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GM.ini

Here is yet another instance where FrontRange has made changes to the GoldMine as we knew it. No longer are these called User Preferences, instead, we now call them User Options. These Options can now be accessed via **Tools** | **Options** selection from the GoldMine menu or from the more readily accessible Standard Toolbar **Options** button.

When an individual is added to GoldMine as a user, the GoldMine Administrator assigns that user certain rights, and capabilities while using the GoldMine product. Beyond that, however, the user may control their own GoldMine environment. These environmental settings are stored in an ini file that resides in the main GoldMine folder, and is preceded by the GoldMine login UserID name created by their GoldMine Administrator. In Example: a GoldMine login name may be DJ, therefore, the related initialization file would be **DJ.ini**, and would reside in the main GoldMine folder. Be careful not to confuse this with **DJ.tbi** which contains the **Taskbar** settings for this UserID. The actual ini file with basic content will not exist in the main GoldMine folder until after said user has logged into GoldMine for the first time. Once the ini is created, it will be modified each time the user exits GoldMine, or, as we will discuss here, as the user makes changes to their **Options**. It is important, therefore, that the GoldMine Administrator does not set the properties of this file to **Read Only**, as we have seen done in some organizations, unless the GoldMine Administrator deems it necessary to not allow the users to make permanent changes to their UserID.ini files. There is no way to prevent the user from making temporary Option changes which are maintained in memory during any active GoldMine session.

I would like to note that the UserID.ini no longer contains all of the default settings as well as user selected options. In fact, it only posses the bare minimum of information upon initialization, and some of that, the **[Background]** section, does not even function with the GoldMine Premium Tabbed or Windowed environment.

```
[Exclusions]
Classic=0
Hash=527
Full=133_140_141_146_154_156_164_297_320_722_

[GM_SEARCH_CENTER]
SyncContact=0
DefField=0
SyncDelay=2
LookByShrink=0
SelectAction=0
FindUSAPhone=1
GM_SEARCH_CENTER=1

[Background]
LogoPosition=RB
LogoMargin=8,10
TextPosition=RB
Background=C:\Program Files\GoldMine\backtile.bmp
BackgroundPosition=TILE
LogoMask=47,79,136
Text=<gm_welcome>
TextFont=Arial
TextHeight=32
TextBold=1
TextColor=234,186,21
init_user=1
TextItalic=1
TextMargin=46,24

[ContactListColInfo]
ColumnHeaderState=ver2;40;COMPANY;1;-1;0;0;40;CONTACT;2;-
1;0;0;25;PHONE1;3;-1;0;0;50;[];4;-1;0;0;20;STATE;5;-1;0;0;20;ZIP;6;-1;0;0;
FilterEnabled=0
SummaryEnabled=0
GroupEnabled=0
```

```
[Warning]
ShowTipOfTheDay=1
```

You will also find that the UserID.ini body, itself, has changed as it now incorporates both straight initialization strings as shown above, as well as a single, albeit humongous, XML string which I hope to discuss briefly later in this chapter.

Personal

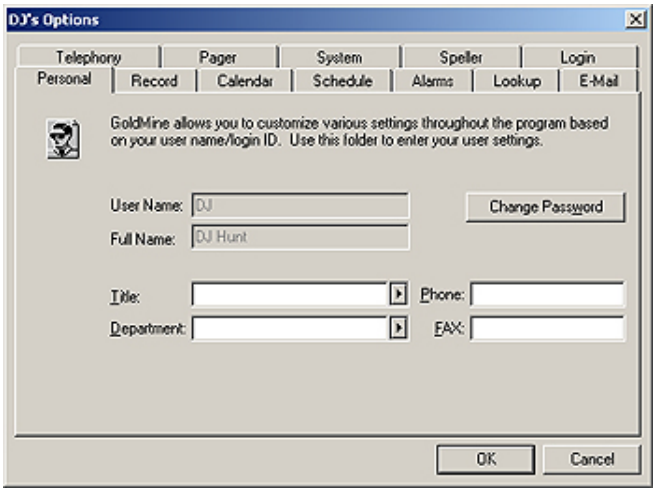


Figure 3-1

Tools | **Options** selected from the main GoldMine menu will produce the GUI (Graphical User Interface) portal to the UserID.ini settings. The first, or **Personal**, tab of this dialog form is shown in Figure 3-1.

One should immediately notice that the **User Name:** field, and the **Full Name:** field are disabled. The GoldMine Administrator added these to GoldMine Premium, and the user does not possess the ability to make changes to either of these two fields. In fact, once added, even the GoldMine Administrator is only permitted to change the Full Name: value, and not the User Name: value. Should the user desire that their full name be changed, as the users full name does appear as displayed here in their document templates, e-mail templates and reports, the user would need to request that their GoldMine Administrator or a UserID login with Master Rights make this change for them. If the user wishes to have their UserID as well as their full name changed, then the GoldMine Administrator would be required to Clone the existing UserID in order to make the changes. The GoldMine Administrator would then be required to do a Territory Realignment before deleting the old UserID.

The remaining four fields add information about the user that may also be used in document templates, e-mail templates as well as reports. This information in stored in the UserID.ini under the section heading of **[User_Var]**. We'll discuss more on this shortly, and there are GoldMine macros specifically created to utilize this data (see Appendix B). It is here, through this GUI, that the user should add their **Title:**, **Department:**, **Phone:**, and **Fax:**. Once this has been accomplished, these user variables would, hence forth, be available for use in document templates, and e-mail templates, as well as in reports. The UserID.ini, at least the section populated by this dialog form tab, might look like the section shown here:

```
[User_Var]
Title = Owner
Dept = Support
Phone = (978)342-3333
FAX =
```

To employ any of these variables in an e-mail template, or a document template, **Title** for example, it is simply a matter of adding the GoldMine macro which is something like **<<&User_Var.Title>>** at the appropriate position in the template.

Although this GUI will only allow the user to add the four user variables mentioned, one may open the specific UserID.ini using Microsoft NotePad and add, by hand, as many other user variables as they would have a need to use in a document template, an e-mail template or in reports. There is no documented limit to the number of user defined variables that one may add by hand, although there is a functional limit to the size of the UserID.ini file itself. Here is an example of what that section might look like for someone else.

```
[User_Var]
Author = Author: GoldMine – A Technical Guide
Author2 = Author:  Sales Force Automation with GoldMine 4.0
Certification = GoldMine® Certified Professional - GoldMine 5.0
Certification2 = GoldMine® Partner
EMail = DJ@DJHunt.US
FAX =
Phone = (978)342-3333
Title = Owner
Dept = Application Development
URL = www.DJ-Hunt.com
```

Note

*Please make note that the **[User_Var]** information is not self formatting, and will appear in your templates exactly as it is entered here, hence, it is incumbent upon your users that they enter the information in a formatted manner consistent with your corporate policies on the matter.*

Tip

*Even though the **[User_Var]** section via the GUI only permits 4 variables, using Notepad, the GoldMine Administrator or GoldMine User with permission may add as many more variables as they need like:*

Email=DJ@DJHunt.US

These variables, like the others, will then be accessible as mergible values in all Document & E-mail templates.

If you have Corporate variables that would be generic to everyones templates, then you may want to consider doing a Corporate Override via the GM.ini as discussed later in this chapter. In Example:

```
[User-OverRide:User_Var]
Company = Computerese
Address1 = 150 Pratt Road
CSZ = Fitchburg, MA 01420
```

Note

*Even though this dialog form is presented to the end user via the Options GUI, this value is **not** stored in the UserID.ini. This value is encrypted, and written to the Users table.*

Reverting back to Figure 3-1 on the previous page, you will notice that there is a button to **Change Password**. By clicking on this button, the user is presented with the dialog form shown here in Figure 3-2.

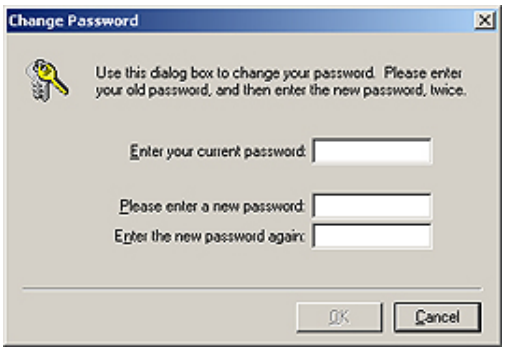


Figure 3-2

This affords the user the opportunity to change their password at any time that they feel it would be appropriate. This is in contrast to the setting that the GoldMine Administrator controls, while creating a new GoldMine user. That is where the GoldMine Administrator would set the users **Valid for days:** password value. This option allows the user to change their password as frequently as they desire.

Note

*Contrary to common belief, the GoldMine UserID Password **is not** case sensitive. For that matter, neither is the UserID Login.*

Once the user types anything into the **Enter your current password:** field, the **OK** button will become active. Once the user has entered their current password, they are then requested to **Please enter a new password:**, and then to **Enter the new password again:**. This is Standard Operating Procedure (SOP) to assure that the user has entered their password as they expected it to be entered, a cross check so to speak. Wisely, the coders at FrontRange have disabled the Copy & Paste functionality of these two fields. Once finished, the user clicks on the **OK** button to have the new password saved for future logins. This will occur if, and only if, the user has entered their current password correctly. If the user does not have a current password, simply leave that field blank. As well, if the user wishes to have no password, leave the two new password fields blank.

Record

Staying on the same row of tabs, and moving to the right, one tab, we now find ourselves on the **Record** tab, Figure 3-3. It is in this tab that the user may set their options as to how they wish to have GoldMine displaying the contact record. On this tab there are three frames of options. There are the **Appearance**, the **ZIP/Postal Code Validation**, and the **Contact Window Title** frames.

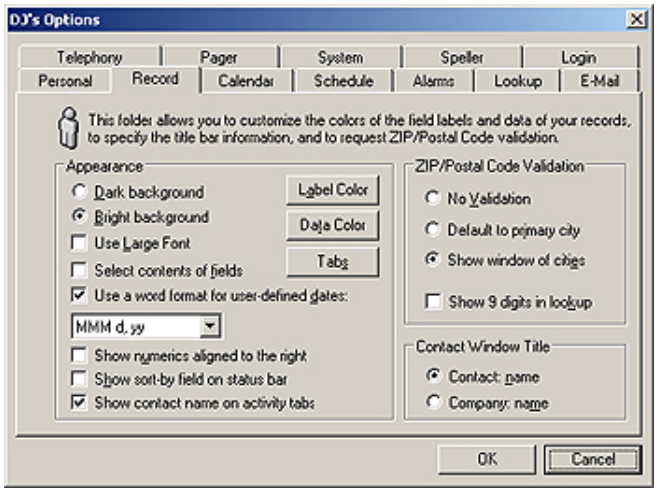


Figure 3-3

I'll look at the **Appearance** frame first, and in this frame, the first option grouping is a radio button selection option. As GoldMine is not consistent in their usage of the radio button selection option, I will explain when GoldMine does not follow the Windows standard for the usage of the radio button selection option. In this case, GoldMine does follow that standard, hence, only one radio button may be selected. The default is ◉ **Bright background**, which uses the Display Properties color of the Window, as defined through the users Microsoft Windows Control Panel, as the background color for the contact record. In most cases this will be the color white. Should the user decide to move away from the default, and to select ○ **Dark background**, then their background will appear in the same color as is showing on the edges of their options dialog form. This color may be gray in an older version of the Windows operating system, or tan in the Windows XP operating environment. In my Windows Vista Ultimate this dark color is a very light grey. This setting is stored in this section of the UserID.ini file.

```
[GoldMine]
;DarkBkGnd=0
DarkBkGnd=1
```

It is a little deceiving in that there is no entry in this section for the default option, and the above entry is only stored in the UserID.ini file when one chooses to use a dark background. However, I would mention that you may change the **1** to a **0** directly in the UserID.ini using Microsoft NotePad, and the user will again have a bright background (see Remarked out statement above preceded with a semi-colon (**;**).

The next item that a user may toggle is whether or not they wish to ☐ **Use Large Font**. I should make it clear that the user is only toggling between the use of the Microsoft Windows registered Small Font, and the Microsoft Windows registered Large Font. GoldMine, itself, does not allow for the manipulation of the fonts with one exception that will be discussed in a moment. The default set-

ting for this switch is **0** (not checked), which means that GoldMine is using the Microsoft Windows, registered, Small Font. As with the light or dark background, nothing appears in the UserID.ini section for the default option, however, should the user select to use the large font, the section would now look like this:

```
[GoldMine]
;LargeFont=0
LargeFont=1
```

In prior versions of GoldMine the:

```
[GoldMine]
BoldFont=1
```

...initialization statement had functioned as indicated. FrontRange has removed this functionality in the GoldMine Premium release that I am currently utilizing to write this book against.

Tip

Remember to use Microsoft Windows NotePad if you plan on manipulating the UserID.ini by hand.

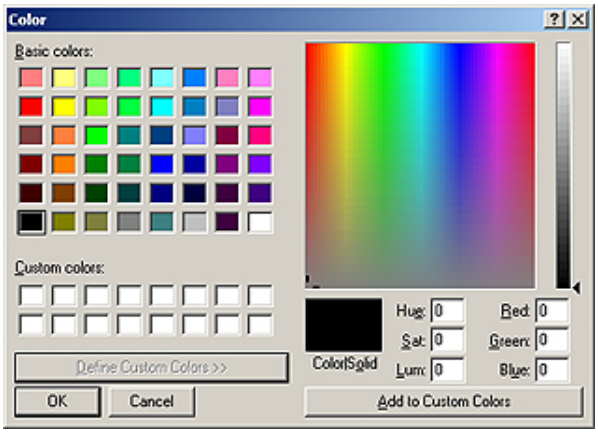


Figure 3-4

Before I continue on with the checkbox option switches, I would like to review the buttons that are available. The first button is the **Label Color** button. Clicking on this button produces the selection dialog shown in Figure 3-4. Obviously Figure 3-4 would be more representative in the printed version of this book if it were printed in color, however, for those of you reading the printed version, if you could just refer to the dialog form on your screen in GoldMine Premium you should be able to understand better what I am about to discuss with you.

Tip

Custom colors are not sticky. If you create 16 different custom colors, they will not be there if you change your mind, and wish to use another custom color. Only define what you want for the one instance.

This selection dialog will let the user choose a default color for all of the labels on their GoldMine Contact record from any of the 48 predefined colors. If the user does not like any of the predefined colors for their labels, they may use the GUI color palette to create up to 16 **Custom colors:** from which to choose a label color.

To select a color, one clicks on the desired color, and selects the **OK** button.

The next button, **Data Color**, will bring up the same dialog, as shown in Figure 3-4, from which the user may choose a default color for all of the data items on their GoldMine Contact record.

Color settings have their very own section in the UserID.ini. This section is not available until after the user has made a change to the default settings. Once a change has been made, however, the section with the appropriate settings will become available in the UserID.ini.

```
[Colors]
DataColor95=8388608
LabelColor95=0
```

Note

Datacolor95 *and* ***LabelColor95*** *are legacy properties that have been incorporated into GoldMine since the product first made its entry into the Windows environment. The property name has never been updated, hence the* ***95*** *attribute assigned to each label for* ***Windows 95****.*

Okay, answer this: How long should anyone honor Legacy products?

Criminey, GoldMine Premium was written to be a Windows Vista product.

The last button, **Tabs**, will produce a dialog form that will allow the user to manipulate the GoldMine tabs. Remember that in GoldMine Premium we have the capability of intermingling the tabs regardless of their type. No longer are the tabs constrained to two separate groups of tabs. Additionally, and new to this edition of GoldMine Premium, no longer can the average user control their own tabs order or names. This button is only enabled for the UserIDs with Master Rights.

In Figure 3-5 on the next page, you will notice that all of the GoldMine tabs are listed (you would need to scroll down the list to see the user-defined tabs). As a comment, I feel that the control over which tabs show, or do not show, and in which order, should reside with the GoldMine Administrator. If a corporate standard is to be set, the GoldMine Administrator must go into each users preferences, and change the tab settings on an individual basis. Today, we can manipulate these tabs for the corporate environment using a User Override which I will discuss later in this chapter under the GM.ini section. The User Override lets the GoldMine Administrator apply a standard for the corporation, and I highly recommend that you develop a standard for your organization. In fact, in this edition of GoldMine Premium, for the Tabs, the User Override can be accomplished directly from within the GUI. I will discuss this in a little more detail in a minute, however, I did want to mention that I think that this is yet another advancement within GoldMine in a positive direction. As you continue on in this book, I think that you see many of these for this edition of GoldMine Premium.

Having said that, and without a User Override, the GoldMine Administrator will have to modify the individual UserIDs Tab settings by modifying the UserID.ini within NotePad. Those UserIDs possessing Master Rights may modify their own Tabs directly, or the Tabs for the corporation via a User Override. Each of the tabs is presented in a list format with the checkbox option box preceding it. A check in any of the boxes means that those tabs will be displayed, while one eliminates the check to remove the tab from their display.

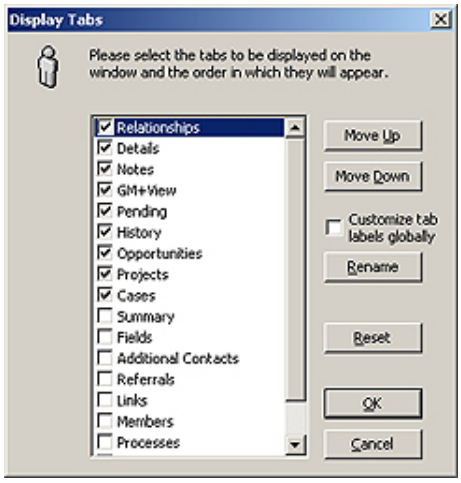


Figure 3-5

To reposition a tab, one clicks anywhere to the right of the tab name that is to be moved, which selects the tab item, and then clicks on the **Move Up** or **Move Down** button, whichever is appropriate. Should one change ones mind, and want to easily restore the defaults, simply click on the **Reset** button at any point during the operation. Doing this will turn all of the default tabs on, and reposition them back to their default position.

Once finished with the arrangement, the user clicks on the **OK** button to write these settings to the UserID.ini. Clicking on the **OK** button creates a new entry in the UserID.ini file as shown on the next page.

```
ROTabItemsOrder=g14;g5;g3;g2;g7;g8;g12;g13;g15;
ROTabItemsHidden=g0;g1;g4;g6;g9;g10;g11;pPC;pPart&ner;
ROTabs1=&Summary,&Fields,GM+&View,&Note,Additional  &Contacts,&Details,&Referrals,&Pending,&History,&Links,&Members,Pr&ocesses,Opport&unities,Pro&jects,Relati&onships,C&ases,Tic&kets

[User-Override:GoldMine]
ROTabsGlobalCheck=0
```

Of course, you could always click on the **Cancel** button to abandon all of your changes should you be dissatisfied, and want to begin a new.

New to this edition of GoldMine Premium is the User Override via the GM.ini. You may have noticed the new option checkbox to ☐ **Customize tab labels globally**. With this addition, GoldMine has adapted the GUI to initiate a User Override which, until this edition of GoldMine, has always needed to be accomplished external to the GoldMine application. When a logged in UserID has Master Rights, they will be able to check this box, and modify that tabs corporate wide. This User Override will be discussed later in this chapter in more detail. At this juncture, let's just say that the selection of this option could add something of this nature to the GM.ini as opposed to the UserID.ini:

```
[User-Override:GoldMine]
ROTabs1=&Summary,&Fields,GM+&View,&Memoranda,Additional  &Contacts,&Details,&Referrals,&Pending,&History,&Links,&Members,Pr&ocesses,Opport&unities,Pro&jects,Relati&onships,C&ases,Tic&kets
ROTabsGlobalCheck=1
```

With this edition of GoldMine Premium, we also see the addition of a new button which provides you the ability to **Rename** a tab. In this particular case, I had highlighted the Note label name prior to clicking upon the **Rename** button to produce the dialog form shown here in Figure 3-6. Simply enter the new name for this Note tab label (see sidebar Tip), and click upon the **OK** button. You will have changed the name of the Note tab to what ever you had decided upon, and, if the ☐ **Customize tab labels globally** option were selected, you would have made this change corporate wide.

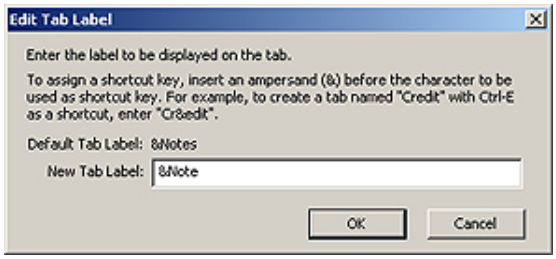


Figure 3-6

Each of the remaining items in the **Appearance** grouping are checkbox option settings, and are either On (if checked), or Off (if unchecked) except for the one drop list box used for selecting a word date display format.

☐ **Select contents of fields**, which, in the default state, is unchecked, allows the user to set the cursor entry type into a field that is activated in the edit mode. By default, when one places a field in the

Note

*An **&** in the tab name indicates the hot-key that a user could keyboard in to quickly advance to the tab, and in GoldMine Premium it is no longer displayed in the Display Tabs dialog form. However, rest assured that the hot-key still works in GoldMine Premium.*

Tip

*As in the past, you may still utilize the **&** hot key marker, however, it is your responsibility to assure that the marker is unique to your system otherwise you may think that you have a hot key that points to this tab when, in point of fact, you have a hot key pointing to somewhere else in GoldMine.*

edit mode, the cursor (I) is positioned at the beginning of the field. If text existed in the field already, and one were to begin typing, that text would be pushed to the right. On the other hand, should the user select this option, and upon entering the edit mode, the cursor would select everything in the field. Any editing to the field, at this point, would cause existing information to be overwritten.

