

Author:

DJ Hunt



In This Book

Dashboards

Users' & User Groups

User Options

User Defined Fields

F2 Lookup List

The Lookup.ini

Gathering the Data

The Tables

WebImport™

Automated Processes™

GM+View/GM+Browser

GoldMine Report Writer

MS SQL Server 2008®

GoldSync®

Leads Management Center

The Opportunity Manager

The Service Center

Appendix A

Appendix B

G ₂		S,		I,					
M ₃		Q ₁₀		N,					
V ₄		L,	O,	O,	K ₅	U,	P ₃	I,	N,
I,									I,
E,				P ₃				U,	
W ₄	E,	B ₃	I,	M ₃	P ₃	O,	R,	T,	
S,					O,				
					R,			P ₃	
C ₃	U,	S,	T,	O,	M ₃	E,	R,	S,	
					U,			O,	
T,				N,				C ₃	
A,				I,				E,	
B ₃			T,					S,	
G ₂	O,	L,	D ₂	S,	Y ₄	N,	C ₃	S,	
	E,							E,	
D ₂	A,	S,	H ₄	B ₃	O,	A,	R,	D ₂	S,

GoldMine Premium - The Definitive Guide

Copyright© 2011 Computerese, DJ Hunt

All Rights Reserved
United States of America

150 Pratt Road
Fitchburg, MA 01420

Voice: (978)342-3333
E-Mail: DJ@DJHunt.US
Website: www.DJHunt.US

GoldMine Premium - The Definitive Guide

No part of this book may be reproduced, stored in a retrieval system, or transmitted in any form, or by any means, electronic, mechanical, recording, or otherwise, without the prior written permission of DJ Hunt. Please note that the content in this book is protected under copyright law even if it is not distributed with software that includes an end-user license agreement.

Your purchase of Goldmine Premium - The Definitive Guide does not constitute transference of these rights to the purchaser.

The content of this book is provided for informational use only, is subject to change without notice, and should not be construed as a commitment by DJ Hunt. DJ Hunt assumes no responsibility or liability for any errors or inaccuracies that may appear in the information content contained in this book.

Please remember that existing artwork or images that you may want to include in your project may be protected under copyright law. The unauthorized incorporation of such material into your new work could be a violation of the rights of the copyright owner. Please be sure to obtain any required permission from the copyright owner.

Any references to company names in sample templates are for demonstration purposes only, and are not intended to refer to any actual organization.



Trademark Acknowledgements

GoldMine software is Copyright ® FrontRange Solutions USA Inc. All Rights Reserved. GoldMine® and other FrontRange Solutions products, brands and trademarks are property of FrontRange Solutions USA Inc. and/or its affiliates in the United States and/or other countries.

GoldSync, Automated Processes, WebImporting, and InfoCenter are trademarks of FrontRange Solutions

Microsoft Word, Microsoft Office, Microsoft Excel, SQL Server are trademarks of Microsoft Corporation

All other trademarks are the property of their respective owners

The Author



GoldMine for Window, 1992
Getting the Gold out of GoldMine, 1995
Sales Force Automation with GoldMine 4.0, 1999
The Hackers Guide to GoldMine, 2003
The Hacker's Guide to GoldMine 6.5, 2004
The Hacker's Guide to GoldMine 6.6, 2004
The Hacker's Guide to GoldMine 6.7, 2004
The Hacker's Guide to GoldMine 7.0 - A New Beginning, 2006
The Hacker's Guide to GoldMine Premium, 2008
GoldMine Premium - The Definitive Guide, 2011

Many GoldMine Partners are using these books as their GoldMine bibles for Technical Consultation. Most readers will have found my free advice in the forums to be helpful, or you may have used some of my 300 or so GoldMine add-on products. Beyond Gold had become a very popular free utility add-on for GoldMine in the beginning, though I was first recognized for my GoldQuote add-on. I am currently working for Computerese Inc, and working there as an GoldMine Consultant doing GoldMine Support worldwide. Not only do I speak the GoldMine rhetoric, but I can do the GoldMine dance as well.

Alas, **GoldMine Premium - The Definitive Guide** is to be my 10th and final book as I have plans to retire to become more of a part time GoldMine contributor by April 2012. I thank everyone for their kind words and accolades for my various books over the years, and I hope that you will enjoy this one just as much.

Ad Hoc Editors & Contributing Authors

I would like to thank all of those who have contributed to this book through their suggestions, and actual editing of the content of the book. Without whose assistance this book would not be going out to you as accurate, and clean as it now stands.

