contact Groups, Linked files, and Sales/Opportunity conversions.

To access the wizard, select **Tools>>Import/Export Wizard>>Convert from ACT! 6.0**.

Note: The conversion of previous versions of ACT! is still supported in the Import Wizard.

Outlook Conversion Wizard

Recognizing that many people are moving from Outlook—a basic e-mail client and address book software—to GoldMine because it offers a much more powerful contact management system, GoldMine offers an Outlook Conversion Wizard to convert data from Outlook 98 and higher. The Outlook Conversion Wizard helps you determine the Outlook Contact folders, Calendar folders, Task folders, and E-mail folders you want to import into GoldMine. As part of the wizard, you can set the phone format, specify a default user for the imported calendar and history records, and decide whether or not to import duplicates or just import all contacts into GoldMine.

To access the wizard, select **Tools>>Import/Export Wizard>>Convert from Outlook 98 and higher**.

GoldMine Link for Office

The new GoldMine Link for Office now installs integration with both Word and Excel. The installer includes signed certificates. The GMLinkInstaller is now included with the GoldMine gm6setup.exe installation file.

The installer does not include the Microsoft Data Access Components (MDAC) files which can be downloaded from Microsoft or installed from the Microsoft Office installation CD.

GMLink for Excel

The GoldMine Link for Excel installs a GoldMine menu on the Excel menu to access the two integration functions. The first, **Export Data to GoldMine**, offers easy field mapping options to export your Excel database directly into GoldMine. The second option, **Insert GoldMine Field**, provides you with a list of GoldMine fields and selected macros that you can map to Excel cells. The field mappings remain dynamically linked to the GoldMine fields, changing to reflect the values in the currently active GoldMine Contact Record. For example, you can create a billing form in Excel and insert the appropriate name, address, and user-defined fields. Then you can use the integrated form to generate a printed bill for a customer.

Synchronization

GoldSync as a Service

Adding the option to run GoldSync as a Service provides added security by eliminating the need to log onto the computer to start GoldSync. It also saves administrative time since the GoldSync Service can be configured to restart whenever the operating system on the computer starts rather than requiring someone to manually start the GoldSync Service.

The GoldSync Administration Center toolbar is expanded to include three new buttons to install, uninstall, and configure the GoldSync Service.

Instant Sync

Using the new Instant Sync offers an automated way to keep undocked users up to date with their synchronization whenever they connect to the network.

Using Instant Sync requires a GoldSync server running on the network. The configuration is part of the Site profile on the GoldSync server and is included in the undocked computer's One-button Sync profile.

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