☑ **Use a word format for user-defined dates:**, which, by default, is checked, allows the user to display user-defined date field information in words as opposed to numbers when viewed on the GoldMine screens. Therefore, with the default setting, a user-defined date field would be displayed as MMM d, yy or Nov 23, 48. Should the user change this setting, the date would then be displayed as 11/23/1948. The user may set different word date formats (masks) by choosing a format in the drop list box. The various formats, and the resulting display, are shown here:

MMM d, yy	**Nov 23, 48**
MMMM dd, yyyy	**November 23, 1948**
d MMM yy	**23 Nov 48**
d. MMM yy	**23. Nov 48**
dd MMMM yyyy	**23 November 1948**

☐ **Show numerics aligned to the right**, which, by default, is unchecked, again pertains to how user-defined field information is displayed on the GoldMine screens. This particular setting pertains to the display of user-defined fields having a specific data type of numeric. By default, all data is left aligned on the display. Sometimes, especially when numeric fields are aligned in a column mode, one would desire to have them aligned to the right. Unfortunately, it is all or nothing. Either all user-defined numeric data type fields are right aligned, or all are left aligned. Again, the default, unchecked, is to be left aligned, and it would be up to the user to force the right alignment by checking this option. A User Override would work as well, and force a Corporate Standard.

☐ **Show sort-by field on status bar**, which, also by default, is unchecked, would allow the user to know the order of record sequencing when paging up or paging down through their Contact records. By default, the user must remember the order that was last established. Checking this option will display the order name after the database name in the GoldMine Status Bar to the lower left on the Main GoldMine dialog form display. By default, the status bar might display the database name only **Demo**, however, if this option were selected, the status bar might display **Demo by Company** or **Demo by Contact**. The user needs to determine whether this information is important enough in their daily usage to be displayed, or whether their memory is satisfactory (my memory is not a satisfactory solution).

☑ **Show contact name on activity tabs**, which, by default, is now checked, whereas, in the past the default state was unchecked. The selection of this option does just as stated. When viewing the History tab, Pending tab, or the Activity List, a column will be displayed showing the associated Contact for that activity. This is almost necessary if your organization is using the Additional Contacts on the Contact record (not advised) to display with whom the activity is associated.

Some of these afore mentioned checkbox settings, if changed from the default settings, might appear in the [GoldMine] section of the UserID.ini, although not necessarily in the order displayed, as shown here:

```
ROTitle=1
RoDatesFormat=0
DarkBkGnd=1
RONumsAlignRight=1
ROShowSortBy=1
ShowContactOnActivityTabs=1
ROSetSel=1
LargeFont=1
```

Note

__ZIP Code Validation__ options set here also affect the secondary contact record functionality as well as the primary contact record.

Note

I use the terminology of zip code table as if it were a table, in and of itself, when in fact, the zip codes for validation are stored in the __Lookup__ table.

The next frame that I examine is the **ZIP/Postal Code Validation** frame. The first user option in this frame is one of a three radio button selection. The three function as a radio button group option, only one of the three may be selected at any given point in time. Let's examine them now.

○ **No Validation** no longer changes the Contact record tabbing order. Should the user select this option, no zip code validation will take place on entering a new Zip/Postal Code, or editing an existing Zip/Postal Code. Additionally, the user will be able to enter any zip code for any city or state whether it is correct or not. No validation will occur against the zip code table to assure that the zip code is correct for the city and state that has been entered. In my opinion this option is not the recommended option.

○ **Default to primary city** is a bit misleading as no zip code can, within GoldMine, be designated as the primary zip code for a given area. In point of fact, if the user selects this option, then GoldMine will default to the first city that it finds for the given zip code if multiple suburbs are available for the zip code.

◉ **Show window of cities**, is the default selection. Should the user desire to leave this as set (my recommendation) should there be more than one city or suburb for a given zip code, GoldMine would not select the first match from the zip code table for the user. Instead, GoldMine will present the user with a listing of all possible choices from which the user must select the proper city, state combination for the specific Contact record. The user may select an entry from the window by clicking on the item, and then by depressing the **Enter** key, or they may choose to simply double-click the desired entry. Either selection method is recognized by GoldMine.

Lastly, in this frame, is a checkbox option to ☐ **Show 9 digits in lookup**. As you may or may not know, each field in GoldMine has an associated lookup list. The zip code field is no different in this respect. The lookup list itself, however, is presented differently than all of the other lookup lists. The zip code lookup list displays the **ZIP**, the **City**, and the **State** in the lookup listing. GoldMine allows you to add 5 or 9 digit zip codes. The lookup list only displays the first 5 digits of a zip code by default. If your organization embraces the usage of 9 digit zip codes, then your users would be advised to check this box as, when selected, the lookup window will display the full 10 character zip code. i.e. **01420-4142** If not, then you may have multiple suburbs with the same five digit zip code in the listing window, and the user will have no idea as to which may be the correct zip code for the given suburb.

With that, I conclude my discussion of the ZIP Code Validation frame, however, I would like to show how these settings may appear in the UserID.ini under the [GoldMine] section. These are the settings that relate to this grouping:

```
ZipValid=2
Show9DigitZip=1
```

Note

*This particular entry is useful when the user displays multiple contact windows at the same time using the **Window** | **New Contact Window** option from the GoldMine menu.*

Our next, and final frame under the Record tab Options settings is the C**ontact Window Title**, and is a simple radio button selection for which item the user would prefer to display in the Contact record window title bar. Would the user prefer to see the ◉ **Contact: name** or the ○ **Company: name**. The default is to display the contact name in the Contact record title bar (windowed mode)/tab (tabbed mode). Should the user choose to have the company name displayed instead, then in the UserID.ini under the [GoldMine] section you would expect to see:

```
[GoldMine]
ROTitle=2
```

Calendar

Continuing on, we can now explore the user options for the **Calendar** display and functionality which is under the **Calendar** tab. The dialog description is:

"This folder allows you to set your Calendar's display, the scan interval to add/remove updated activities, and which activities are to be automatically Rolled-over."

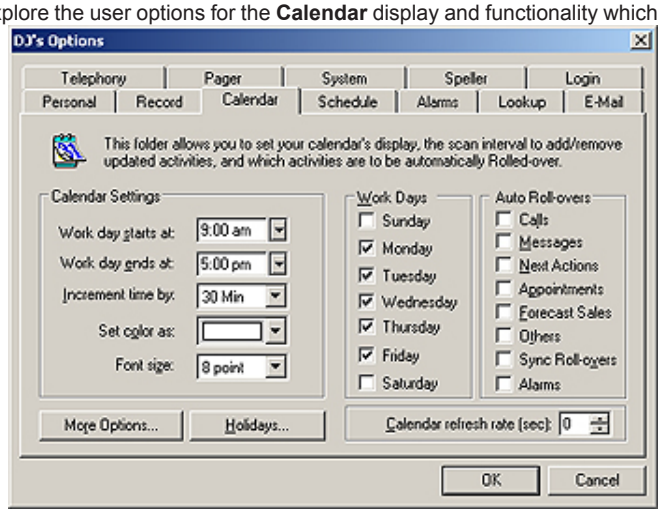


Figure 3-7

Again, I will discuss one frame at a time. The first frame to be discussed is the **Calendar Settings** frame. In this frame, refer here to Figure 3-7, are various display attributes. The first three are separate attributes for one display setting. As simply put as possible, the first and second attribute define the period for having the calendar appear in the color chosen under the fourth attribute. All other times will be displayed as a variant of the selected color. This allows for the visual separation of the work day versus the non-work day on the users graphical Day calendar. The third attribute defines the granularity of the time display on that graphical Day calendar.

The first attribute to set is the **Work day starts at:** time, the time at which the user begins their normal business workday, and the beginning of the color change on the graphical Day calendar. While the second attribute is the **Work day ends at:** time, the time at which the user normally ends their business workday, and the time that the color on the graphical calendar changes back to the designated off work hours color. The next option is to set the calendar display increments using the **Increment time by:** option.

There are various granularities that the graphical calendar may be displayed in:

```
05 Min
10 Min
15 Min
20 Min
30 Min
60 Min
```

Next, the user must select the color, from the drop down color list of 10 colors, that they wish to represent on their workday time frame on the graphical calendar. This is done in the Set color as: attribute setting.

The next display attribute determines the Font size: that is to be used when displaying text on the users graphical calendar. The user has but two selections, 8 point or 10 point. Though I make no recommendation, it has been my experience that most users leave the default setting of 8 point for this attribute.

These five attributes could be represented in the UserID.ini in the following section:

```
[CalObj]
DayBegin=09:00
DayEnd=17:00
TimeIncrement=15
SolidColor=65535
FontSize=8
```

Note

*Times in the **[CalObj]** section of the UserID.ini are based on a twenty four hour clock, or what is commonly referred to as military time.*

Referring to Figure 3-7 again, you see that there are no more attributes to be set in this frame, however, there are a couple of buttons that remain to be addressed. The first is **More Options...** and the second button is **Holidays...**. I mention both of these buttons together as clicking either of them will take you to the same dialog form, albeit to a different tab on that dialog form. Let's begin by addressing the **Holidays...** button first.

Clicking on the **Holidays...** button will bring up the dialog form shown below in Figure 3-8.

Clicking on the **New** button, in the **Holiday Categories** frame, will result in the dialog shown in Figure 3-9. The user may also employ the **Import/Export** button in this frame to go from/to an iCal-

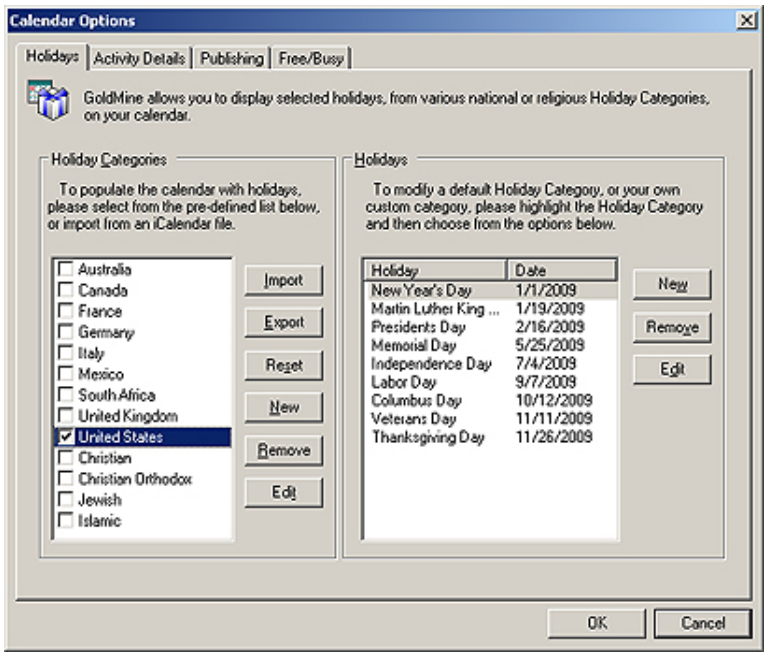


Figure 3-8

endar (*.ics) file. Creating a new holiday category is as simple as typing a name for the category, and then selecting the **OK** button.

Figure 3-9

Once the category has been added, the user may want to add holidays to this category or to any other selected category. This may be accomplished by clicking on the **New** button under the **Holidays** frame, to the right, which will produce the dialog shown in Figure 3-10. I will enter **Personal** into this dialog to create a category for, you guessed it, Personal holidays.

Note

*Only users possessing **Master Rights** will be able to manipulate the **Holiday Categories** or the **Holidays**. All other users will only be allowed to select from the predefined lists.*

Once a category is added to the list, it immediately becomes the selected category for which one may now add holidays. Let's add a holiday to the category Personal by clicking on the **New** button under the **Holidays** frame. Notice that the information in Figure 3-10 has already been added. This holiday is called Patriot's Day, so I have entered that into the Holiday: field. This holiday Repeats every year, and, for this exercise, I have left the setting at **Every 1 year(s)**. It only occurs on one day so I have left the **Duration** at its default setting of **# Days: 1**. This holiday always occurs in the month of April, so I have entered that into the ◉ **On** field along with placing the **19th** in the accompanying field. Please notice that there are two frames here, **By Specific Date**, and **By Day of the Week**. Only one of these frames is available at any given time, and which one is controlled by the selection of the radio button in that frame. I accept this configuration by clicking on the **OK** button.

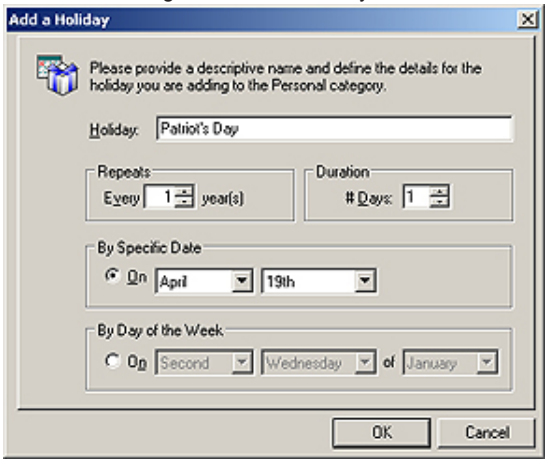


Figure 3-10

If a holiday were two days long, then I simply change the **Duration # Days** to **2**, Figure 3-11. Notice that I used the second frame **By Day of the Week** to establish the first day of this two day, for us, holiday.

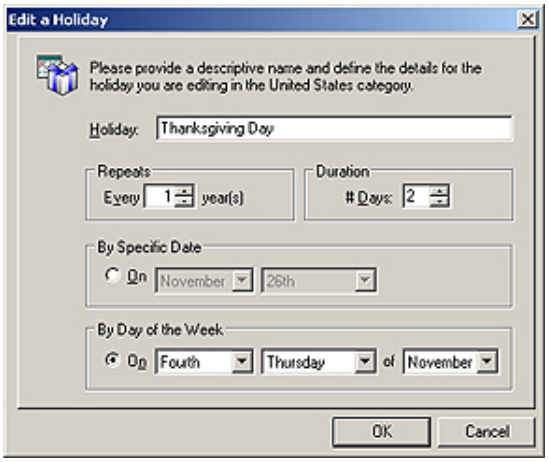


Figure 3-11

So where is all of this holiday information stored? That is the big question. The categories and their contents, as designed by a user possessing Master Rights, are stored as records in the Cal table, having a Cal.RecType of H. The category name, itself, is stored in the field Cal.Ref, while the holidays that are contained within the category, are maintained in the Cal.Notes memo field. This table, and others, are discussed in detail later in this book, in the chapter titled The Tables. Whereas, the holidays that the user, themselves, select are referenced in the UserID.ini in the following section and statement:

[CalObj]
Holidays=8,201

The numbers after the equal sign represent the Cal.UserID number associated with the categories selected by the user. GoldMine uses this indexed field to quickly find the holiday categories selected by the user, and to then load them onto their graphical calendar.

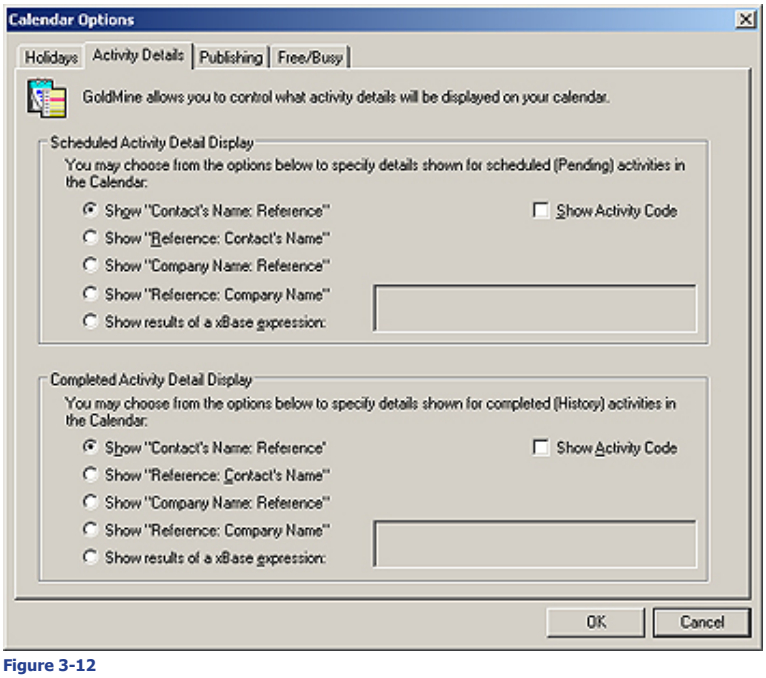


Figure 3-12

The final button that I must discuss from the **Calendar Settings** frame, Fig-

Note

As of this writing, I have not been able to figure out a way to automatically set Monday holidays except one year at a time. i.e. In Massachusetts, Patriot's Day is the 19th of April, but it is celebrated on the Monday preceding the 19th or the 19th if that falls on a Monday.

Note

*The numbers after the equal sign, represent the numbers in the **Cal.UserID** field. For instance **Holidays=8,201** would have the values of **008** and **201** stored in the **Cal.UserID** field of separate records. Old timers will notice that user defined holidays have a new designator. What used to be 011, is now designated 201. Refer to the chapter **The Tables** for more information.*

ure 3-7, is the **More Options...** button. Clicking on said button will produce the dialog form shown in Figure 3-12 as shown on the previous page. One could also have simply clicked upon the **Activity Details** tab as previously shown in Figure 3-8 to arrive at the same location. You are presented with two frames that you may configure from this dialog form, the **Scheduled Activity Detailed Display**, and the **Completed Activity Detail Display**. The former is for designing the display information on the graphical calendar while an activity is Pending, as the latter is for designing the displaying of information on the graphical calendar once an activity has been placed in History. By default, the contact name and the subject of the activity are shown for the Scheduled Activity Detail Display as well as the Completed Activity Detail Display, when they are displayed on the calendar. These text items will appear on the graphical calendar just after the icon which represents the activity that was chosen.

As we have seen in the past in this book, and as we will see again later in these chapters, the radio button selection is a grouping of three buttons. One may accept the default ◉ **Show "Contact's Name: Reference"** or one may select the reverse presentation of that as in ○ **Show "Reference: Contact's Name"**. As I mentioned earlier, these refer to the contact name associated with the activity, and the subject of the activity that has been scheduled. New to GoldMine Premium was the ability to ○ **Show "Company Name: Reference"**, and ○ **Show "Reference: Company Name"**. You may have noticed that there are no hot links for these two newly added radio options. Alternatively, one may choose to be creative, and design your own display, through the use of an xBase expression, by selecting the radio button to ○ **Show results of a xBase expression:**.

Tip

Should one choose to create their own expression for the displaying of calendar information, one is reminded that there is limited viewing space on the calendar, and that there is always the potential of having more than one activity occurring in the same time frame. Don't be overly verbose.

Should the user select to build their own expression, for display on the graphical calendar, they have a wide selection of fields, and characters from which to choose. Let me give you an example of an expression:

```
trim(Contact1->Contact)+[  ] +chr(127)+[ ]+trim(Contact1->Phone1)+[ :o)]
```

...would produce this result in the graphical calendar:

Figure 3-13

I am sure that your users will be more creative. The example demonstrates the use of functions, fields, and text for the desired display results. You may use any valid xBase function as defined in Appendix A of this book. The first thought of most users is that they could use this option to display other information on their graphical calendar. I would like to express an alternative view. This option could also be used to remove the clutter of information from the graphical calendar. This is just another way of looking at the expression option, yet one that I would not want your user to overlook.

Note

*The user determines which activities, Scheduled (Cal table) and Completed (ContHist table), display on their graphical calendar by right-clicking on the **Day** calendar in the timed area, and selecting **Activities...** from the local menu.*

*From the resulting dialog form, **Select Activities to View**, the user checks those activity types that they wish to have displayed, while unchecking those that they do not want displayed on their graphical calendar. My users will uncheck Messages as these do little more than clutter the graphical calendar unnecessarily.*

On the Activity Details tab, Figure 3-12, you also have a simple checkbox option which would allow the user to ☐ **Show Activity Code**. This option displays the activity code should you use Activity Codes (something that I always recommend), from the **Code:** field of the scheduled activity, between the activity icon and any text that is being displayed. Figure 3-13 shows the display when this option has been selected by the user (**[TST]**). Please note that the Activity Code appears after the icon for the activity, but before anything that the user has indicated that they would like to have displayed.

Note

This is one of those areas that the GoldMine Administrator may want to present a corporate image, and to achieve this, the GoldMine Administrator may select to provide a user override as discussed later in this chapter.

At this point I should discuss the **Completed Activity Detail Display** frame, shown in Figure 3-12, and discuss its options. As it is a duplicate of the **Scheduled Activity Detail Display** tab, I do not feel that I need to waste the extra trees that would be required to re-discuss the material. I would like to mention, regardless of what display options the user selects under the Completed Activity Detail Display frame, the activity will be displayed on the graphical calendar with a line through the activity as well as being displayed with a grey background. Additionally, for the Completed Activity Detail Display to be displayed at all in the graphical calendar, the user would have to set options through the calendar itself as to which activities, scheduled and completed, they wish to have displayed (see sidebar Note). This section only lets the user define how an activity, scheduled or completed, is to be displayed, and not which of the activities should be displayed on the graphical calendar.

Both of these settings could be presented in the UserID.ini:

```
[CalObj]
CalShowActvCode=1
CalExpr=trim(Contact1->Contact)+[  ] +chr(127)+[ ]+trim(Contact1->Phone1)+[ :o)]
HistExpr=0
HistShowActvCode=0
```

I will mention here that a **1** in the **CalShowActvCode** means that the **Activity Code** will be displayed when viewing pending activities while the **0** in the **HistShowActvCode** statement means that the **Activity Code** will not be displayed for historical activities. The **CalExpr** and the **HistExpr** state-

ments work slightly different. I had created an expression for our calendar example, therefore, that is included in the **CalExpr** statement. If I had accepted the default radio selection of ◉ **Show "Company Name: Reference"** then this statement would be similar to the **HistExpr** statement. On the other hand, if I had chosen the ○ **Show "Reference: Company Name"** radio button, then the statement would have appeared as **CalExpr = 3** instead. It could get confusing as you can see.

In past versions of GoldMine, this would conclude our discussion in this area, however, one will notice that there are two additional tabs as shown in Figure 3-12. Though these are not necessarily accessed from any buttons on the **Calendar** tab under a user options, they are here and available for discussion. Additionally, any changes made to either section will update the UserID.ini, therefore, I have selected to discuss them here.

Note

When you downloaded this book, a zip file of the web display pages was included in that download.