Special appreciation goes out to:

Carol Hunt (aka the Spouse)
Iain Wicks (Chapter 1 - Contributing Videographer)
Andrea Dominquez (Chapter 12 - Contributing Author)

Table of Contents

Chapter 1 - Dashboards	1
New Dashboard... -----	2
Component Binding -----	7
Changing Default Dashboard Properties -----	10
Data Source -----	11
Creating a New Dashboard -----	18
Linking Dashboard Records to Contact Records -----	20
Manually Typed Data Sources-----	21
Pivot Table -----	23
Chapter 2 - Users' & User Groups	27
Users' Settings -----	27
User Groups -----	35
Resources -----	36
License Manager -----	38
Chapter 3 - User Options	41
Personal -----	42
Record -----	43
Calendar -----	47
Schedule -----	55
Alarms -----	57
Lookup -----	59
E-mail -----	62
Telephony -----	78
Pager -----	80
System -----	81
Speller -----	83
Login -----	84
Global System Settings -----	85
GUIless Ini Statements -----	88
GM.ini -----	92
Chapter 4 - User Defined Fields	97
Custom Fields -----	97
Custom Screens -----	99
Screen Design -----	100
Record Typing -----	107
Chapter 5 - The F2 Lookup List	115
The Basics -----	115
Referential Lookup List -----	118
Code-based -----	119
Text-based -----	121
Products -----	123
Multicast Gold -----	124
Goldbook -----	124

Chapter 6 - The Lookup.ini	127
The Basics - - - - -	127
Updating Fields - - - - -	128
Emulating Radio Buttons - - - - -	129
Rotationally Assigning Leads to Representatives - - - - -	130
Last Name Conversion - - - - -	132
Running External Applications - - - - -	134
Playing Macros - - - - -	136
Color Coding Calendar Activities - - - - -	137
Generating Your Own Unique Identifier - - - - -	138
Record Typing (Another Approach) - - - - -	138
Currency Formatting - - - - -	139
Lookup.ini Razzle - Dazzle - - - - -	140
GMTray - - - - -	145
Chapter 7 - Gathering the Data	147
Filters - - - - -	148
Preview - - - - -	150
SQL Queries - - - - -	151
Groups - - - - -	162
Record Tagging - - - - -	166
Relationship Tree - - - - -	167
Chapter 8 - The Tables	169
Contact1 - - - - -	170
Contact2 - - - - -	172
ContUDef - - - - -	173
ContHist - - - - -	174
ContSupp - - - - -	175
Record Alert	175
Add'l Contacts	176
Automated Process Tracks	176
Headers	177
Linked Documents	177
Relationship Tree	178
E-mail Address	179
Website	180
Detail	181
Referral	182
Version	183
ContGrps - - - - -	184
Cal - - - - -	185
Appointments, Calls, Other Actions, Next Actions	186
Occasion	188
To-Do	190
Event	191
Literature Fulfillment	193
Holiday	195
E-mail, Queued Email Messages & Quotas	197
Forecasted Sales	199
Mailbox - - - - -	201
Cases - - - - -	204

Chapter 9 - WebImport	207
GM.ini -----	208
Contact_Info.html -----	209
Process.asp -----	209
E-mail Rule -----	213
WebImport - Script Generator -----	213
DJ's Registration WebImport -----	219
Chapter 10 - Automated Processes	223
Definitions -----	223
The Observer Process™ -----	224
Create a Filter/Group Historical Activity -----	228
Triggers -----	230
Actions -----	233
Tid Bits -----	241
Wrap Up -----	242
Chapter 11 - GM+View/GM+Browser	245
Rules -----	246
Templates -----	247
Pushing Information-----	255
Linked Pictures -----	255
External Tables -----	258
Internet Information Services (IIS) -----	258
Scripting -----	260
Chapter 12 - GoldMine Report Writer	265
Printing a Report -----	265
The Report Center -----	266
Existing Reports -----	268
Contact Reports	268
Calendar Printouts	269
Service Reports	270
Analysis Reports	270
Labels & Envelopes	271
Other Reports	272
Customizing Reports -----	272
Sort Levels	272
Options	272
Cloning vrs Creating New Reports	273
Filtering	274
Formulas & Expressions	275
Graphics	281
Report Example -----	282
Contact List Report	282
Chapter 13 - Microsoft SQL Server 2008®	287
About SQL Server 2008 -----	287
Server Properties -----	288
Database Properties -----	301
SQL Server Maintenance Plan for GoldMine -----	311
Conclusion -----	322

Chapter 14 - GoldSync®	323
GoldSync.ini-----	323
Linked Documents	323
Timeouts	324
GoldSync	325
GoldSync Service	325
GoldSync Server-side-----	326
Initial Remote-side TSets-----	337
IP Address -----	339
GoldSync Remote-side-----	340
Whitepaper-----	345
Chapter 15 - Leads Management Center	353
Import Leads into GoldMine-----	353
Assign a Source Code-----	354
Analyze Leads-----	355
Assign a Merge Code-----	356
Assign an Owner/Manager-----	357
Assign an Automated Process-----	358
Schedule an Activity-----	358
Organize Filters and Groups-----	358
Chapter 16 - The Opportunity Manager	361
The Opportunity Manger-----	361
Configure the Opportunity/Project Manager-----	362
Opportunity Templates-----	364
The Wizard-----	366
Chapter 17 - The Service Center	371
About the Service Center-----	371
Templates-----	372
Customize-----	374
A Process-----	376
KnowledgeBase-----	378
Appendix A	381
Character Functions-----	382
Numeric Functions-----	388
Date Functions-----	390
Miscellaneous Functions-----	394
Appendix B	397
Macros-----	397