*You should unzip these pages and put them on your website. I have placed them under **http://www.DJ-Hunt.com/html/DWDSite/iCal** on my site, and, as you will see in my discussion, I will publish to the calendars folder under the **iCal** folder via the **File Transfer Protocol**.*

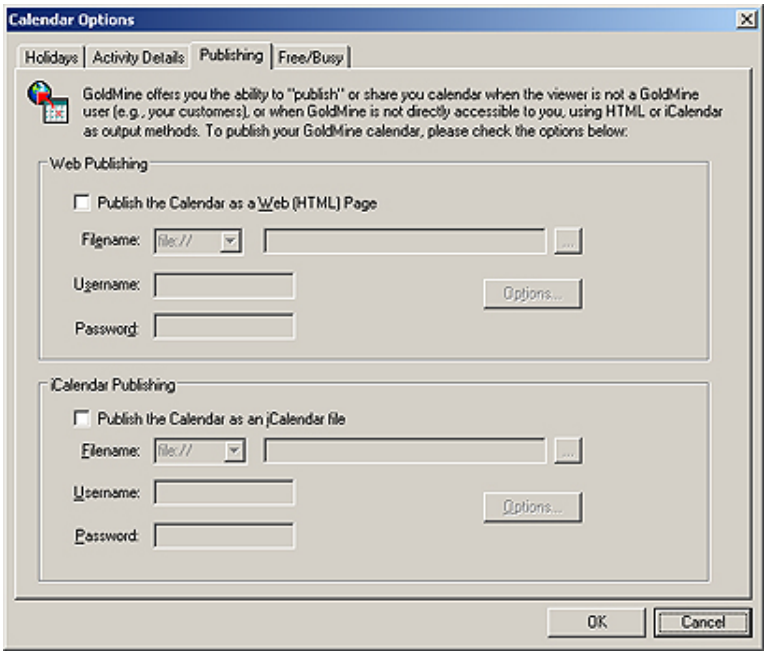


Figure 3-14

The first of these that I will discuss is the **Publishing** tab which I personally use to publish our calendars to a web location. From an earlier version of the GoldMine Help files: *"GoldMine offers you the ability to "publish" or share your calendar when the viewer is not a GoldMine user (e.g., your customers), or when GoldMine is not directly accessible to you, using HTML or iCalendar as output methods."* I have chosen to use the **iCalendar Publishing** frame for this discussion. I have supplied you a zipped download with iCalendar web pages for you to use to display your published iCalendar if you so choose. This is the very same parser that I am currently using on my website. In fact, everything in this section is from my real use of the GoldMine iCal publishing capabilities. I have gotten many requests from GoldMine users asking me how I utilize this very feature. I would add that the steps and the dialogs are identical for **Web Publishing** as they are for **iCalendar Publishing**, and that the only difference is in the published results. **Web Publishing** produces an HTML output calendar, whereas, **iCalendar Publishing** results in an ICS output calendar. As I have stated, my organization has chosen the latter, and it is that which I will now describe.

As you may have noticed in Figure 3-14, you must select the option to ☐ **Publish the Calendar as an iCalendar file**. This enables that frame for further input. In the 1st of the **Filename:** fields, I will choose **ftp://** from the drop list which contains **file://**, **ftp://**, or **http://**, and as my site requires the File Transfer Protocol, I would choose the **ftp://** option. In the 2nd of the **Filename:** fields, I have entered the path, and name on our website to which I want to publish our calendars file, **DJ-Hunt.biz/iCal/Calendars/DJ Hunt Eastern.ics**.

In the **Username:** field I have entered my ftp:// login name, **DJHunt**, as I have entered my password for the ftp:// login into the **Password:** field, ****** (You didn't really think that I would give that out now did you?). I then click on the **Options...** button which brings up the dialog form displayed in Figure 3-15 on the next page. These options are iCalendar filtering conditions. The first tab, **Users**, lets one select the users or user groups for which one desires to publish a calendar. By default only the user for whom the options are being set is selected, however, one may choose any number of users or user groups. Double-clicking on a name or user group will remove it from the list, and place it in the opposing list.

Clicking on the **Activities** tab allows one to select those activities from the **Cal** table that they wish to have published. This filter is slightly different for the HTML versus the ICS publishing format. As

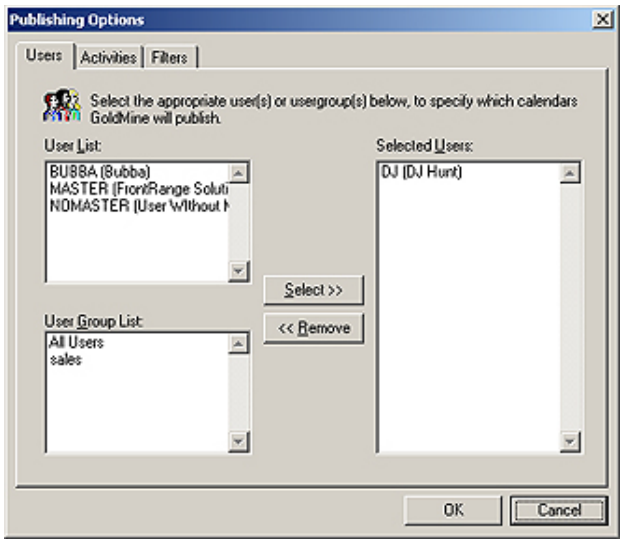


Figure 3-15

you can see in Figure 3-16, there are 5 activities that may be published for ICS. For HTML publishing (not shown) there are 9 calendar activities that one may publish, and 8 historical activities that you may publish as well. The HTML publishing is more akin to the GoldMine graphical calendar than is the ICS publication. I present this to you as it may be a factor in your decision to use HTML over ics publishing. Everything that can be displayed on your graphical calendar can be published to your HTML calendar. As you can see in Figure 3-16, I have only chosen to publish Appointments, Calls, Next Actions and Other actions. I have done so because we never utilize Events by mandate.

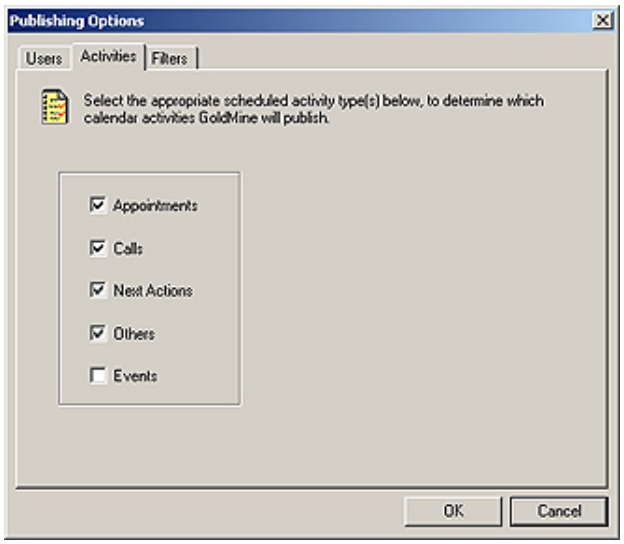


Figure 3-16

All of the afore mentioned options are filters of sorts, however, there is also a **Filters** tab, as shown in Figure 3-17 on the next page, and it is on this tab where you may set to publish a specific date range, or publish the ☐ **Activity Code**, or to publish the ☐ **Reference contains**, or to ☐ **Publish only linked calendar data**. You may choose all, or none, which ever is your preference. As you can see from Figure 3-17, I have chosen to publish within a certain date range, and only those activities on my calendar that are linked to a contact record will be published.

When finished, you simple click on the **OK** button, and then again on the next **OK** button to write the information back to the UserID.ini.

The following information is written to the section shown in the DJ.ini for the options that I have selected:

```
[CalObj]

PublishHTML=0
PublishHTMLPath=
PublishHTMLUsersList=
PublishHTMActvTypes=00000000000000000000000000
Publish2HTMFilterByDate=
PublishHTMFilterByLink=
Publish2HTMStartDate=
Publish2HTMEndDate=
PublishHTMLUser=
PublishHTMLPwd=

PublishICal=1
PublishICalPath=ftp://dj-hunt.biz/ical/calendars/dj hunt booktest.ics
PublishICalUser=djhunt
PublishICalPwd=9EB2C3A13DB38D83B94787AD9EB05759A7D9D5D79D9287AD
PublishICalUsersList=DJ;
PublishICalActvTypes=11100001000000000000000000000
Publish2ICSFilterByDate=30647
Publish2ICSStartDate=20090220
Publish2ICSEndDate=20100220
PublishICSFilterByLink=1
```

We can move on now to the **Free/Busy** tab as shown in Figure 3-18. In this case, *"GoldMine offers you the ability to "publish" your Calendar's Free/Busy time when the viewer/scheduler is not a GoldMine user (e.g. they are an Outlook user), or when GoldMine is not directly accessible to you."*

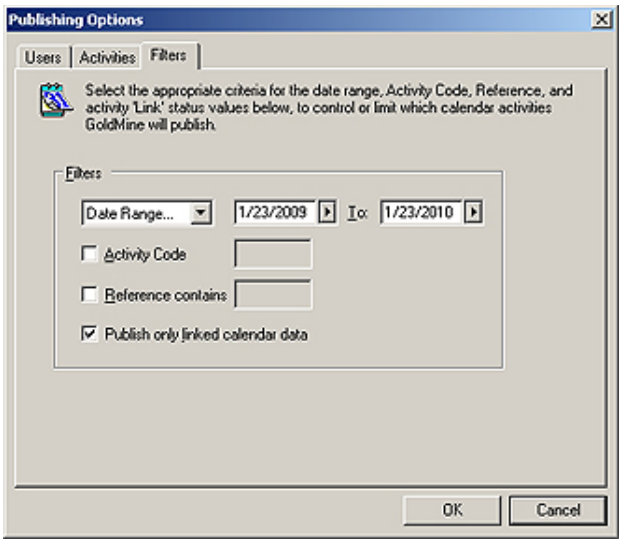


Figure 3-17

Interesting! Basically, this is no different than the Publishing which I just discussed with you. It is an **iCal** type publishing process, as was my previously discussed Calendar Publishing, that could be retrieved into Outlook or any similar iCal compliant application. The Free/Busy tab contains every option under this one dialog form. There is not a separate dialog form, for instance, for Filtering. Everything is inclusive on this one tab.

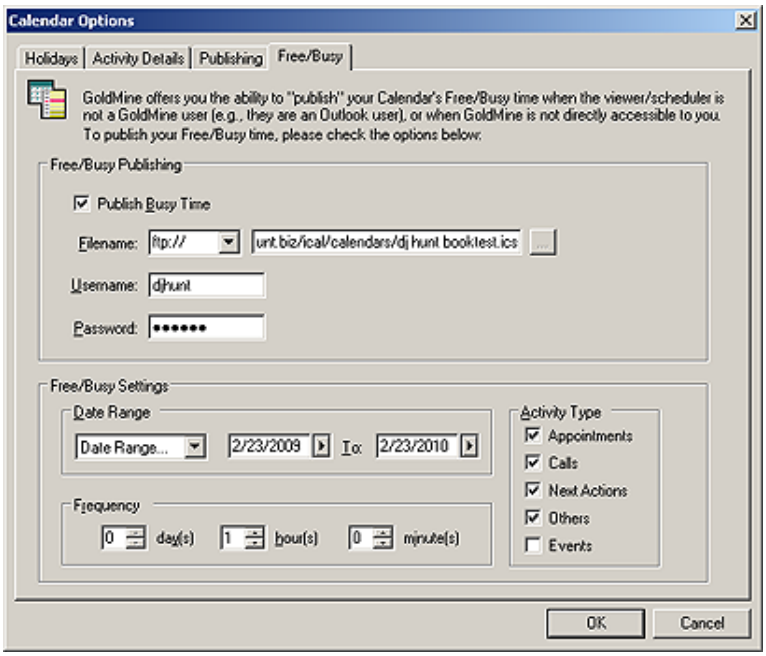


Figure 3-18

In order to enable the fields for data input, one must first select to ☐ **Publish Busy Time**. Once that option is selected, the remainder of the fields on this tab will be enabled for data input. There is very little that is different on this dialog form than was on our previous multi-tab dialog form. The **Filename:** field is first, and it too is a drop list containing your choices of transport for the published material **file://**, **ftp://**, or **http://**. Then there is a following field for the path, and file name, to which you want the published material to be sent. For this exercise I have chosen to include the same information as I previously utilized.

The **Username:** and **Password:** fields will be available if you are publishing to an **ftp://** site, and no further explanation should be necessary for either of these fields, as their labels say it all.

The filter shows up in the **Free/Busy Settings** frame of this dialog form. As before, one may pick a specific period under the Date Range frame, or you may supply a **Date Range...** by picking the start and the **To:** dates from a drop list.

Additionally, as before, one may select the **Activity Types** to be published. From here, we see something that we had not previously seen, **Frequency**. Whereas, pushing **Web Publishing** and **iCalendar Publishing** were on demand, **Free/Busy Publishing** can be somewhat automated. In

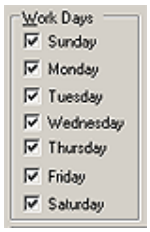
this frame one would set the frequency in **day(s)**, **hour(s)** and/or **minute(s)** that they would like to have GoldMine automatically publish their Free/Busy calendar. This really should be a corporate decision, however, in lieu of that, the user may decide that publishing once a day is sufficient. Possibly, once every 4 hours would be better. I make no recommendations in this instance, as it is truly dependant upon corporate standard operating procedures.

For this exercise the resulting UserID.ini settings might be as shown here:

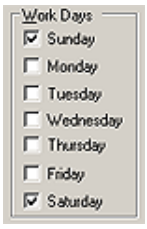
```
[CalObj]
PublishFBPath=ftp://dj-hunt.biz/ical/calendars/dj hunt booktest.ics
PublishFBUser=djhunt
PublishFBPwd=92A8C7E541B79187BD4BA89B92A4EBDDD9DBAB9E9184A89B
PublishFBFilterByDate=30647
PublishFBStartDate=20090223
PublishFBEndDate=20100223
PublishFBFreq=60
PublishFBActvTypes=11100001000000000000000000000
```

This would conclude our examination of the **Calendar Settings** frame, and allows us to proceed to the **Work Days** frame as shown back in Figure 3-7. Simple put, these are checkbox options that work similar to the time settings discussed in a previous section. One checks the days that are considered to be work days, and GoldMine displays the work days, work hours in the color selected in the previous grouping. All of the non work days, and non work hours are displayed in a darker hue of the color selected. By default, the normal work days of Monday, Tuesday, Wednesday, Thursday and Friday are checked. If your user works on days other than these days, they would check and uncheck the options as is appropriate for their need. The results of the selections in this grouping are derived and displayed, in the UserID.ini as shown here:

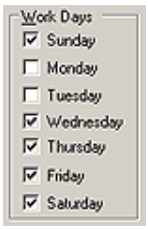
```
[CalObj]
Weekends=65
```



Weekends=0
Figure 3-19a



Weekends=62
Figure 3-19b



Weekends=6
Figure 3-19c

See the sidebar for an explanation as to the derivation of these numbers. Figures 3-19a, 3-19b, and 3-19c show a few more samples of various settings that could have been derived for this section.

We can now delve into the **Auto Roll-over** frame of Figure 3-7. This is a most interesting frame, and sometimes causes consternation in an office. By selecting an activity for auto roll-over, one is stating that should the user not complete an activity on the assigned day, the next time the user logs into GoldMine, said activity will be forwarded to the logged in date. Technically, GoldMine is expecting each activity that is scheduled will also, at some point, be completed creating a history for said activity. I have found, however, users are not as attuned to following procedures as we might want them to be, hence, the need for the corporate establishment of an **Auto Roll-over** paradigm.

Should a user forget to complete an activity, or outright just not complete the activity, then the auto roll-over feature pushes the activity in their face. The users calendar will soon get cluttered on the current date with uncompleted activities and, most likely, the users will complain to you that their calendar is so cluttered. Another complaint that I have seen is: “How come there is all this activity when I first log into GoldMine? It takes forever, to start.”. This could also be a result of the Auto Roll-over feature. As one logs into GoldMine, any activity type that is marked for roll-over will be rolled over at the time of the login. Now, when that user checks their calendar, all of the uncompleted activities from prior days will show up on todays calendar.

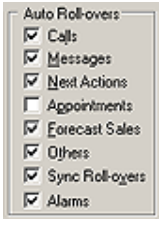


Figure 3-20

Here in Figure 3-20, I am just looking at this one frame so that you won’t have to flip back too many pages. Notice the checkbox, ☐ **Sync Roll-over**. If the user, or if you should select for the user to have any activities rolled over, then it would be wise to check this option. By default, as GoldMine is rolling over an activity, it does not update the sync logs with the new date, hence, anyone, out in the field that is synchronizing with the corporate office, will be unaware of any of these scheduled changes. However, let me make a point. Your Remote users should have this option checked for their UserID on their side only, and not for their in house Options. The Remote user should also be encouraged to Schedule and Complete their

Note

Web Publishing *and* ***iCalendar Publishing*** *may be automated as well, however, this must be accomplished via the* ***Server Agents****. One must remember to* ***Start Server Agents****. This may be done via the menu, by hand, or via a keyboard macro when GoldMine is started.*

G:\GoldMine\GMW.exe /u:UserID /p:Password /m:MacroNumber

This is the method that we prefer, however, at least in build 70606 of GoldMine Premium, the keyboard macros are still not functioning under a Vista environment.

Note

The ***Weekends*** *variable setting is based upon the sum of the corresponding values of the* ***unselected*** *work days:*

Sunday	=	***1***
Monday	=	***2***
Tuesday	=	***4***
Wednesday	=	***8***
Thursday	=	***16***
Friday	=	***32***
Saturday	=	***64***

In our case, Figure 3-7, Sunday and Saturday were not selected (default state) as work days, and the resulting statement was:

Weekends = 65

Tip

GoldMine was designed around the paradigm that a person that can schedule their day will be more productive than one that does not. Along with the scheduling of activities, and even if you don’t schedule activities, the completion of those activities, and even unscheduled activities, is what creates the history with your customers.

It is important that you get your users in the habit of scheduling everything which they can, and completing everything, scheduled or not.

activities only from the location from which Sync Roll-over has been selected. It is possible that the Remote user could schedule something for this user in a used time slot thinking, and rightly so, that the time was available. If your users activities are being rolled over, then you should consider checking this option as well. It should almost be a **S**tandard **O**perating **P**rocedure within your organization. I have found that most users wish to have everything, except for uncompleted appointments, rolled over. I have seen, in cases where activities have not been rolled over, that the user also tends not to complete activities, and the calendar table becomes bloated. Remember that the intended use of the calendar is to schedule as well as to complete activities creating historical archives of information concerning any given customer on their record. To not follow this paradigm would lessen the effectiveness of GoldMine within your organization.

This grouping has its own section in the UserID.ini, and depending on the settings that section might look like this:

```
[ActvObj]
AutoForward=1110112
AFStampSync=1
```

In the AutoForward statement, you will notice that there is a single 0. This represents the standard setting of everything checked except Appointments, as I have in my GoldMine Options, and as shown in Figure 3-20. I am perplexed as to why FrontRange would use a **2** for a flag on this option as opposed to the standard **0**/**1** (Off/On) bit switch.

I wonder if any of my previous readers noticed that there is a new Auto Roll-over item in GoldMine Premium 8.5x? That's right, it was the addition of the ☐ **Alarms** (no hot key) option item. Whereas, in the past, Alarms would be automatically rolled over with the activity, one now has the option to determine if, in fact, they wish the Alarms to be rolled over independent of its activity.

Figure 3-21

Again, I have taken the next frame from Figure 3-7, untitled, and I am showing it here in Figure 3-21. This frame has a single item included within it. The **Calendar refresh rate (sec):** doesn't affect the user as much as this setting will impact the network traffic. The default setting for this item is 0. This setting instructs GoldMine to disable the refreshing of the calendar. This means that GoldMine will only poll the CAL table for items on this calendar when the calendar is first opened. In order for the user to see any new items that were added while the calendar was opened, the user choosing this setting, must close the calendar, and then reopen the calendar again.

A user could up this setting to 10 seconds which is the minimum setting other than 0 that GoldMine will permit. Doing this would cause GoldMine to poll the CAL table for changes that affect this calendar, every 10 seconds, and would refresh the calendar accordingly. This may be nice for the user, but could play havoc with network traffic, if this were an office with a large number of users all having similar settings. Most offices will set the standard for this setting, and I have found that most offices do not touch this setting once set. However, should your users wish to adjust this setting, they may do so in one second increments. Setting any number, 1 thru 9, will cause GoldMine to notify you, and set the minimum value of 10 seconds. Whenever anyone is thinking of adjusting this setting, they should make the decision in conjunction with their network administrator. I strongly recommend a User Override for this option.

The default setting is stored in the UserID.ini as:

```
[CalObj]
RefreshRate=0
```

That concludes my discussion of this, the **Calendar** tab, and brings us right into the **Schedule** tab as shown here in Figure 3-22.

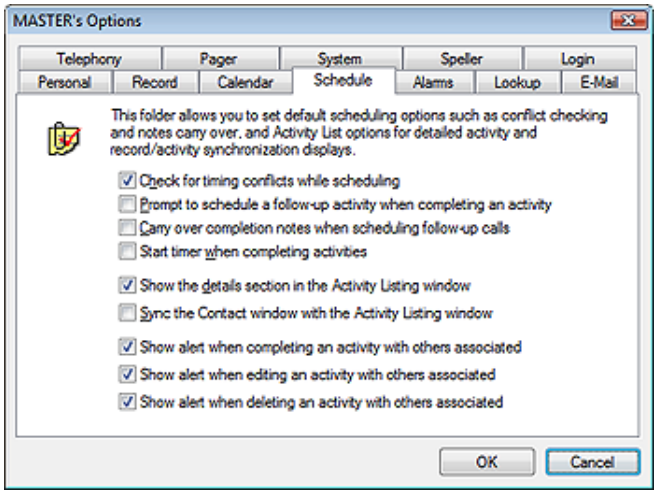


Figure 3-22

According to the dialog form, *"This folder allows you to set default scheduling options such as conflict checking and notes carry over, and Activity List options for detailed activity and record/activity synchronization displays."* This tab lets the user select/deselect 9 options now. Let's examine these nine options in a bit more detail.

Schedule

Note

I want to apologize for the graphics change here as we have now taken GoldMine Premium 8.5.1.10 live which places it on Workstations using the Vista operating systems.

The grey backgrounds should now disappear from all of the graphics.

WARNING

*When completing an activity in GoldMine with a duration of 00:00:00, and with any value, active or not, in the Status Bar Timer, the activity **will** have the duration field populated with that timer value. In GoldMine Premium, it is important to remember to **Reset Timer** after each use.*

☑ **Check for timing conflicts while scheduling** causes GoldMine to check to see if anything is already scheduled for said user/resource, as the user is trying to schedule a new activity/resource. Actually conflict checking occurs as the user leaves the **Time:** field. If there is a conflict in timing, said user will be notified immediately via a popup dialog form, and will be asked to **Ignore Conflict** or to **Re-schedule** the conflicting activity. Without this option checked, the user will be allowed to schedule multiple activities on the same date during the same time interval. By default, GoldMine has this option selected.

☐ **Prompt to schedule a follow-up activity when completing an activity** is the new GUI option for this version & build of GoldMine Premium, although I have discussed this in the GUIless section of previous editions of this book. Here is the section from my last book:

■ **Scheduled Activities - Automatically default to ☑ Schedule a Follow-up**

When completing an activity, this option is not selected in the default GoldMine configuration. If, on the majority of activities, the user should be scheduling other activities as a follow-up to the current activity, then you may want to have this option selected as a default condition for your users. To have the ☑ **Schedule a Follow-up:** checked by default, this would be the setting in the UserID.ini:

```
[GoldMine]
Followup=1
```

Naturally, with this option now within the GUI, I will no longer discuss this in the GUIless section of this chapter, however, it is important that you realize the functionality of said switch.

☐ **Carry over completion notes when scheduling follow-up calls**, and I want to bring your attention to the fact that GoldMine has stated **follow-up calls**. This option actually pertains to all scheduled activities, and not just to calls. The user must actually follow certain guidelines to have this option function properly for them. If the user checks this option, then as this user is completing a scheduled activity, if the user has notes in that activity, and if the user schedules another activity from this dialog form, then those notes will be brought forward to the new activity dialog form. At this point the user would just need to fill in the specifics of the activity, as all of the notes from the previously completed activity will be there, and will not require retyping. I am not sure why GoldMine has not checked this by default, but I feel that this is an extremely useful functionality to have in GoldMine. Personally, I always have this option selected for myself.

WARNING

*When completing an activity in GoldMine with a duration of 00:00:00, and with any value, active or not, in the Status Bar Timer, the activity **will** have the duration field populated with that timer value. In GoldMine Premium, it is important to remember to **Reset Timer** after each use.*

☐ **Start timer when completing activities** is an option that was placed here for the telemarketing powerhouse organizations. This option is one that probably should pertain to just calls, however, its selection affects all activities. Since its original intent was for the powerhouse telemarketers, lets look at that first. As a telemarketer, the more calls that you can place, the better off your position. One must make x number of calls per hour. The telemarketer prepares to complete the call, hence GoldMine automatically starts the timer. Now the telemarketer finishes the call, and, in turn, finishes completing the activity. GoldMine will enter the time, from the timer, into the **Duration:** field for the user. The key steps to remember, regardless of the activity type, is that the user must begin the process of completing the activity to start the timer, and when the activity is actually completed by the users clicking upon the **OK** button, then, and only then, will the timer be stopped. In the past this only applied to GoldMine completed calls. As of GoldMine 7.00.51018 this feature is applied to all activities that are being completed with a duration of 00:00:00, and where there is a value in the timer field. Immediately upon clicking the **OK** button, the timer would stop, and would not start new until they display the **Complete a Call** dialog form for the next call that they are in the process of making. Pow, Pow, Pow the telemarketer concentrates on the call, and powers right through their call listing for that day.

Recommendation

As you may have realized from my statements, in my opinion there are many disadvantages to using GoldMine Premium in the tabbed dialog form mode. Personally, I have separate dialog forms strategically displayed on my screen. I have the Contact dialog form directly above the E-mail Center splitting the vertical space evenly in half with their horizontal widths only taking up half of the horizontal space. Top to bottom, and taking up the remaining horizontal half of the screen, is my Calendar. I have found, over the years, that this layout works best for my usage of GoldMine Premium as opposed to the default tabbed configuration.

Well, if this option is activated, it affects all activities in GoldMine Premium. Would the user want the clock started as they are completing a Next Action? Probably not. Would the user want the clock started as they completing a scheduled Appointment, probably not. I guess that is why these are called users **Options**. It is up to the user to determine if selecting this option would be the correct choice in their usage of GoldMine. I have found, however, that very few users select this option.

☑ **Show the details section in the Activity Listing window** is an option that is selected by default, and appears to be a legacy hold over. Beginning with GoldMine Premium 8.5, this option appears to be completely irrelevant as the Activity Listing window now comes empowered with the new **Preview** toolbar.

☐ **Sync the Contact window with the Activity Listing window** is by default not selected. However, if selected, as the user highlights an activity in the Activity Listing window the Contact window will automatically synchronize to the associated company/contact record. This is not a critical feature if using GoldMine Premium in the tab mode, at least not in my opinion. If one has the screen real estate to show multiple windows, then this could be very advantageous, and will provide the user all of the information about the highlighted activity.

You now see another grouping of options with which the older version GoldMine users may not be familiar. GoldMine has no hot keys for these three options. Additionally, I would add that these options are not mentioned in the GoldMine Help files (weren't there in the GoldMine 7 Help files either), therefore one would have to speculate that the option description is self-defining. One could interpret these option statements improperly however. In general terms, these options are referring to Recurring activities that have been scheduled at the same time. These UserID.ini warnings have been in use for some time now, however, GoldMine 7 was the first version to make them accessible via the GUI.

☑ **Show alert when completing an activity with others associated**
☑ **Show alert when editing an activity with others associated**
☑ **Show alert when deleting an activity with others associated**

In my UserID.ini, these options on this dialog form would be represented as:

```
[ActvObj]
ConflictOn=1
ShowDetail=1

[GoldMine]
SyncActvObj=1
FURef=1
CompTimer=1

[Warning]
WarnAboutCompleteMultiLinkActiv=0
WarnAboutDeleteMultiLinkActiv=1
WarnAboutEditMultiLinkActiv=1
```

That concludes my examination of the Schedule tab.

Alarms

Next I will consider the options associated with the **Alarms** tab, Figure 3-23. Even though there is no frame around them, the user must first decide whether they want to have alarms or not, and if so, which type of notification they would like to receive. This option is represented by the three radio button option at the top of the dialog form. The first option, is, of course, to ○ **Disable alarms**, and I have found that a lot of users would like to select this option to avoid the annoying alarms. This does seem to defeat the purpose for having alarms in the first place. The alarms act as a tickler to remind the user that they have a task to accomplish, and it is the proper completion of this task that makes GoldMine the valuable tool that it is. The historical information on a company is valuable information to have when attempting to close a deal. Additionally, the activity may have been scheduled for them by another user, and/or an Automated Process. The user wouldn't necessarily be aware of the activity if it were not alarmed, and the user had not disabled their alarms. I think that the corporate standard should be to not select this option (see sidebar Recommendation).

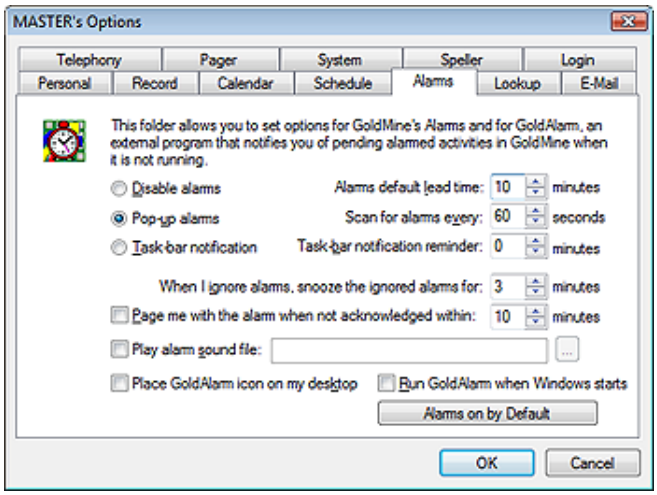


Figure 3-23

Recommendation

*In my opinion, a wise GoldMine Administrator would employ a **User Override** so that their users will have ○ **Disable alarms** disabled at the beginning of that users GoldMine session, at least, in its default state. I will discuss the User Override later in this chapter.*

The next radio button is the default selection for this option and it is to have ◉ **Pop-up alarms**. A pop-up alarm is another in your face dialog form to which the user must react. See Figure 3-24 on the next page for a sample of this type of dialog form. This type of pop-up dialog form is always on top of all windows display on your screen regardless of the applications that you have currently running. If the user were to try switching to another application, Ctrl-Tab, this alarm would still remain as a top level form.

The third selection for this option is to have a ○ **Task-bar notification** which is definitely not as in your face to the user as a pop-up alarm dialog form. This type of alarm can be easily missed by the user, see Figure 3-25 on the next page. The user should receive the default audible beep along with this type of notification (a sound file may be played in place of the default beep, I will discuss this option shortly), however, if the user is working at 1024x768 screen resolution or better, this type of notification could easily be overlooked. For criminy sakes, you can barely notice it here in this book.

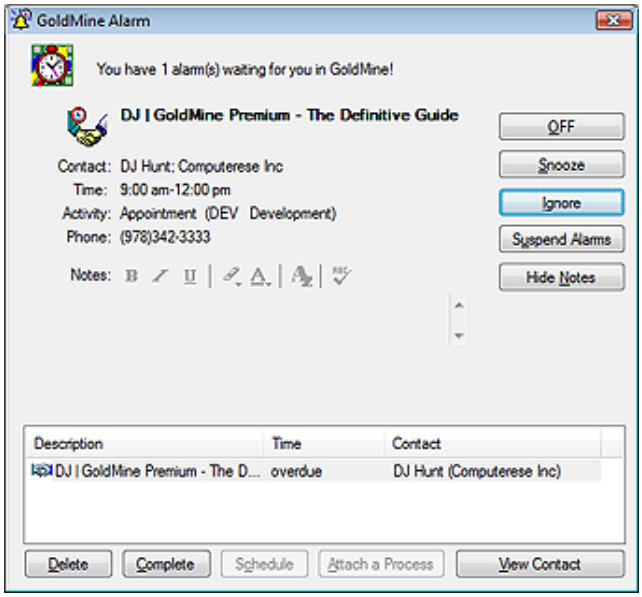


Figure 3-24

How is any user supposed to notice that in their Status Bar while they are multitasking is beyond me. I don't think that is going to happen, and I certainly do not recommend this option choice.

When the user is scheduling an activity, and they check to have an alarm, GoldMine will automatically subtract the lead time specified in the **Alarms default lead time:** box from the **Time:** set when the user is scheduling an activity. The lead time is specified in **minutes**. Later, in the **GUIless INI Statements** section of this chapter, I will discuss how to set up the UserID.ini to have GoldMine automatically check the Alarm option on the scheduling dialog form when the user is scheduling their activities.

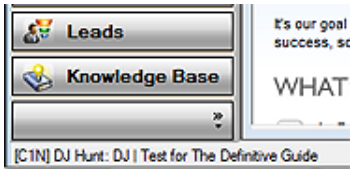


Figure 3-25

The next option that the user must consider is to **Scan for alarms every: xx seconds**, the default being scanning for alarms every **60** seconds. This is probably an optimal setting for this option. Again, you can see that there is the issue of network traffic. Every time GoldMine scans for alarms, GoldMine is creating network traffic. If you have 200 GoldMine network users, this could result in a substantial volume of network traffic. Users should consult with their Network Administrator before changing this setting. Let your Network Administrator determine what the optimal setting is for your corporate network load.

The next setting that the user must consider is the **Task-bar notification reminder: xx minutes**. Should the user select ○ **Task-bar notification**, which I had discussed earlier, there is no user interaction when the alarm is triggered. The notification could be easily overlooked as I had mentioned earlier. To minimize this possibility, GoldMine has given the user this setting to remind him/her, at a self specified interval, in the task-bar (aka **Status Bar**) until such time as the user properly completes this alarmed activity.

The GoldMine Pop-Up alarm does allow for user interaction, as you can see in Figure 3-24 above. One of those interactions is **Ignore** the alarm. Once the user selects to ignore the alarm, GoldMine only wants to allow it to be ignored for a predetermined length of time before it again pops up in the face of the user. The user, of course, determines how long a period of time must pass before the alarm is activated again. **When I ignore alarms, snooze the ignored alarms for: xx minutes**, is the option used to set this interval. The default snooze duration is 3 minutes. The user may opt to increase the amount of snooze time, or decrease the amount of snooze time. In most cases, if the user adjusts this time at all, the user opts to increase the snooze duration.

This next option works in conjunction with another collection of settings, which I have yet to discuss, the Pager settings. I will discuss those settings later in this chapter under the **Pager** tab options. For now, however, the next option under the **Alarms** tab is to ☐ **Page me with the alarm when not acknowledged within: xx minutes**. The default duration for this option is 10 minutes. This is fairly self-explanatory, yet it does instruct GoldMine to page the user if the user has not responded to an alarm within the 10 minute portal, in the default case, after the alarm has been tripped.

GoldMine next permits the user to identify a sound (**.wav**) file to be played in lieu of the default ding.wav that is played by GoldMine as an alarm is tripped. I have seen some users get very inventive with this option. The ☐ **Play alarm sound file:**, when selected, allows the user to browse their environment for a .wav file that they would like to have played as the alarm is triggered.

The UserID.ini settings for the **Alarms** tab as I have discussed to here could be:

```
[GoldMine]
AlarmFreq=60

[ActvObj]
AlarmsOn=1
AlarmsLead=10
```

Note

*Task-bar is actually a misnomer that has been carried through in many versions of GoldMine. This area, in most applications, is normally known as the **Status Bar**.*

Recommendation

*This is yet another good case for a **User Override**. The GoldMine Administrator should do everything in their power to prevent the user from defeating the GoldMine Alarm system. If I had my way these would not even be user options.*

Note

Although GoldMine will allow you to select an mp3 file, apparently GoldMine Premium doesn't know how to actually play David Bowie tunes.

WARNING

User Caveat: *If* ***GoldAlarm*** *is running, and the user starts GoldMine, GoldAlarm will close and the icon will no longer be available in the system tray. This is the expected behavior. However, upon closing their GoldMine session, the user might expect GoldAlarm to re-initiate itself, and it will not. If, after running GoldMine, the user wishes to reactivate GoldAlarm, they must do so by employing the desktop icon, if one was so created, or by selecting GoldAlarm from* ***Programs*** | ***Startup****.*

```
[GMAlarm]
PageAlarm=1
PageAfter=10
IgnoreSnooze=3
TrayReminder=5
PlaySound=C:\WINNT\Media\notify.wav
```

You now have two more options that go hand-in-hand. ☐ **Place GoldAlarm icon on my desktop** and ☐ **Run GoldAlarm when Windows starts**. GoldMine, when running, takes one license per user, away from the license pool. Contrary to my previous writings, running **GoldAlarm** in the **Silient Mode** does utilize a GoldMine license. The access to this application is through the use of the silent mode switch in the command line start up of GoldMine. For example, that command line, in the icons target field, might look like:

```
G:\GoldMine\GMW.exe /u:DJ /p:Password /s:GMAlarm
```

If the user had selected one or both of these options. There is no UserID.ini setting modified by the selection of either of these options. Their selection of either of these options immediately results in the icon being created on the desktop, and/or an icon being added to the Start-up folder under the Programs section of Windows. If the user selects to ☐ **Run GoldAlarm when Windows starts**, an icon (new icon for GoldMine Premium) will show in the system tray indicating that GoldAlarm is running. This same icon in the system tray will result if the user starts GoldAlarm employing the desktop icon.

FrontRange has taken the liberty of moving another of the GUIless entries into the GUI realm. Those of you who are not new to GoldMine will notice the new **Alarms on by Default** button. Clicking on this button will provide the user with the GUI shown here in Figure 3-26. Let me pull this information from my previous version of this book for your review.

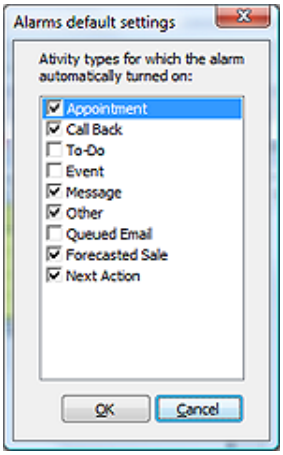


Figure 3-26

■ Scheduled Activities - Alarm automatically selected when scheduling activities

Note

Should the individual set ***OnByDefault*** *for* ***M****, messages, they must be aware that this setting is only applicable to the* ***GoldMine Internal E-mail*** *message, and does not apply to Internet E-mails.*

For instance, let's say that the user wants to have the alarm box, ☑ Alarm, automatically selected whenever they schedule an Appointment, Call, Next Action or a Sale. In order to do this, they would need to add to their UserID.ini, in the section shown:

```
[GMAlarm]
OnByDefault=ACTS
```

Note

Even though GoldMine lists the RecType of ***D = To-do****, the astute reader will realize that there is no option for an alarm when scheduling a To-do manually.*

The user may select any activity RecType to have that activity alarmed by default. GoldMine uses the following RecTypes:

A = Appointment
C = Call
T = Next Action
D = To-do (even though there is no manual check box, this does appear to alarm To-Do's)
M = Message
S = Sales Potential
O = Other
L = Literature Request

My personal settings for this statement are:

```
[GMAlarm]
OnByDefault=ACTSOMDL
```

The reader is reminded that not all RecTypes will be alarmed by default in all versions of GoldMine. Each version of GoldMine has its own idiosyncrasies, so you will need to run a thorough test against your version.

Although one may still modify these settings by hand, FrontRange has now brought a GUI to these Options. Once you click on the new Alarms on by Default to bring up the dialog form shown in Figure 3-26, it is just a simple matter of your checking/unchecking those activities that you want/do not want alarmed by default respectively. As always, once you have made your choices, simply click on the **OK** button.

Lookup

Now I want to move on to the **Lookup** tab. Under this tab, Figure 3-27 on the next page, you have a number of options that directly act upon the **Contact Search Center** dialog form within GoldMine. Whenever the user clicks on the **Search** icon on the GoldMine Toolbar, or selects one of the

Note

Please notice that I did not say, ...or simply double-clicks on one of the ***indexed*** *fields labels. You may now Search on any Contact1/Contact2 field by simply double-clicking on its label. Sweet!*

Note

New, in GoldMine Premium 9.0.2.36, is the ***More Options...*** *button. This build was released after this chapter was finished, hence, this sidebar note.*

New is the ability to change the ***Contact Search Center****,* ***Search by:*** *drop list of searchable fields. For instance: You may now add* ***Details*** *to your* ***Contact Search Center****,* ***Search by:*** *drop list.*

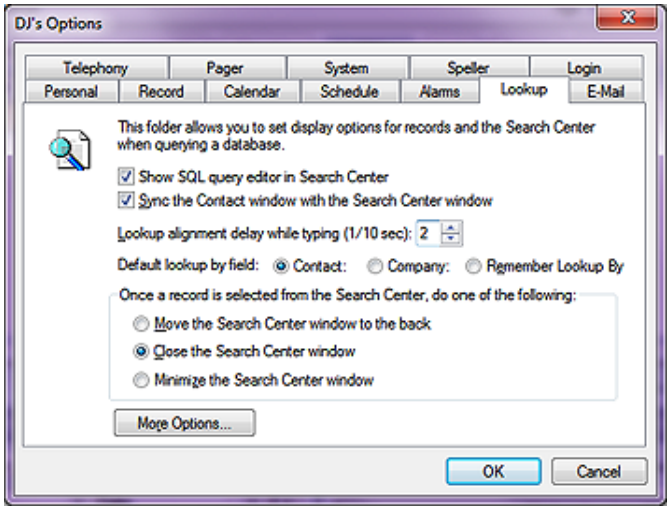


Figure 3-27

choices under the **Go To | Search ► | Contact Search Center** selection from the GoldMine menu, or simply double-clicks on one of the labels, this activity will bring up the Contact Search Center dialog form. Setting the options under this tab will control some of the attributes of that dialog form.

The first option is brand spanking new, and allows for a rather neat display of information. It is to ☐ **Show SQL query editor in Search Center** which is by default not selected.

I want to show you what the results of choosing this option might reveal. Take a look at Figure 3-28 (I had to cut the image for better presentation in this book).

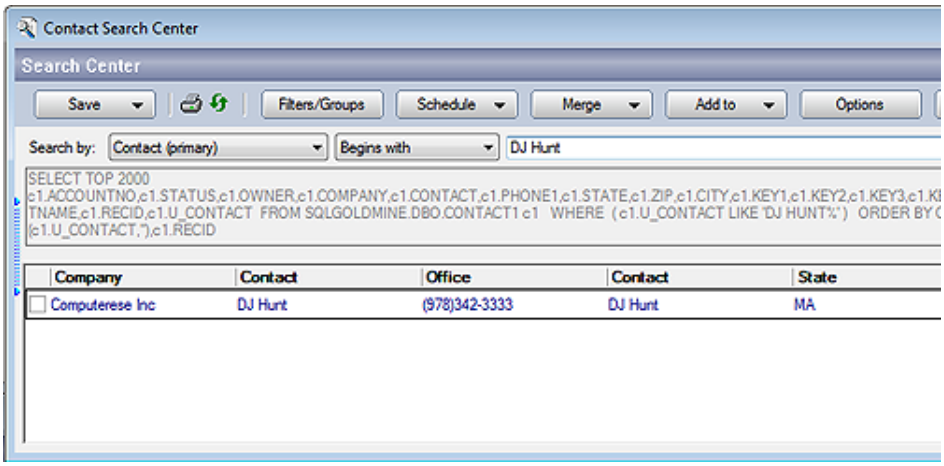


Figure 3-28

This is great. The end user gets to see the SQL Query that GoldMine intends to utilize to achieve their goal, and you can modify the query by clicking on the **Edit** button (not displayed in Figure 3-28).

Look, here is the query shown above:

```
SELECT TOP 2000 c1.ACCOUNTNO,
  c1.STATUS,
  c1.OWNER,
  c1.COMPANY,
  c1.CONTACT,
  c1.PHONE1,
  c1.STATE,
  c1.ZIP,
  c1.CITY,
  c1.KEY1,
  c1.KEY2,
  c1.KEY3,
  c1.KEY4,
  c1.KEY5,
  c1.LASTNAME,
  c1.RECID,
  c1.U_CONTACT
FROM SQLGOLDMINE.DBO.CONTACT1 c1
WHERE  ( c1.U_CONTACT LIKE 'DJ HUNT%' )
ORDER BY COALESCE(c1.U_CONTACT,''),
  c1.RECID
```

This is a nice way of easing your end users into understanding SQL Queries. Do you know what that coalesce() function is doing. I'll bet you will after seeing it used, and having your curiosity peaked.

Recommendation

*The ☐ **Sync the Contact window with the Search Center window** losses all of its value when GoldMine Premium is utilized in its new default Tabbed dialog mode. It would be my recommendation that your users utilize strategically placed dialog screens as has been utilized in previous versions of GoldMine.*

Recommendation

*I always recommend that an organization use a User Override to assure that this is set at the corporate level, selected, and not set as an individual preference. User Overrides are discussed later in the **GM.ini** section of this chapter.*

Note

Remember that you can search on any Contact1/Contact1 field by simply double-clicking on that fields label.

Note

I would like to point out that there is no particular order in which the instruction must appear in the UserID.ini as long as the instructions appear under the appropriate section headings. In fact, each time that a user saves these settings from within GoldMine, they may appear in a different order within the UserID.ini.

Alright then, let's move forward to where you are presented with is whether to ☐ **Sync the Contact window with the Search Center window** or not. By default, the **Contact** record does not move to the highlighted record in the **Contact Search Center** dialog form when the user selects a contact from the listing on that dialog form. The **Contact** record will remain at the last contact that the user was viewing prior to their having brought up the **Contact Search Center** dialog form. As the **Contact Search Center** dialog form only displays a few pieces of information about each contact, the user may find that not enough information is presented for them to be able to determine if, in fact, they have the correct contact highlighted. One way for them to view more information is to have the **Contact** record synchronize to the highlighted **Contact Search Center** record. This would allow the user to view all of the pertinent **Contact** record information, and they would, positively, know that they had found the correct contact. If this is the functionality that the user would desire, then the user would need to select this option.

The next option of interest is **Lookup alignment delay while typing (1/10 sec): xx**. The default value for this option is 2/10ths of a second. When typing in the information that they are searching for in the **Contact Search Center** dialog form, should they stop typing for 2/10ths of a second, GoldMine will execute a fetch call to the SQL database, and retrieve all of the records that meet the criterion specified at that instant with the first match highlighted, and Tagged (☑). The user may wish to change the delay while typing, by increasing or decreasing this value. The GoldMine developers have determined that 2/10ths of a second is an optimal delay when working in the SQL database environment. Less than this, and the network traffic and display results could be impeded, while more could be annoying to most your users. However, GoldMine still allows the user to adjust this delay to their own comfort level. If you are also the Network Administration, you may want to look at my recommendation in the sidebar if your network traffic is taking a hit.

The next user option was a direct result of user requests to the GoldMine/FrontRange organization, and is only applicable when the user brings up the **Contact Search Center** dialog form by clicking on the Toolbar **Search** button. In earlier versions of GoldMine, when the user clicked on the **Find** icon, as it was called then, the **Contact Listing** dialog form would pop up with a **Search by:** order of **Company**. Users inundated FrontRange with requests to make the **Search by:** order default to **Contact**. GoldMine made the change. Low and behold, the complaints again poured into FrontRange. Now, instead of trying to force everyone to one standard, FrontRange has chosen to give the users their choice as to which **Search by:** order it should default to when they, the user, click on the **Search** button. The **Default lookup by field:** ◉ **Contact:** ○ **Company:** ○ **Remember Lookup By** is default set for the contact lookup order, and this is where the user would exercise their choice if they needed to change from the default setting. You old time GoldMine users will notice a change from the past. ○ **Remember Lookup By** is a new addition to the available Options in the Lookup tab of the Options settings as of GoldMine Premium. I don't believe that I should need to explain what the selection of this option will do as it is fairly self explanatory.

The last option on this tab is another radio button selection. As you should be aware by now, GoldMine has one main window, and many, many other windows within that one window. In GoldMine Premium these windows may be kept as windows or the user may opt for the default Tabbed mode. If you are not using the new Tabbed dialog screen layout, then these windows can tend to clutter the main window. The first two possible option choices are applicable when using the Tabbed or Dialog Screen configuration for GoldMine. The third option, however, is not applicable if you are in the Tabbed mode, and is ignored if selected. Assuming that you are not in the Tabbed mode, the **Contact Search Center** dialog form, when activated, pops up as the top level form (over all other active dialog forms). The user must determine what happens to that search center window once they have completed their search. It is here that they make their choice.

Once a record is selected from the **Contact Search Center**, do one of the following:

- ◉ **Move the Search Center window to the back**
- ○ **Close the Search Center window**
- ○ **Minimize the Search Center window**

I believe that these choices are pretty much self-explanatory, and that they do not require any further discussion on my part for this book.

Now that I have concluded my discussion of the **Lookup** tab, I should show you the UserID.ini section, and the instructions that are affected by any changes on the **Lookup** tab.

```
[GM_SEARCH_CENTER]
DefField=0
SyncDelay=2
LookByShrink=0
SelectAction=0
SyncContact=1
ShowQueryEditor=1
```

E-mail

Note

*The **E-mail** tab has probably received the most revamping of any of the **Options** tabs with the release of GoldMine Premium 8.5.0.*

Many of these new features contain no information in the GoldMine Help files, and FrontRange has no documentation as to how to utilize these option settings. I do not have Exchange Server upon which to test these settings so, basically, we're flying blind here people. I will note these sections as we get to them.

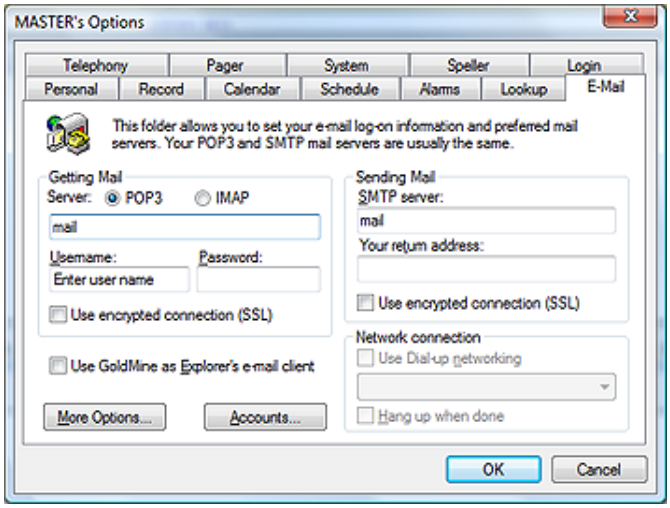


Figure 3-29

The **E-mail** tab is probably the most detailed tab, hence the most difficult to explain and to understand, as there are multiple layers of page frames, colloquially called tabs. This section of the chapter will take better than half of this chapter to explain, so get yourself a big cup of coffee, and hunker down for a long session. Let's start out with the basics first. GoldMine, in previous writings of this book, had only supported **POP3**/**SMTP** mail servers. As of 8.5.0, GoldMine is now capable of using **IMAP** to retrieve e-mail messages from the Mail Server. The **P**ost **O**ffice **P**rotocol version **3** (**POP3**) is the vehicle by which the user retrieves their e-mail, while the **S**imple **M**ail **T**ransport **P**rotocol (**SMTP**) is the vehicle through which the user sends their Internet e-mail. On the other hand, the **I**nternet **M**essage **A**ccess **P**rotocol (**IMAP**) is an application layer Internet protocol that allows the local client to access their e-mail on a remote server. The IMAP protocol is more appropriately utilized for retrieving messages from Exchange Servers without having to configure the Exchange Server with the POP3/SMPT protocols. I'm going to continue on for now, and I'll come back to this at a more appropriate spot in this chapter.

Note

*The ☐ **Use GoldMine as Explorer's e-mail client** option does not appear to function in my environment. I am utilizing:*

***Windows Vista Ultimate** (64 bit)*
***Office 2007** (**Outlook 2007**)*
Internet Explorer 8

On the first screen, under the **E-mail** tab, I am going to suggest that the user only worry about two items. The first of which is whether the user desires to ☐ **Use GoldMine as Explorer's e-mail client**. By default, Microsofts Internet Explorer uses Windows Mail as its default e-mail client, however, where I have Outlook 2007, my system utilizes Outlook as its default e-mail client. The user may desire to remain in a consistent environment when creating or retrieving Internet E-mail. If so, they may wish to select this option. Selecting this option tells Microsoft Internet Explorer to recognize GoldMine as the users Internet E-mail application (see Note in sidebar). The selection of this option makes no entry in the UserID.ini file.

Note

☐ ***Use Dial-up networking**, this option also affects GoldMine Synchronization. GoldMine Synchronization will try to use the dial-up network, if so selected, for doing its synchronization.*

The other section that a user should be concerned with on this tab is the **Network connection** frame. In this section, the user that is not attached to a network environment, may select to ☐ **Use Dial-up networking**. Come on now, does anyone really use this any more?. You may notice that my screen shot, Figure 3-29, has this section disabled. This indicates that I do not even have a modem configured for networking on my system. Users in a network environment do not usually have to concern themselves with this frame. Once selected, a drop-down list will be available listing all of the users configured dial-up accounts. The user should select the account that they want GoldMine to automatically employ when connecting to the Internet. Additionally, the ☐ **Hang up when done** option will be activated, and the user may also select this option.

Selecting these options could cause the UserID.ini to have these settings added:

```
[Internet]
UseDialUp=1
DialUpEntry=My Dialup Account
AutoHangUp=1
```

That's it for this page of the **E-mail** tab. From here, I would suggest that the user click on the **Accounts...** button which will bring up the dialog form shown in Figure 3-30 on the next page. It is from this dialog form that the user should manage their various accounts. You may establish quite a few accounts for number of different activities. Let's concern ourselves with the one account that is somewhat preset by GoldMine, and is designated by the green ball icon as the default account. The user may choose their own default account, as I have done, after they have added more than the one account. Let's start by having you highlight the one account that is shown, and then clicking on the **Edit...** button. This will bring up the dialog form shown on the next page in Figure 3-31.

This dialog form should be new to our old timers as well as our new readers. The first thing that I want the user to do is to give this account a descriptive **Account Name:** which will appear in the **E-mail Center** under the centers **Online** branch folder displayed in the navigation bar to the left. This name should be simple, yet clearly identify the account. As this account is currently set as the default account, it will appear in bold when viewed in the E-mail Center under the centers Online branch folder.

Note

Within GoldMine, it is possible for a user to set up as many as 256 different accounts from which they can retrieve/send Internet e-mail.

If you look at Figure 3-30, you'll notice that I, myself, have many accounts that I monitor. Some of these, I will actually be auto-retrieving such as my WebImport account, while others, my partner consultants, I will just be monitoring when they are not available.

Tip

*Should the user have the **Online** branch folder selected prior to entering their **Options** / **E-Mail** tab they will notice that the tab is disabled, and that they are unable to make modifications.*

*Insure that you are on the **Inbox** branch folder in the E-mail Center prior to attempting to modify your E-mail Options.*

☑ **Show the account in the E-mail Center** is disabled for this selection as this is the users default account. Should the user add more accounts, this option will become available on each account, and the user may then choose to show an account or not in the E-mail Center. Why would one setup an account, and then opt to not display it? The default account is always displayed in the E-mail Center, and this option will always be disabled for the default account. As the user is taking the time to set up the account, they would probably want to have the account available in the E-mail Center.

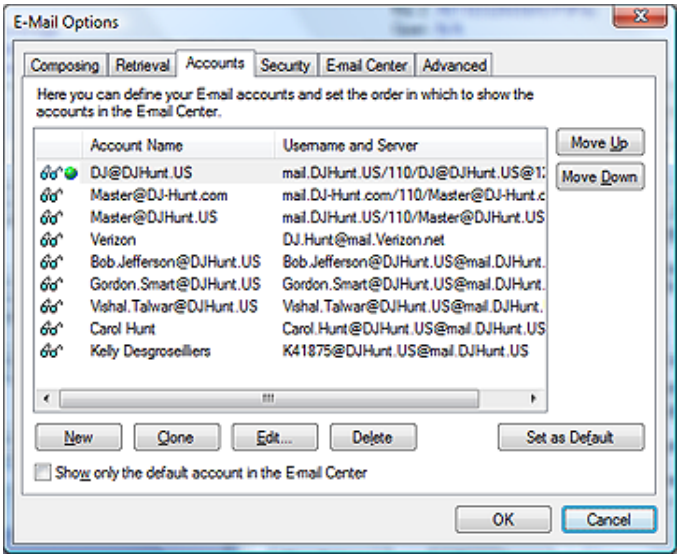


Figure 3-30

Next in turn is the **Getting Mail** frame, and here is where we go astray from our previous Options in prior builds of GoldMine Premium. The user is first required to identify type of Server from which they will be retrieving their e-mail, and, in this case, they may opt for either ◉ **POP3** (default) or the ○ **IMAP** server. Now they must identify the **Server:** name for this account. GoldMine will accept this as either a name or as an IP address. Users who do not possess this information, may acquire the necessary information from their GoldMine Administrator, their Network Administrator or their **I**nternet **S**ervice **P**rovider (**ISP**). A typical name construct would be similar to mail.DJHunt.US, while the IP address syntax might look like 216.149.153.109 or, in my case as I use K9 for spam control, 127.0.0.1. Again, either is acceptable in this field as long as it is a valid entry.

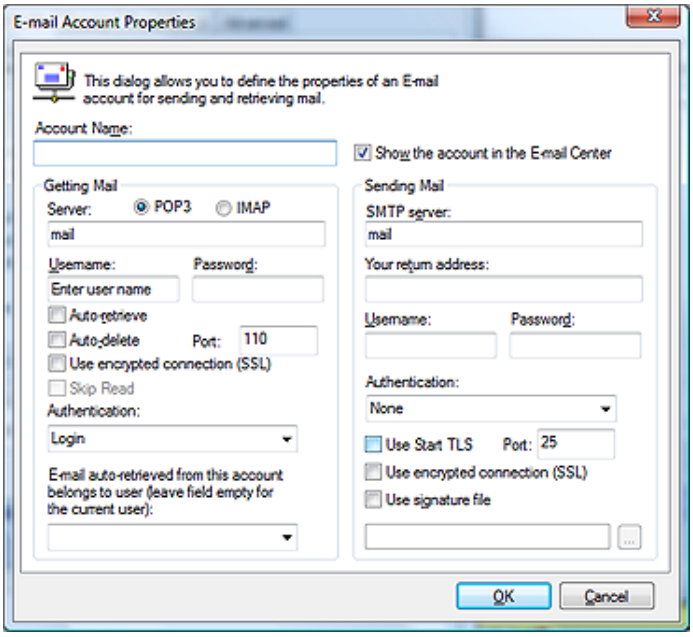


Figure 3-31

Tip

***K9** is a Shareware utility for Spam control that works well with GoldMine POP3 configuration, or any POP3 client configuration for that matter.*

*You may download it for free at **Keir.net**. I liked it so much that I made a $30.00 donation to their cause some 7 years ago when I first started using it with GoldMine.*

Tip

Should the user fail to connect to their account after having set up the account, the user should first try to re-enter their password. I have found that, because of the lack of password confirmation, the user frequently has a typo in their password, and careful retyping usually corrects the matter.

The next required field in the Getting Mail frame is the **Username:** field. Here, the user is expected to enter the user name that is required when logging into this account on the Server. This is normally only a user name, and not the users entire e-mail address, although it very well could be the entire e-mail address. An example of the user name, in one particular case that comes to mind, is DJ, while another, for my K9 configuration, was mail.DJHunt.US/110/DJ@DJHunt.US. The user would need to have this information, which may come from the Network Administrator, the GoldMine Administrator, or the users ISP.

Along with the username, there is usually a required **Password:** which must be entered in order to log into the account to retrieve e-mail. As the user types the password, only asterisks will be displayed. Additionally, there is no password confirmation field, such that the user should be very careful and very conscious of what they are typing into the password field. Remember that passwords are usually case sensitive.

Next, we see that there are two familiar options, ☐ **Auto-retrieve** and ☐ **Auto-delete**. These two options work hand-in-hand with each other. If the ☐ **Auto-retrieve** option is selected, GoldMine will attempt to log into the users account, at a pre defined interval (refer to the **Retrieval** tab discussed

Tip

When a user starts to complain about receiving the same message over and over again, it is usually because the user has set their accounts to Auto-retrieve, but have failed to set the Auto-delete option.

*Should the user select the ☐ **Auto-retrieve** option, they would be wise to also select the ☐ **Auto-delete** option.*

later in this chapter), and will retrieve any e-mail that is on the POP3 mail server. GoldMine will retrieve e-mail for all set up accounts that have this option selected. Should the user select this option, but refrain from selecting the ☐ **Auto-delete** option, then a copy of e-mail will be retrieved from the e-mail server while the original e-mail message will remain on the POP3 server. GoldMine does not mark the retrieved messages, on the server, as having been read. It is important to understand this action. This particular setting could result in the same message being retrieved multiple times into the **E-mail Center**. Selecting the ☐ **Auto-delete** option will result in e-mail being removed from the **Internet Mail Server** upon successful retrieval into the GoldMine **E-mail Center**.

Within the Getting Mail frame now are some new options. I speak specifically of the **Port:** value, and the ☐ **Use encrypted connection (SSL)** option. Now the **Port:** value used to appear on another dialog form in prior builds of GoldMine, however, is given a more prominent focus in GoldMine Premium 8.5.0. As an example, I utilize port 9999 in my configuration for K9. As for the ☐ **Use encrypted connection (SSL)** this is what the GoldMine help files have to say about that: *Select this checkbox to use a secure connection. This ensures the privacy of the connection between your account and the server. Enabling SSL does not verify the identity of your account or the e-mail server, but does prevent a third party from listening or recording messages sent between them.*

If you have chosen to use the IMAP configuration, you will also be able to set individual account options for the ☐ **Skip Read** capability. This item used to be a POP3 general setting under the **Retrieval** tab, and still is quite frankly, however, IMAP permits the individual account configuration for this option. Not having the IMAP capability, I cannot test this out for you, however, I can assure you that selecting this option under the **Retrieval** tab for the POP3 configuration really had no effect.

And next is the **Authentication:** type droplist which varies depending on whether you have selected POP3 or IMAP. This frame allows the user to tell GoldMine which protocol to use for the account and password on the Internet mail server the POP3 or IMAP. Under POP3 your options are:

Login
NTLM

While IMAP offers the additional login type of:

CRAM-MD5

The proper selection of the authentication type is important, and although it is a user option, it is not determined by the user. The protocol the user must employ is determined by their Internet Service Provider. The user must acquire this information from their GoldMine Administrator, or, in the absence of a GoldMine Administrator, directly from their ISP or their Network administrator.

Tip

Many users desire the abiltiy to send e-mail messages using different return addresses. Here is how they would set up the various accounts to accomplish this feat.

*Set up one **Account** for each desired return e-mail address. The **Getting Mail** side may be the same or different for each account, it matters not. (If the **Getting Mail** side is the same for multiple accounts, only the first account needs to be considered for **Auto-retrieve** and **Auto-delete**).*

*However, on the **Sending Mail** side, in **Your return address:** they should be set up differently for each desired return address. I strongly recommend that the return e-mail address be entered in a format similar to:*

DJ Hunt <DJ@DJHunt.US>
Carol Hunt <Carol.Hunt@DJHunt.US>

*Now the proper name, and the e-mail address will appear in the **From:** field of the outgoing e-mail when selected. That's right, the user must select the correct **From:** account from the available drop list on the e-mail message. This cannot be done automatically.*

Now we come to: **E-mail auto retrieved from this account belongs to user (leave field empty for current user):**, and this too used to be elsewhere within the GoldMine Options. This permits users to configure an account, usually set for Auto-retrieve, for another user, for instance while they are away, so that the active user can retrieve the E-mails for said user, and have these E-mails retrieved to the away users account within GoldMine. There are many other uses for this section (WebImport comes quickly to mind), however, I leave this usage to your imagination. The associated drop list will display all of your configured UserIDs.

We now want to move ahead and discuss the **Sending Mail** frame, and again refer to the previously displayed Figure 3-31. In this frame the first field that the user encounters is the **SMTP server:** field. The **S**imple **M**ail **T**ransport **P**rotocol (**SMTP**) is the protocol by which the users e-mail is sent from within GoldMine. Most commonly, regardless of how many accounts the user has, they will only have one SMTP server (see Tip in sidebar). It is not atypical for an ISP to name the POP3 server and the SMTP server with the same name, but this does not hold true in all cases. Again, the user must acquire this information from their GoldMine Administrator, or, in the absence of a GoldMine Administrator, directly from their ISP or Network Administrator. In my case, for instance, the POP3 server is named mail.DJHunt.US while my SMTP server is named mail.authSMTP.com. Why the difference you might ask? Well, mail.authSMTP.com is a paid SMTP service which permits me to eBlast up to 10,000 e-mail messages per month (you may select from different plans), whereas, my Verizon account was limiting me to 100 messages per hour or a maximum of 500 messages per day. I found this to be too constraining for my needs. If you do a lot of eBlasting, you too may want to consider using one of the SMTP services like www.authSMTP.com.

In **Your return address:** field, the user would enter this accounts user e-mail address. As we have alluded to, the e-mail address is usually, but not always, a combination of the username and the domain name. A typical address could be: DJ@DJHunt.US. In case the user wants a different name associated with the e-mail address, the return address should be entered thusly:

DJ Hunt <DJ@DJHunt.US>

Now we are asked for two more pieces of information. GoldMine needs the SMTP **Username:** and **Password:** which for my authSMTP account would be **ac28103** and ********** respectively (you didn't really think that I was going to give you my password now did you?). Now you older GoldMine users will remember that all of this information was presented to you under the advanced options area of previous GoldMine Premium builds.

So we must now be concerned with SMTP **Authentication:**, and, unlike POP3/IMAP Authentication, this drop list is not affected by you selection of POP3 or IMAP. Here are your choices:

Auto
None
Login
Plain
NTLM
CRAM-MD5

Personally, authSMTP requires **Login** authentication so that is what I would select for my environment.

Okay, I have to be honest here, with nothing in the GoldMine Help files, I had to find out about the ☐ **Use Start TLS** option via a Google Search. Here is the results of my search.

The Transport Layer Security (TLS) protocol provides communications privacy over the Internet. The protocol allows client/server applications to communicate in a way that is designed to prevent eavesdropping, tampering, or message forgery.

If it is determined that you have a need for TLS then you will also need to define the TLS **Port:** which is defaulted to port 587. Should you need to use the TLS protocol, you will not be able to use the next option which is to ☐ **Use encrypted connection (SSL)**. It is one or the other, and not both protocols. This is the same protocol that you may have used for retrieving your E-mails in a secure manner. From the GoldMine Help files:

Choosing this option will also cause a switch to a dedicated secure connection port number on the SMTP server.

Lastly is an option selection to ☐ **Use signature file**. Now I want to be clear here, that the selection of this option pertains to the inclusion of a signature text file into all of the users outgoing e-mail messages utilizing this account. The words **text file** are the key words in that sentence. GoldMine Premium allows the option of using HTML e-mail. I will discuss that later, but, if the user plans to use HTML e-mail, then this option should not be selected. Even if selected, should the user be using HTML e-mail, this option will be negated. Today,almost everyone is utilizing HTML Templates, and I'm surprised to see that GoldMine is maintaining this legacy option.

Regardless, should the user decide to select this option, they would then be expected to point to the location of the signature text file. They could do this by typing in the fully qualified path and name of the text file, or by clicking on the ellipsis (**...**) button, and browsing to the file. The end result must be the fully designated path and file name of the signature text file. One could expect to see a name such as **G:\GoldMine\EMail Sig\Generic.txt** in this field.

If I look at this section of the UserID.ini, with this information included, I might see:

```
[Internet]
UseDialUp=0
POP3_Account=DJ@DJHunt.US
POP3_Server=127.0.0.1
POP3_User=mail.DJHunt.US/110/DJ@DJHunt.US
Return_Address=DJ Hunt <DJ@DJHunt.US>
SMTP_Server=mail.authSMTP.com
DelServerMail=1
AutoGetMail=1
SMTP_User=ac28103
POP3_Pass=02443B221D5845405B22BE8F0242236E69714548BA8B8D8F
POP3_Port=9999
SMTP_AuthMode=1
SMTP_Pass=0244606F1D5845405B22BE8F0240726B696AB687898B8D8F
IN_Server_Type=1
IN_OverSSL=0
OUT_OverSSL=1
SMTP_StartTLS=0
SMTP_Port=587
UseSigFile=1
SigFile=Y:\GoldMinePE\eSignature\Generic.txt
```

Note

You may read about the TLS protocol yourself by visiting:

ftp://ftp.isi.edu/in-notes/rfc2246.txt

Recommendation

*Use HTML templates for a more acceptable corporate image. Few people or organizations use Plain Text e-mails any more. Create a separate default **New**, **Reply**, and **Forwarding** e-mail template for each user signature required.*

Do not let the users create these independently as a corporation you would want to present a consistent and professional look to your clientele.

Note

*These settings, except for the **UseSigFile**, and **SigFile**, are my settings for using this account with the spam killer K9 (**www.keir.net**). I highly recommend this product as a spam killer for your **GoldMine E-mail Client**.*

Note

*Note that the variables **POP3_Pass** & **SMTP_Pass**, which contain the account password, is encrypted. Passwords may only be entered through the GUI in GoldMine, and must never be added to the UserID.ini directly.*

As the user adds subsequent accounts, this section will be appended to as many times as the user has accounts. The variable names will change to indicate the order of the account. For example, subsequent POP3 account variables will be named POP3_Account1, POP3_Account2, POP3_Account3, etcetera. This, then, pretty much sets up an Internet E-mail Account.

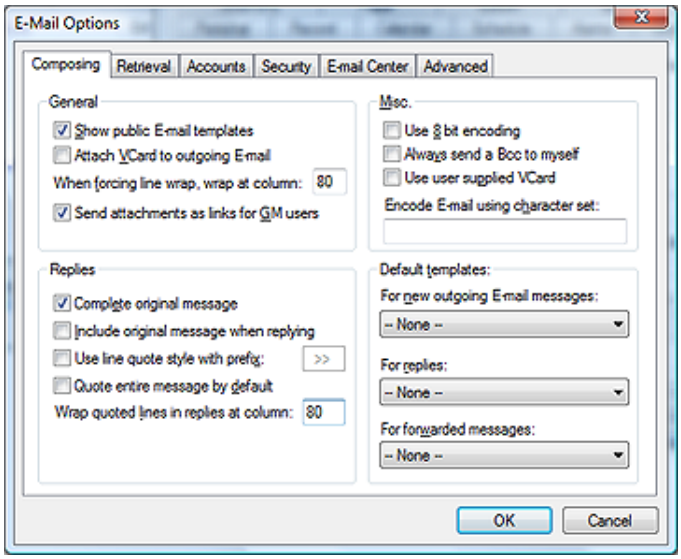


Figure 3-32

With this being accomplished, the user will have successfully set up one Internet e-mail account. They may now continue on and set up all of the additional accounts to which they have access. I would now ask you to refer back to Figure 3-29. From there, we would continue with the setting up of the options on the **E-Mail** tab. Notice that there is one last button that I have, as yet, not discussed, that being the **More Options...** button. Clicking upon this button will produce the dialog form as shown here in Figure 3-32.

The reader will immediately notice that we have encountered another dialog form containing 6 tabs from which the user may set many more Internet options. Actually, it is the same 6 tabs as shown in Figure 3-30, however, I am entering this dialog form from via a different avenue. On this, the **Composing** tab, alone, there are 4 different option frames. They are the **General**, **Replies**, **Misc.**, and the **Default templates:** frames.

I begin with the **General** frame, and the users first option is to ☑ **Show public E-mail templates**. As you can see, this option is selected in the default state. As a user adds e-mail templates in the **Document Management Center**, their templates are available for use by a user when composing a new Internet E-mail message for instance. Having this option selected means that, not only will this users templates be displayed on the list when composing an Internet E-mail, but also any templates that were created for the user group **(public)** will be displayed at the same time and be available for immediate use. As stated previously, at any point a user may access and use the templates of any other user from the template drop list. Why wouldn't you want the user to have the widest available selection of templates available, hence, this option is checked by default.

☐ **Attach VCard to outgoing E-mail** is an option that is not selected in the default state. Think of the VCard as a virtual business card (why not, that's what it is). It could be an attachment that is sent with every e-mail that the user sends out. It contains information from the **Personal** tab of the users **Options**, as well as information that is contained within the licensing of the GoldMine product. Here is a sample of the contents of a typical users VCard:

```
BEGIN:VCARD
VERSION:2.1
ORG:Computerese;Application Development
FN:DJ Hunt
N:Hunt;DJ
TITLE:Owner
ADR;WORK:;;150 Pratt Road;Fitchburg;MA;01420;USA
TEL;WORK;PREF:(978)342-3333
TEL;WORK:9783423333
TEL;FAX;PREF:
TEL;FAX:
EMAIL;PREF;INTERNET:DJ@DJHunt.US
END:VCARD
```

If the receiver has a system that is VCard capable, the system can decipher the information contained in the **.vcf** file. The deciphered information could then be easily, if not automatically, imported by the receiving application. GoldMine is VCard enabled, as is Microsoft Outlook. Each of these applications could use the VCard information to create a new Contact record. It is my experience, however, that few people take advantage of the VCard capabilities, hence negating its value. Should the user select this option, GoldMine will create a text based VCard, see above, for the user in the **...\Template\UserID** folder. For the card shown above, the path would be: **C:\ProgramData\GoldMine\Template\DJ\DJ.vcf**

Tip

*There are VCard creators available that create graphical VCards. Should the user decide to use one of these applications to create a VCard, they must put the resulting VCard in the **...\Template\UserID** folder. The file must be named with the UserID plus have the **.vcf** extension.*

*It is important, should the user select this approach, that they also select the option ☐ **Use user supplied VCard** which is in the **Misc.** frame of the **Composing** tab. This will prevent GoldMine from updating the VCard with its self contained user information.*

The next setting, however, is **When forcing line wrap, wrap at column: xxx**. When forcing line wrap is sort of ambiguous, GoldMine always forces line wrap. If the user doesn't change the default setting, then GoldMine will force the line wrap, in the body of an e-mail, on the 80th character typed on a line. This is a standard setting that many e-mail clients employ.

Old time GoldMine users may notice the absence of the ☐ **Use signature file:** option. FrontRange is pushing for the use of HTML E-mail Templates, and wants to get away from the Plain Text signature files. I will discuss HTML E-mail templates later in this chapter. I find that most organizations prefer the HTML capabilities anyway, and appearance that could result from the use of HTML templates.

Recommendation

*It is my opinion that you should **never** send **GoldMine E-mails** to **GoldMine Users**. You should always have a record for your employees in your GoldMine database, and you should always send them an **Internet E-mail** as opposed to GoldMine Internal E-mail eliminating the need for the use of this option all together.*

On the other hand, we still have the ☑ **Send attachments as links for GM users** option, which is the next, and the last option in the **General** frame, and, as in the past, it is selected by default. When the user composes an e-mail message that contains attachments, and then includes GoldMine users either as **cc:** or **bcc:**, if this option is selected, those GoldMine users will receive the path information to the attachment as opposed to receiving the attachment itself. It has been my experience that the selection of this option is the cause of an inordinate amount of frustration. How frustrating is it, for instance, when you receive an e-mail that has a link to an attachment in a path that is not accessible to you, the recipient? Even though having the attachment included as part of the Internet E-mail increases the size of the e-mail, in my opinion, it is better to have the attachment, than to not have access to the attachment at all. Naturally, these are user preferences, and the ultimate decision rests with the individual setting these preferences.

That concludes my discussion of the General frame. The resulting UserID.ini settings from this frame could look something like these:

```
[Internet]
LoadPublicTemplates=1
SendVCard=1
ForceWrapAt=80
GMAttachAsLinks=0
```

Continuing on, see Figure 3-32, I begin with a new frame that is called **Replies**. This frame has five options that control items that users can modify pertaining to their replies to an Internet E-mail.

The first option is selected by default, ☑ **Complete original message**. This option simply instructs GoldMine, when selected, and it is checked by default, to **Fast File** in History (ContHist/Mail-Box) the received message, after the user has relied to said message. No user interaction is required to Complete the incoming Internet E-mail message to send it to History, if this option is selected. The downside to this might be that there is no user interaction, therefore, the user can not add any Notes, Activity Code, or Result Code to the historical activity unless they edit the historical activity after it has been created. I have found, most often, that the user would not want to, nor need to, add notes to a historical activity for a received message, as the message, subject, and body usually provide satisfactory historical information. Therefore, most users will not change this default selection.

Recommendation

As this feature does not appear to work except in plain text mode (even that is questionable), and as I always recommend using HTML templates, I would recommend that the user not be allowed to select this option.

The option to ☐ **Include original message when replying** had been added in GoldMine version 6.00.21205, and is still retained today. The release notes for this feature stated (there is nothing in the GoldMine Help files even as of GoldMine Premium 8.5.0.89) that this option is for Outlook style original message quoting with color coded replies. This setting is independent of the ☐ **Quote entire message by default** option, and quoted replies will use a color coded cycle of blue, red and green. In my testing of this feature, it was found to only work if the user were not using templates, defined later, in the **Default templates:** frame under the Composing tab. This option has never worked properly, and is now not selected in its default state. With FrontRanges push to use HTML Templates I'm, quite frankly, surprised that FrontRange even left this option in the GUI.

The next item is an option, and a setting combination. The user must decide to ☐ **Use line quote style with prefix: >>** or not. If one leaves this option unselected, quoted text, in a reply, will be enclosed by opposing chevrons similar to this:

> This is the quoted text portion
> of the reply <

Where as, if the user selected this option with the default prefix, then each line of the quoted text would be prefaced with the prefix similar to this:

>> This is the quoted text portion
>> of the reply

The user may get as creative as they wish with the prefix, and I have seen some pretty elaborate ones in my day.

Note

*In my usage, I always select only those portions of the body that I want quoted in my reply, therefore, I do not choose to select the ☐ **Quote entire message by default** option.*

*It really and truly comes down to users usage, and the setting of the user **Options** to accommodate said usage.*

Note

*Because of the unusual representation of the wrap statement, I would like to emphasize its spelling: **WrarReplyAt**. I don't pretend to understand the reasoning behind this syntax, I only document it as it was unexpected.*

Note

*One thing that I have eluded to, but never stated (I believe) is that if one accepts a default option as is, then there may be no entry in the **UserID.ini**. For Instance: **QuoteAll=1** will appear in the UserID.ini, whereas, **QuoteAll=0** may not. Is it wrong if you include **QuoteAll=0** by hand? Certainly not, and it will function perfectly well.*

The next option could be an important one for the user. If the user selects to ☐ **Quote entire message by default**, then each time the user replies to an Internet E-mail message, if the user hasn't selected (highlighted) any text in the original message, everything in the body of that message will be requoted in the reply message with the designated prefix for each line. This could get quite confusing. Most often, I have seen that users do not select this option, and are very careful to select (highlight) only that portion of the message that they wish to have quoted in their Reply E-mail message.

The last setting in the **Replies** frame is similar to a setting that I discussed in the **General** frame. Here the user is instructing GoldMine as to where to wrap any quoted text in the reply message. The default setting is to **Wrap quoted lines in replies at column: 80**.

Making changes in the GUI to the **Replies** frame could result in the UserID.ini looking similar to:

```
[Internet]
CompleteOnReply=0
NewQuoteStyle=0
QuoteString=" >>"
QuoteAll=1
IncludeOriginalInReply=1
WrarReplyAt=80
```

The next frame is rather interesting, at least in the build that I am writing against. The frame is **Misc.**, and the observant reader will notice that frame has been given a hot key. I have no clue as to reasoning behind the hot key functionality, but it is there, none the less. Alt-M drives the selection cursor to this frame, but selects nothing. If there is some logic here, it has certainly eluded me.

The first option in this frame is to ☐ **Use 8 bit encoding**, and I won't even pretend to understand what selecting this option accomplishes. Instead I will supply the reader with the information contained in the GoldMine help file. *"**Use 8 bit encoding:** Converts 7-bit encoding into 8-bit encoding. Useful for international GoldMine users."* I don't know where or when this would be applied, only that it is available as an Option. There is a little hint there that it may be useful for my international readers so if any of you know how this helps you, please send and e-mail along to **DJ@DJHunt.US**.

Moving on, we have the next option which is to ☐ **Always send a Bcc to myself**. Selecting this option will cause GoldMine to send a Blind courtesy copy of the outgoing message to that users e-mail account. This is rather redundant as a copy of the message is saved to history on the contacts record, and in that users E-mail Center, however, it is a feature of which the user may want to take advantage. Just because I don't want to fill up my mailbox doesn't mean that another user would be of that mind set.

Note

In older versions of GoldMine, one could achieve this same result by creating their VCard independantly. Placing it in the correct folder under GoldMine, and making the file Read Only.

Next we have another option whose function is not at all clear, at least to me, and that is to ☐ **Use user supplied VCard**. Now, if I were just reading the option, and using that as my basis for a description, then I would assume that the user could create a VCard external to GoldMine and use that VCard without having GoldMine overwrite the file with its own VCard. That is assuming that the user selected this option. On the other hand, if I look at the information supplied in the GoldMine help file: *"**Use user supplied VCard:** Ensures the VCard attached to your outgoing e-mail includes updates."*, this leads me to a totally different understanding. My testing of this option seems to support the first explanation. If the user has created a VCard external to GoldMine, said VCard must still be named UserID.vcf (i.e. **DJ.vcf**), and must still reside in the **...\Templates\UserID** folder, however, with this option selected, it would appear that GoldMine will no longer try to create its own version of the VCard, and will not try to overwrite the users supplied VCard vcf file.

The last setting in the **Misc.** frame is to **Encode E-mail using character set:**, and it is up to the user to designate the character set to be used if they desire anything other than the default character set to be used for encoding. It would be important for the user to select a character set that is common to all systems for the decoding, of any so encoded message, to be able to function properly. For example, to use the Western European character code, type iso-8859-1. If left blank, GoldMine uses the local default character set for encoding.

Selecting all of the options in the **Misc.** frame could produce a UserID.ini section similar to:

```
[Internet]
Use8BitEncoding=1
BccToSelf=1
KeepUserVCard=1
MailCharSet=iso-8859-1
```

The last frame that the user encounters on the **Composing** tab is the **Default templates:** frame. Notice, again, that there is a hot key for this frame within GoldMine Premium. If the user has created E-mail Templates, or if the user has elected to show and use Public E-mail Templates, then the user may set, in these settings, those templates to be employed under each condition. The user can not

type into these setting areas, hence they must choose from the list of available templates. The circumstances for which the user may set the usage of a template, and their corresponding UserID.ini statement are:

For new outgoing E-mail messages:

DefaultTemplate=DMDSD7W*;!9UR#Y

For replies:

DefaultReplyTemplate=DMDSD7W*;!9UR#Y

For forwarded messages:

DefaultFwdTemplate=DMDSD7W*;!9UR#Y

To the right of the equal sign (**=**) in each of the UserID.ini statements is the **RecID** for the E-mail Template selected for that category. As this value is not encrypted, in theory, the UserID.ini could be modified by hand if the modifier was aware of the **RecID** for the particular template in question.

WARNING

*If the user is not using templates for any of these categories, then the template field for those not being employed **must** be set to **-- None --**. Having a blank in any of these fields means that GoldMine is trying to use a template with an empty title. This has been the cause of many a GoldMine Administrators nightmares.*

Note

*These items might be more easily established through the Document Management Center, now a dialog form simply named **Documents**. The user can simply right-click any template there, choosing the **Set as Default ► New Message** option, or either of the other two possibilities.*

The **Retrieval** tab is next in our order of progression, Figure 3-33. Under this tab we see two frames, and a separate settings area below these frames. The first frame that I will discuss is the **Retrieval Options** frame, and the first option in this frame is to ☑ **Open 'Read E-mail' dialog on retrieval**. This option is selected in the default state. The result of selecting this option will be, as the user downloads their e-mail messages, after the first message is retrieved, that first message will pop up immediately in the **Read E-mail** dialog form. If there are more messages being retrieved after the first message, then they will continue to be retrieved in the background while the user is reading, and processing the first message.

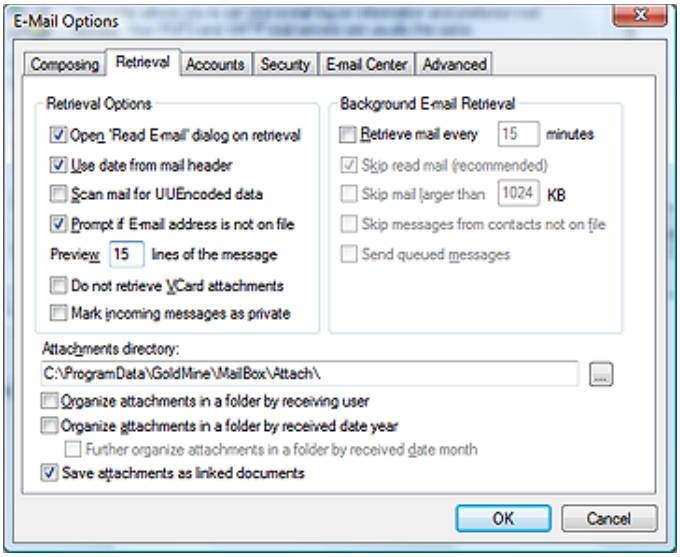


Figure 3-33

Recommendation

Should the user accept this default setting, they are advised to not select Messages in the Auto Roll-overs grouping under the Calendar tab.

☑ **Use date from mail header** is, again, selected in the default state. Any e-mail received, with this option selected, will have the GoldMine **Cal.OnDate** field stuffed with the sent date contained within the e-mail header information. This will mean that the e-mail messages will be posted to the users calendar, and presented in the **E-mail Center** in their true chronological order. If the user does not select this option, then all of the e-mail that is received will have the **Cal.Ondate** field stamped with the date on which the e-mail was retrieved.

The users next option is to ☐ **Scan mail for UUEncoded data**, and this option is not selected in the default configuration. Should the user select this option, it will have no affect on the retrieval of MIME encoded files, however, it will cause GoldMine to scan the Internet Mail Server for any e-mail messages that contain UUEncoded attachments. We're not sure why the GoldMine product would not ship with this as a default selected option as it does nothing but enhance the capabilities of GoldMine as an e-mail client.

In the next option, the user may choose to have GoldMine ☑ **Prompt if E-mail address is not on file**, and this option is selected in the default configuration state. Part of what is inherent in GoldMine is its ability to have all information about a contact linked to the contact record. On incoming e-mail, GoldMine, to function as it would like, will want to link the Internet e-mail message to a contact record. With this option selected, if GoldMine cannot find that e-mail address in its tables, GoldMine will prompt the user to create a new record, or to find an existing record to attach this e-mail message, as well as additional options. If the user does change the default for this option, GoldMine, if it can not find the e-mail address in its tables, will simply not link the message to any contact record. It would then be the users responsibility to link the message by hand to the appropriate contact record, or not, as the GoldMine Administrator dictates. I would mention that this option only functions when se-

lected, and the user is retrieving their e-mail interactively. If **Auto-retrieve** is selected, and retrieving the e-mail, no user prompt will be displayed, as there may be no user for which to display the dialog form. After all it is supposed to be automatic (as long as GoldMine is running).

In the next setting the user is establishing how many lines of an e-mail message are to be previewed in the **E-mail Center** preview window. This setting is rather nice as it allows the user to preview the e-mail message in the **E-mail Center** prior to even downloading it from the **Internet Mail Server** if they so choose. In the **Preview xx lines of the message** the user may choose to preview more or less than the default 15 lines. I have seen many users set this value up very high so that they can preview nearly every message in its entirety while it is still on the **Internet Mail Server**. It is not uncommon for users to set this number to 100 lines. In fact, I too have mine set to 100 lines. Aren't User Options great? We all get what makes us most productive.

In this same frame, the next option is, by default, not selected. This option, ☐ **Do not retrieve VCard attachments**, when not selected, means that GoldMine will not download any VCards as it downloads the corresponding Internet e-mail message. This means that, should the user need to create a new record with which to link the e-mail message, the VCard information will not be available for the creation of the new record. The user will be required to add the information for the new record by hand, typing the information into the record or copying & pasting the information from the e-mail itself. The downside to selecting this option is that the user could fill a hard drive with VCards that are no longer required. I'm glad that's a user option. Personally, I have not accepted the default, and, in some cases, I have employed the VCard when creating a new record.

The last option contained in this frame is to ☐ **Mark incoming messages as private** which is not selected in the default configuration. Selecting this option would mean that only those users that possess Master Rights, and this user would have the ability to read the text of an incoming Internet E-mail Message to this user. Usually selecting this option would be contrary to the usage of GoldMine as it was intended. All users that must deal with the contact should have access to all of the information that was generated with regard to the contact. However, there are times that privacy is a must. I would suggest that the user not select this option, and that, in those few cases where privacy must be maintained, the user take the time to mark the individual message as Private. There is an icon in the **Read E-mail** dialog that will make the message **Private**. Just click on the **Make Private** icon in the **Read E-mail** dialog.

This, then, concludes the **Retrieval Options** frame, and could result in the following possible settings being stored in the UserID.ini:

```
[Internet]
ReadOnGet=0
UseHeaderDate=0
UUEncodeScan=1
LinkOnGet=0
PreviewLines=100
KeepUserVCard=1
MarkIncomingAsPrivate=1
```

Now we can move right on to the frame that covers **Background E-mail Retrieval**. The user will notice that all of the options, save the first option, are greyed out (disabled) in the default state. All of the other options are dependant upon the user selecting the ☐ **Retrieve mail every xx minutes**. In fact, if the user set up to **Auto-retrieve**, under the **Accounts** tab which I discussed previously, then GoldMine has already predetermined the Auto-retrieve interval.

In the UserID.ini, the user should already be able to see an entry like:

```
[Internet]
GetInterval=15
```

Recommendation

I never recommend an interval of less than 5 minutes. No matter how tempting the urge, do not reduce the interval to 1 minute or you will end up with retrievals colliding into each other eventually.

Therefore, if the user has already selected to Auto-retrieve, then the user would be wise to define the message retrieval interval by selecting this option. Once this option is selected, all of the other options in this frame will become enabled for the users choosing. The user should be aware that the lower the interval number the more the network traffic will be increased. Should the network traffic prove to be an issue, then the user may be requested to increase the interval by their Network Administrator or their GoldMine Administrator.

Note

*GoldMine does not mark messages on the Server as having been Read when they are downloaded. Even checking this option, if the user has not selected **Auto-delete**, then they will download the same message over and over and over again until they do eventually delete the message from the server.*

The next option that should be enabled now is to ☑ **Skip read mail (recommended)** which, as the user can clearly see, is selected by default, and is (recommended) by GoldMine. Accepting the default setting would tell GoldMine, should there be any read e-mail on the Internet Mail Server, that GoldMine should ignore those messages, and to not download them again. However, if the user had set the option, under the **Accounts** tab, to **Auto-delete**, then this would be a moot point as all e-mail that was downloaded from the server should be deleted from the server, and should not appear on the mail server as a read message (refer to sidebar Note). It is redundant, but it has no side effect

that should be of any consequence. I would like to point out, again, that these settings are only in effect during the **Auto-retrieval** of e-mail messages. The user will still be allowed to download the read messages from the server by request, if they maintain this option setting.

The users next option/setting combination is ☐ **Skip mail larger than XXXX KB**, and the user can see that the default size is set to 1024 KB. Frequently, the user will be sent large e-mail messages. To Auto-retrieve all of those messages could quickly fill up a hard drive as well as take an inordinately large amount of time. With this option select, the user will have the ability to control which of those large messages should be downloaded, and which should just be deleted. With the GoldMine capability to Preview Internet e-mail messages, while they reside on the server, the user could easily cull the pertinent messages from the advertisements.

Now the user has the ability to ☐ **Skip messages from contacts not on file**. During the Auto-retrieve process, the user may not want to receive messages automatically from unidentified contacts. GoldMine stores all Internet e-mail addresses in the ContSupp table, and GoldMine will search through that table prior to downloading a message to verify that the E-mail Address does, in fact, exist should the user have selected this option. This would leave all messages from unknown contacts on the **Internet Mail Server** until the user has time to determine, through the GoldMine Preview option, that the message is a pertinent message, and that it should, in fact, be downloaded.

The last option in this frame is to ☐ **Send queued messages**. During the creation of an Internet E-mail message, the user has the option to queue the message for later distribution. Should the user select this option, during the **Auto-retrieve** process, GoldMine will attempt to deliver any messages that are currently queued for sending.

All of these options in this frame are only relevant during the Auto-retrieval process, and allow the user more control over their Internet E-mail. With the use of these options, GoldMine allows some automatic options tempered by some manual options. It is the user, in conjunction with their GoldMine Administrator, that must determine how much is to be automatic, and how much is to be manual. The UserID.ini settings that accompany the various settings in this frame are:

```
[Internet]
ActiveAutoGetMail=1
GetInterval=15
MaxEmailSize=1024
SkipLarge=1
SkipNoAddress=1
SendQueueWhenAutoGet=1
```

Note

These options may best be defined on the Corporate level. As a GoldMine Administrator, you may wish to employ a User Override (discussed later in this chapter) as opposed to allowing the users to set these Options willy nilly. This may also position you better for doing your Corporate Backups of GoldMine.

This hierarchal structure can make searching for attachments, outside of the GoldMine environment, much easier.

There is one more setting, and a few more options on the **Retrieval** tab that I must cover. The first is the path for any **Internet E-mail Attachments**. By default, in the old days, GoldMine set the **Attachments directory:** to be under the GoldMine folder. Now a days, GoldMine is trying to follow the Microsoft Windows Standards, and, as such, you can see in figure 3-33, the default path for this user is **C:\ProgramData\GoldMine\MailBox\Attach**. Should the user, the GoldMine Administrator, or the Network Administrator, designate a different location for which you, or the user, should store their e-mail attachments, then this is the field for instructing GoldMine as to that location. In a network environment, many Network Administrators will want these in a subset folder under the network installation of GoldMine for easy backup solutions.

I will now cover the rest of the options as shown in Figure 3-33. These are all checkbox options that allow for the structured saving of attachments as opposed to having all of the attachments saved under a single folder. The first of these options is to ☐ **Organize the attachments in a folder by receiving user**. Choosing this option would cause GoldMine to create a subfolder under the previously defined **Attachments directory:** folder based on the UserID, in my case, DJ. Therefore the default path that GoldMine will use for my attachments, as I have selected this option, would be:

```
C:\ProgramData\GoldMine\MailBox\Attach\DJ
```

Further, the user may opt to have subfolders under their subfolder. Yes, it gets deeper with ☐ **Organize the attachments in a folder by received date year**, and even deeper yet as once this is selected another option becomes enabled. ☐ **Further organize attachments in a folder by received date month**. You may choose both of these options without having chosen the option discussed in the previous paragraph. One could end up with quite the structure attachment hierarchy. Using my example again with these options selected, the path for todays attachments would be:

```
C:\ProgramData\GoldMine\MailBox\Attach\DJ\2009\05
```

The next, and final option tells GoldMine to ☑ **Save attachments as linked documents**, and this option is selected in the default configuration. GoldMine maintains a **Links** tab with linked documents, spreadsheets, attachments etcetera for each contact record. It is a one-to-many relationship created in the ContSupp table, such that each contact record can have many linked records. In the

default configuration, GoldMine will strip the attachment out of an E-mail message, place it in the designated directory, and link it to the contact record associated with the E-mail Address. Future viewing of the attachment can be accomplished from the **Links** tab on the contact record. In effect, GoldMine becomes your **Document Management Center**.

These options might be represented in the UserID.ini as:

```
[Internet]
AttachDir=C:\ProgramData\GoldMine\Mailbox\Attach\
NewFilingMode=1
AddYearToAttachDir=1
AddMonthToAttachDir=1
LinkAttachToCont=1
```

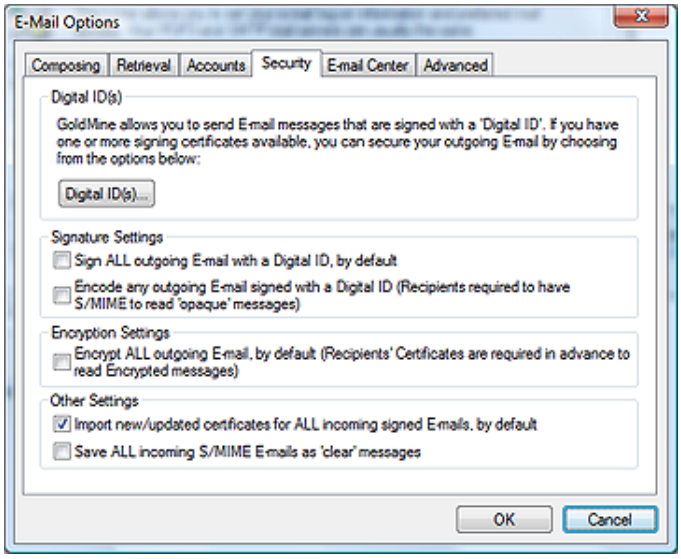


Figure 3-34

I have previously covered the **Accounts** tab, and I will, therefore, head directly to the settings and options covered under the **Security** tab as shown here in Figure 3-34.

This tab was newly added back in GoldMine 6.50.31113 and, as it states on the dialog form, *"GoldMine allows you to send E-mail messages that are signed with a 'Digital ID'. If you have one or more signing certificates available, you can secure your outgoing E-mail by choosing from the options below:"* If you own any Digital ID(s), and you desire to use them in your GoldMine application, follow the steps in the sidebar to prepare the ID for Import into GoldMine.

If you have imported a Digital ID into GoldMine in the first grouping, **Digital ID(s)**, you may want to set some of the other options that are available to you. The next frame of which has two options in it, is the **Signature Settings** frame. Here one may choose to ☐ **Sign ALL outgoing E-mail with a Digital ID, by default**, which does not, by the way, digitally sign an E-mail merge blast. Additionally, there is the option to ☐ **Encode any outgoing E-mail signed with a Digital ID (Recipients required to have S/MIME to read 'opaque' messages)**. This option should be self explanatory.

The next frame, **Encryption Settings**, has but a single option which is to ☐ **Encrypt ALL outgoing E-mail, by default (Recipients' Certificates are required in advance to read Encrypted messages)**. Again, I feel that the descriptor is very clear, and that no further explanation is required.

The last frame, **Other Settings**, allows the user to ☑ **Import new/updated certificates for ALL incoming signed E-mails, by default**, and is by default selected. With the usage of Digital IDs proliferating, one would probably want to maintain this setting in its default state. These are, however, user Options as always, so they are allowed to change these at will unless you impose a User Override (discussed later in this chapter). The last option is not selected in the default state, and allows the user to opt to have any encoded and digitally signed messages to be decoded and saved in a clear state. The ☐ **Save ALL incoming S/MIME E-mails as 'clear' messages** option allows the user to select this preference. One would probably want to select this option for received messages in GoldMine that are digitally encrypted.

With everything selected, the UserID.ini settings could look like:

```
[Internet]
DefaultSignSMIME=1
SMIMEUserOpaqueSign=1
DefaultEncryptSMIME=1
SMIMEAutoImpCert=1
SMIMESaveDecrypt=1
```

This allows us to proceed to the **E-mail Center** tab, Figure 3-35 on the next page. There are five separate frames contained on this tab, although three of the frames only consist of a single radio button option setting, as well there is a free floating option and an option button.

Steps

Prepare Digital ID for Import

1. *Open **Internet Options** via the **Control Panel***
2. *Click on the **Content** tab*
3. *Click on the **Certificates** button*
4. *Highlight the certificate that you wish to **Export***
5. *Click on the **Export** button, and follow the Wizard instructions, but making certain to save the export as a **.pfx** file*

Import Digital ID into GoldMine

1. *Click on the **Options** button from the Toolbar*
2. *Click on the **E-mail** tab*
3. *Click on the M**ore Options...** button*
4. *Click on the **Security** tab*
5. *Click on the **Digital ID(s)...** button*
6. *Click on the **Import** button*
7. *Find your **.pfx** file*
8. *Enter and confirm **Password:** if you have one established*
9. *Click on the **OK** button*

Note

*I need to make a statement here, I have no clue as to the value of **Digital ID(s)**. I did purchase one for testing with my GoldMine installation, and for the writing of this book, however, other than adding some extra steps to my e-mail process, I can not say that I have been able to see any added value to having, and using, this option. Quite the contrary, in fact, many recepients didn't know what to do with the digitally signed e-mails that I was sending to them.*

Recommendation

*I have found that the optimal solution is to not check ☐ **Show both E-mail Address and Account Name (if available) for Online accounts**, and to make sure that the users assign all accounts a colloquial account name that is meaningful to them.*

Note

*Quit franky, I would prefer the use of the ☑ **Show Outlook Folder** in the Mail taskbar option to that of using **GISMO**.*

Note

*Remember that I discussed, in a previous chapter, that the GoldMine Administrator may set the initial user Options for a network user, as they are setting up that user rights. The ☐ **Empty trash when closing E-mail Center** option is one option that the GoldMine Administrator may want to preset for the user, if they have not already set up a User Override to this.*

The first frame is the **General Settings** frame. There are two checkbox options within this frame, and both are selected in the default state. The first option, ☑ **Show both E-mail Address and Account Name (if available) for Online accounts**, may prove to be useful. Without this selected, GoldMine will insert the account name only in the **Online** tree, which is now located in the **Mail** TaskBar to the left in GoldMine Premium, if one is available, and if not available, GoldMine will insert the E-mail Address into the **Online** tree. With this option selected, both will be displayed.

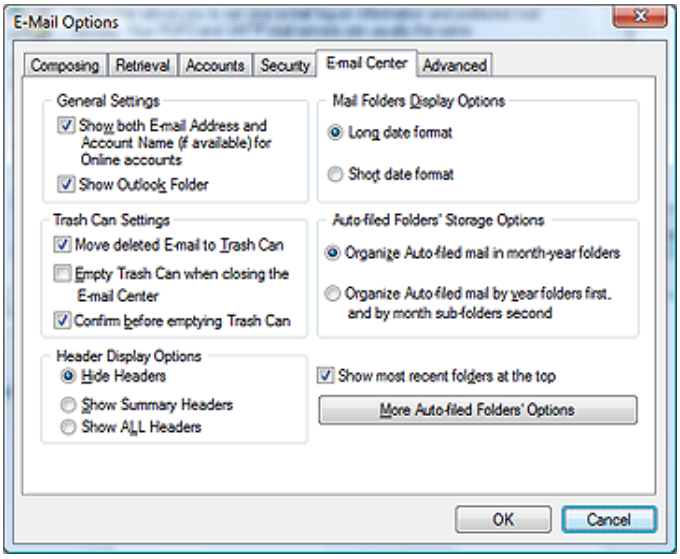


Figure 3-35

The next option in this frame is to ☑ **Show Outlook Folder** in the **Mail** TaskBar. I make no recommendation on this option. It can be a blessing as well as a curse. A bonus with GoldMine Premium is that on older versions of Outlook, one had to acknowledge that Outlook could be accessed for x amount of minutes each time Outlook was selected from the **Mail** TaskBar. With GoldMine Premium and Outlook 2007 this is no longer the case. Enabling this option will allow the user to Sync to/from Outlook, Copy to GoldMine, and Copy to Outlook by dragging from the one to the other, as well as being able to Zoom Outlook E-mail messages. If you are utilizing Outlook Business Contact Manager, these folders too will be displayed for the user in their **Mail** TaskBar.

Having said that, these two options could register in the UserID.ini as:

```
[Internet]
ShowFullAccountName=0
ShowOutlookInIMC=0
```

The next frame covers the **Trash Can Settings** options that are available for the user. The first option, of which, is to ☑ **Move deleted E-mail to Trash Can** which is selected by default. This presents a double safety for the user. When the user deletes e-mail, it is placed into the trash can. The user must then empty the trash can to completely remove the mail from their GoldMine. Even at that, GoldMine will present the user with the standard *"Are you sure"* message box before GoldMine allows for the emptying of the **Deleted** folder located in the **Mail** TaskBar. This option functions exactly the same, when selected, as the Trash Can which is located on the users Windows operating system desktop.

Caveat: You are in a SQL environment, and when a record is deleted in SQL, it is gone. You would most likely want to have your users employ this safety net option.

In conjunction with the last option, the user may also choose to ☐ **Empty Trash Can when closing the E-mail Center**. This option, when selected, causes GoldMine to prompt the user to empty the trash can as they close the **E-mail Center** if, and only if, the next option, ☑ **Confirm before emptying Trash Can** is also selected. Otherwise, when closing the E-mail Center, and this option is selected, GoldMine will just empty the trash can without a user warning. Yes this is cleaner, and more automatic, and recommended if you also select the next option. They may answer no to the question, and the trash can will not be emptied, but the important item here is that the question will have been asked. The user will have had to make a conscious decision to empty or to not empty the trash can. Once asked, the user must respond. A GoldMine Administrator may want their users, especially their users that do not concern themselves with standard file clean up procedures, to set this option forcing the thought upon the user. I would like to add that this is almost a moot option in GoldMine Premium as most people will leave the **E-mail Center** tab open if using the tabbed display, as will those that are using the Windowed arranged display.

The last option, in this frame, is selected by default, and forces GoldMine to ☑ **Confirm before emptying Trash Can**. This option goes hand-in-hand with the first two options, and is the redundant message that we had discussed. Should the user deselect this option, then they would be removing one of the safety layers that are available in the GoldMine **E-mail Center**. Accepting this option as is, will cause GoldMine to present a warning prompt, forcing the user to answer the **Yes** or **No** question when attempting to empty the trash can.

The setting and unsetting of these options could produce a resulting UserID.ini that might contain:

```
[Internet]
UseTrashCan=1
EmptyTrashOnExit=1
ConfirmEmptyTrash=1
```

If, in the UserID.ini, there was a setting of **UseTrashCan = 0** then the other two settings might not be displayed in the UserID.ini. Additionally again, for default values, GoldMine accepts the absence of a statement in the UserID.ini to represent the default setting, however, if someone were to enter by hand, **UseTrashCan = 1**, into the UserID.ini, then GoldMine would accept that value properly.

Note

*You may always choose to ◉ **Hide Headers,** and the User will always have the option to Right-Click over the **Preview** area and select one of the other Header display options on the fly.*

In the next frame, **Header Display Options**, there is but one radio button option choice available. The user may choose to ◉ **Hide Headers** information of an e-mail message, or the user may choose to just ○ **Show Summary Headers** information. With the last choice being to ○ **Show ALL Headers**. As these are a radio button selection option, the user may only select one of the three choices even though it visually appears to be two individual groupings. The summary information may include information such as the date, the sender, the subject as well as other information, but does not show any routing information that may be contained in the header. Usually all of the needed information is displayed in the **Online** folder of the **Mail** TaskBar, and in the **Preview** window. To include the summary, or all header information in the Preview window, could be considered redundant.

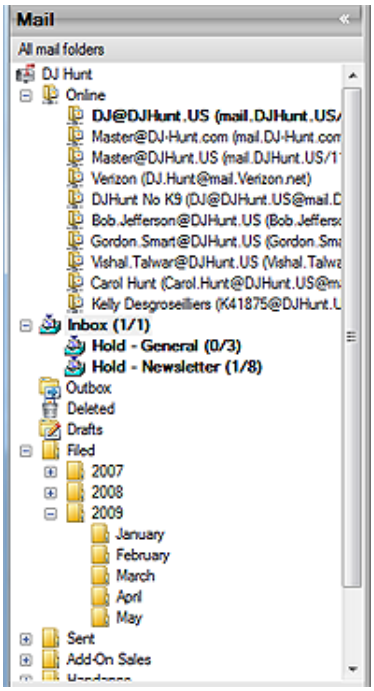
If the user had selected to show only summary header information, then the UserID.ini information could be:

```
[Internet]
ShowHeaders=1
```

In the next frame, we can see that, here as well, there is but one option, and again, it is a radio button option. This frame is the **Mail Folder Display Options** frame, and it is the option in this frame that allows the user to set the format for displaying the dates in the E-mail Center. Accepting the default ◉ **Long date format** will cause the dates to be displayed as Wednesday, July 4, 2007 5:01 PM, while selecting ○ **Short date format** will cause the same date to be displayed as 7/4/2007 5:01 PM.

The result of selecting to use the short date format should appear in the UserID.ini as:

```
[Internet]
UseShortDate=1
```



Which brings up the last frame on the E-mail Center tab, the **Auto-filed Folders' Storage Options** frame. In this frame there is, again, but one selection from the two offered. The default selection is ◉ **Organize Auto-filed mail in month-year folders** while the other option is to ○ **Organize Auto-filed mail by year folders first, and by month sub-folders second** (this second option selection is displayed for you here in Figure 3-36 as this is the way that I set my Options).

Both options are pretty much self explanatory. However, outside of this frame is a button that may have some relevance as to your choice here. The button is **More Auto-filed Folders' Options**, however, I'm getting ahead of myself. For some unknown reason, there is an option that affects the **Auto-filed Folders' Storage Options**, yet it is not included within this frame. This new option to GoldMine Premium 8.5.1 is to ☑ **Show most recent folders at the top**. Some users may wish to arrange their folders in the manner. Personally, I do not, hence, my folders are as shown in Figure 3-36.

Now let's return to that button. One would think that the button belonged within the afore mentioned frame as well, wouldn't they? And again, for that same unexplained logic, it is not. In Figure 3-37, on the next page, you can see the resulting dialog form produced by the clicking of this button.

Figure 3-36

One may choose to override the default month names for folders. To do so, they must be on this dialog form, and they must first select ☐ **Override the default month names** to enable the name fields for the user to be able to enter the overriding names.

These are the steps that I used to test these settings:

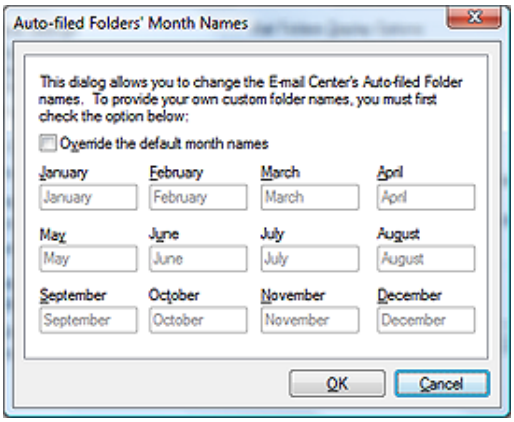


Figure 3-37

Step 1: I first left the default setting, and fast filed an e-mail.

Step 2: I then set the option to use year, and sub-folder month.

Step 3: I closed GoldMine.

Step 4: I restarted GoldMine, and then I fast filed another e-mail.

Step 5: I then overrode the month settings, and changed the month of December to Winter.

Step 6: I then closed GoldMine.

Step 7: I restarted GoldMine, and then I fast filed another e-mail.

Tip

*Should the tree in the **Mail** taskbar, Figure 3-36, get a different set of folders (new) when the user changes their **Options**, they may move their messages from one folder to another until the unwanted folder is empty. At that point the user may simply right-click on the unwanted folder, and select **Delete Folder** from the local popup menu. GoldMine will not automatically transfer the messages from one style folder setup to a different style folder setup.*

Note

*The line wrap here in the **[Internet]** section of my ini file is only for presentation purposes in this book, and is actually one continuous line of code.*

Why did I do all of this? I did this to see the consequences of these actions upon the **Mail** TaskBar. Yes, the user can make these adjustments, but all previous settings are maintained in the **Mail** TaskBar forever, unless the user does some finagling in the **Mail** TaskBar itself. All of the messages were fast filed on the same day. In the tree under the **Filed** folder, was the folder, December 2009 which was the result of maintaining the default setting. Under the Filed folder on the tree again, I saw a folder 2009 with a sub-folder of December. This was the result of my having selected the second option. Finally, maintaining the second option, but overriding the December name, I saw yet another sub-folder under the 2009 folder called Winter. That's a mess of folders for the same period.

As the messages were saved in the folders as they were named at the time the message was Filed, all of the folders and their E-mails are maintained in the tree forever unless the tree and its contents are manipulated by hand (see **Tip** in sidebar).

Leaving the options as last set in my test, should add the following lines to a UserID.ini:

```
[Internet]
NewFilingMode=1
MonthlyFolderNames=January*February*March*April*May*June*
                   July*August*September*October*November*Winter*???*
```

The last tab of the **E-Mail Options**, is the **Advanced** tab, and is shown here in Figure 3-38. This tab is becoming more and more crowded with each new release of GoldMine. I suspect, in future releases, that FrontRange will need to change their approach and/or add additional tabs. The reader will notice that there are four separate option frames, and one orphaned setting at the bottom of the tab.

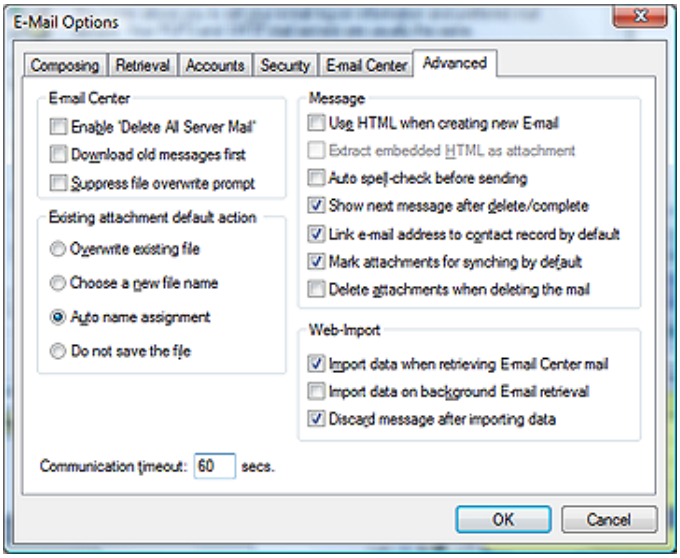


Figure 3-38

We may as well dig right in. In the first frame, we, again, have options that are pertinent to the **E-mail Center**. I won't even speculate why these options are on this tab as opposed to the **E-mail Center** tab, but they are here just the same, hence, we must deal with them here. In the default configuration, none of the options in this frame are selected. It is my opinion these settings should be controlled via a User Override.

WARNING

If, as an Administrator, you are using the server as a backup for e-mails, letting the user delete all server mail could be dangerous. As this is a user defined option, you will need to set policy in this matter, and regularly check that they are adhering to the policy. I would suggest a User Override.

Tip

The users will not know which attachment belongs to whom. It is, therefore, important that they have selected ☑ ***Save attachments as linked document****, see Figure 3-33, and that they use GoldMine as their* ***Document Management Center****.*

However, users or corporations may now choose to have each users attachments filed under separate folders. Hence this tip, although still valid, loses some of its significance.

Note

I only mention this here as an example. In fact, in my UserID.ini I have opted to ◉ ***Overwrite existing file****.*

I do this because I have a system (don't we all). Whenever an attachment is received, I store a copy of it in a client folder that I create for all of my clients. It is, therefore, only important to have a copy of the last received Lookup.ini, for example, in my ***Attach*** *folder under GoldMine.*

Note

The user must have the latest version of Microsoft Internet Explorer on their system. The GoldMine product is married to Microsoft Internet Explorer for many of its components. One major component is fonts in GoldMine are dictated by the fonts in Intenet Explorer. There is no alternative option for something such as FireFox for instance.

Your first option, in the **E-mail Center** frame, is to ☐ **Enable 'Delete All Server Mail'**. If the user selects this option, they are causing GoldMine to show an additional list in the local menu listing. This item will permit the user to delete all of the E-mail on the Internet Mail Server with the click of one button. Naturally, because of the potential danger, GoldMine will present the user with an **Are you sure** type of message.

Selecting the next option in this frame will instruct GoldMine to ☐ **Download old messages first** from the Internet Mail Server. Selecting this option really has no noticeable effect to the user, as the user E-mail is always sorted Newest to Oldest on the **E-mail Center** dialog form, at least as of this writing. There has been some suggestions put forth to have this as a user definable option.

Lastly, in the **E-mail Center** frame, the user has the ability to ☐ **Suppress file overwrite prompt**. In the next frame, the E**xisting attachment default action** frame, I will be discussing the options that the user is offered when the prompt is displayed. The user may choose here to not display the prompt at all, and GoldMine will not warn the user about duplicate attachment file names. GoldMine will simply follow the instructions set by the user in the **Existing attachment default action** frame.

The **E-mail Center** frame options under the **Advanced** tab could result in settings such as these in the UserID.ini:

```
[Internet]
AllowDeleteAll=1
GetOldToNew=1
SkipOverWriteUI=1
```

This next frame, the **Existing attachment default action** frame, has but one selection option as this is again a radio button selection. The user may choose to have the user overwrite prompt default to one of four possible choices. The user may choose to default the prompt to ○ **Overwrite existing file**, or to default to ○ **Choose a new file name**. The user may choose to accept the default setting for this frame which is to ◉ **Auto name assignment**, or, lastly, the user may choose to default the prompt to ○ **Do not save the file**.

Many times, users will receive attachments having the same name as one that already exists. In my case, I received hundreds of Lookup.ini files to review. Obviously, I hope, each one is important. I would not want to default my option to overwrite the existing file. I might opt for the second choice of choosing a new file name, however, that requires additional work. It would be much simpler, just to accept the default, and to let GoldMine do the ◉ **Auto name assignment**. With this setting, GoldMine will append the next consecutive number to a file name until it is unique or the number has reached 64 at which point GoldMine will attempt to generate a new name entirely for this particular file. Some of my Lookup.ini file names could look like Lookup(1).ini, Lookup(2).ini, Lookup(3).ini, etcetera. The user will be able to see these names in the folder that they chose for their attachments, which, as you'll remember, in the default configuration, was ...\GoldMine\MailBox\Attach.

Because this UserID.ini setting does not follow any standard convention, I will show you all of the possible permutations, however, only one entry is possible:

	[Internet]
○ **Overwrite existing file**	**RetrieveOverwrite=6**
○ **Choose a new file name**	**RetrieveOverwrite=7**
◉ **Auto name assignment**	**RetrieveOverwrite=4**
○ **Do not save the file**	**RetrieveOverwrite=2**

Let's move on to that next frame then. This frame is the **Message** frame, and permits the user some options directly affecting their messages. The first option in this section, for instance, tells GoldMine to ☐ **Use HTML when creating new E-mail**, which, surprisingly, is not checked in the default state. Well, as far as I can tell, although this is an option, in GoldMine Premium selecting or deselecting this option has little effect. GoldMine Premium honors the setting of the E-mail Address **Rich text (HTML)**, and, if an HTML e-mail is received, GoldMine will receive it in HTML format. This is a big change over previous versions of GoldMine. FrontRange is constantly revamping, and enhancing its e-mail capabilities. Quite frankly, in todays Internet, I would always, and do always select this option.

This next option, ☐ **Extract embedded HTML as attachment**, is not even available for selection. It is disabled. Again, this is a legacy setting that they just didn't bother removing from the GUI.

The next option is really self explanatory, however, this book requires that I cover each item. ☐ **Auto spell-check before sending**, if selected, will automatically check the body of the e-mail message for spelling errors using the built in GoldMine dictionary as it is preparing to send the message. My spelling is horrendous so I always have this option selected.

The ☑ **Show next message after delete/complete** option is a power user option, and is selected in the default configuration state. Once the user has finished with the message they are reading, and

WARNING

Users Do Not Read Warnings

*With this option selected, if the E-mail Address already exists within GoldMine, GoldMine will tell the user that the E-mail Address is linked to another record. GoldMine will ask if they want to move the E-mail Address to the current record. Trust me. The user will just click **OK** without reading the message. You will end up with many mislinked E-mail Addresses in your GoldMine database. You really, really, really want to consider employing a User Override here to make certain that the ☑ **Link e-mail address to contact record by default** option is **not** selected.*

delete or complete it, GoldMine will automatically present, in the e-mail reader, the next sequentially listed message contained in the **E-mail Center Inbox** folder. Personally, I do not like this feature, and I have deselected this option for myself. You have to love that these are User Options.

☑ **Link e-mail address to contact record by default** is also selected in the default configuration state. If selected, GoldMine will attempt to link the E-mail Address, from the retrieved message, to the contact record to which the message has been linked. If the user wishes to link a message to a contact record, and to not have the accompanying E-mail Address linked as well, then they should remove the check from this option. I can't think of when or why a user would not want to link an E-mail Address to a contact record, however, this is a user option for messages. I can only assume that there were enough requests from end users for FrontRange to have included this as an option within the GoldMine user Options.

☑ **Mark attachments for syncing by default** is another user Option that is selected in the default configuration state. In a synchronization environment this might be a good option for selection. With this option selected, all linked incoming (this is an important distinction for you to remember) E-mail attachments will be marked for synchronization. The GoldMine Help file states, *"...except for VCards and transfer sets."*, however, these items are not usually linked to a contact record anyway. If, after receiving the message, the user decides against synchronizing the attachment, the user may go into the attachment, under the Links tab of the contact record, and deselect the option ☑ **Allow File to Synchronize**. If the user, or organization of users, receives an abundance of attachments, and they are all selected for synchronization, this could cause an extremely long synchronization time. This would be much more noticeable if the user happens to be synchronizing via a modem connection (Does anyone still use dial-up?). I can guarantee that, in this situation, it won't take the user long to decide to remove the check from this option.

And the final option for the **Message** frame is to ☐ **Delete attachments when deleting the mail**. This is not selected in the default configuration state of GoldMine. I have seen, too often, many orphaned attachments when this option is not selected. Hard drives, even with the volumes they can handle today, can easily and unknowingly get completely filled up with attachments. If the user is deleting the E-mail message, then they are probably also through with the attachments as well. The users should decide, together with their Network and/or their GoldMine Administrator, whether this option should be selected or not. I have this option selected for my team. I have trained my users to save a copy of any attachment, through the E-mail reader, that they need to have saved, when they plan on deleting the E-mail message.

Well, that was a rather large option frame, seven items in all. Albeit, two that were irrelevant. I would like to reiterate to make some of these UserID.ini settings available for display here, I had to reverse their default setting. Again, I emphasize, not all settings are simply a 0 or a 1. Some settings are not contained in the UserID.ini unless they are in their non default state.

Here are the various settings that might appear in the UserID.ini for the **Message** frame:

```
[Internet]
UseHTMLByDefault=1
ExtractEmbeddedHTML=1 ( No longer entered thru GUI )
AutoSpell=1
SkipOnDispose=0
DefaultLinkAddr=0
SyncAttachmentDefault=0
DelAttachWithMsg=1
```

Note

*With todays version of WebImport, you may have the marker, **{$GM-WEBIMPORT$}**, anywhere in the E-mail message. This is because you must set a **Rule** in your GoldMine that will designate that any e-mail with this marker as a WebImport message, and should be processed accordingly.*

Our fourth and final frame on the **Advanced** tab is the **Web-Import** frame which consists of three user options. A WebImport file is a specially constructed E-mail message. This message will usually be constructed by a perl, php, or asp script on a website, and the E-mail is then sent to GoldMine with special header information: **{$GM-WEBIMPORT$}**. This special **To:** information identifies this message as a WebImport message which is to be handled differently by the GoldMine E-mail Center. In this frame the user is instructing GoldMine as to what should happen with regards to any WebImport message. In the default configuration, the user option is set to ☑ **Import data when retrieving E-mail Center mail**. This causes GoldMine to import data at the same time as it is retrieving any E-mail messages from the Internet Mail Server. In an ideal environment, the GoldMine Administrator would not have WebImport E-mail directed to an individual user, but instead, would direct this E-mail to someone who is tasked with this job function. The GoldMine Administrator may ask most users to turn this option off.

Note

Background E-mail retrieval may also be induced through the commandline use of the Server Agent. This silent mode usage would be set into motion with the use of a commandline similar to:

. . . \ G o l d M i n e \ G M W . e x e /u:UserName /p:Password /s:DDE

The next option in this frame pertains to unattended E-mail retrieval. Should GoldMine ☐ **Import data on background E-mail retrieval**? Background e-mail retrieval is better known to users as Auto-Retrieval, and, as you can see, this option is not selected. If this user were the designated user for WebImporting, then the user may wish to have this option selected, so that anytime their Internet mail server is checked for E-mail, the WebImport E-mail will be processed as well.

Note

*Having said that, you should be aware that the WebImport instruction set could include a **Save** statement which is independant of this switch. In fact, I save all WebImports to the ContHist table as a backup to the updated/new information incorporated as a WebImport.*

The last option in the **Web-Import** frame, ☑ **Discard message after importing data**, is also selected in the default configuration state. There is not really any need to keep the message once a record has been created from the e-mail message, except during the initial testing phase of your WebImport process. The information contained in the message becomes redundant information (see sidebar Note), and clutters one of GoldMines fastest growing tables, the **Mailbox** table. The user should discuss any desire to change this option with their GoldMine Administrator prior to making the change.

These three options could show up in the UserID.ini as:

```
[Internet]
AutoWebImport=0
BackgroundWebImp=1
DiscardWebImportMessages=0
```

Not in any frame, but still on the **Advanced** tab, is the setting for **Communication timeout: xxx secs.**, where in the default configuration, the xx is actually **60** seconds. On forced retrieval or Auto-Retrieval, GoldMine will attempt to connect to the Internet Mail Server. If it can not connect within the allocated time, GoldMine will break off its attempt, and usually issue a Connection Failure error message. On slow connections, one might need to bump this setting up. I have seen that setting this to 120 has helped in some client situations. Personally, I have mine set to 1440 seconds.

This setting would appear in the UserID.ini as:

```
[Internet]
TCPTimeout=60
```

Wow, that was one long section, wasn't it? On all of these last few pages, I have only been discussing the **E-Mail** tab, and its many subtabs. I thought that this would be a long section, but I never figured it would turn out to be this long. Well, we have now concluded with the **E-Mail** tab, and all of its options. It is time to move on to the next tab, the **Telephony** tab.

Telephony

Note

*Modem settings, under this tab, are employed mainly when using GoldMine to dial the active Contact record. From the GoldMine menu that would be: **Action** | **Call Contact** ► | **Dial***

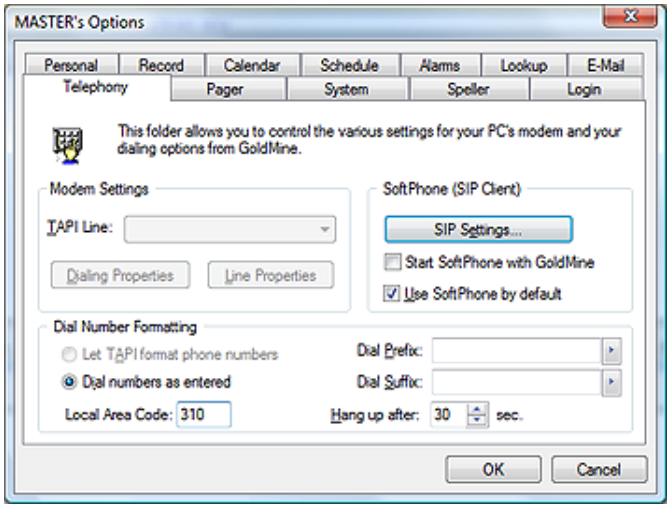


Figure 3-39

The tab, shown here in Figure 3-39, is the **Telephony** tab, and it is this tab that allows the user to control the choice of which PC modem to employ should the user have more than one set up. As you are aware, default modem and dialing properties are set up in the **Phone and Modem Options** under the **Windows Control Panel**. GoldMine also allows the user some additional control over the default settings that GoldMine will employ only in its use of the chosen modem.

The first of the three frames that I will discuss is the **Modem Settings** frame. The user is expected to select a **TAPI Line:** from the drop-down list of their systems pre setup modems. If the user only has one modem available on their system, this modem will already be selected in this field for this user.

I will not be discussing the **Dialing Properties** button or the **Line Properties** button in this book as both are pointers to the Windows options for the selected modem. The user should have no need to enter into either of these areas except for one, and only one reason. If you will look at Figure 3-39 in the **Dial Number Formatting** frame, you will see one field that contains information. This is the **Local Area Code:** setting. Unlike past versions of GoldMine, this information can now be modified directing within the GoldMine Telephony dialog form. This field is read directly from the dialing properties of within Windows. Any changes to **Local Area Code:** setting should be made through the users Windows environment, however, it can now be overridden via the UserID.ini. After any change has been made in the next frame, however, some of the options from this frame will be written to the UserID.ini.

```
[Modem]
DeviceID=0
AreaCode=978
```

Note

*In order for the TAPI option to work properly when using GoldMine to dial an international number, the GoldMine **Edit | Record Properties ► | Record-related Settings..., Phone Formatting**, must be set to ◉ **Non-USA Format** for that particular contact record. GoldMine.*

Note

*Windows uses the **Telephone Application Programming Interface** (**TAPI**) to set up modems.*

I should now finish off by discussing the rest of the **Dial Number Formatting** frame options. The first option is a radio button selection option. The user has the choice to ◉ **Let TAPI format phone numbers** or to ○ **Dial numbers as entered**. The default selection is to let TAPI format the phone numbers. Letting TAPI control the formatting of numbers means that, should the **Country:** field of the GoldMine contact record contain a Windows recognized country, then TAPI will automatically supply the appropriate access and country codes when GoldMine is dialing the number stored in the **Phone1:** field of the contact record. Let's say that the **Phone1:** field contains **03 95659780** and the **Country:** field contains **Australia** on a particular contact record. When dialing this number through GoldMine, and under the TAPI rules, the international access code of **011** would be supplied as well as the country code of **61**.

The alternative selection here is to ○ **Dial numbers as entered** which, believe it or not, lets GoldMine dial the number as entered. However, the selection of this option will also cause GoldMine to adhere to any of its own rules including prefix or suffix entry as well as any settings that may have been instituted in the **PreDial.ini**. I will not be discussing the **PreDial.ini** in this book, however, I would suggest that you, the GoldMine Administrator, look at: **Technical Document 387**, **Using and Setting up GoldMine's for Special Dialing Needs** at http://Support.FrontRange.com/Support/GoldMine/387_PredialINI.htm.

I've already discussed the fact that the user can not change the system **Local Area Code:** field from within this frame in GoldMine, so let's move on to the **Dial Prefix:** field. The prefix is a series of numbers and characters that must be dialed before dialing the actual telephone number. Some prefixes that come to mind are 9 to access an outside line, a comma (,) to enter a 2 second pause, or *70 to disable call waiting. Whatever string the users particular circumstances dictate, this is the area to enter the prefix information.

In that same venue, we have the **Dial Suffix:** field. Here the user would enter a number sequence that executes special commands, and must be dialed by the modem after the telephone number has been dialed. In some offices this might be the extension number of the telephone from which the number is being dialed. This occurs for accounting purposes, for example. Alternatively, the reversing of the previously mentioned *70 command, to disable call waiting, would be *71, to enable call waiting.

Lastly we have the setting which instructs GoldMine to **Hang up after: xx sec.** which is set in the default configuration to **30** seconds. Once GoldMine attempts to make a connection, if the connection is not made within this allocated time frame, GoldMine will hang up the modem, freeing the telephone line for other usage. FrontRange has determined that 30 seconds is the optimal time for most users, however, the user is free to raise or lower this number as they deem adequate for their particular usage.

The remainder of the possible UserID.ini settings for this section are shown here:

```
[Modem]
TAPITranslation=1
ModemPrefix=*70,, 9,,,
ModemSuffix=*71
HangupTime=30
```

Note

*I am only discussing the **SoftPhone** as it is part of the **Options**. As I do not have, nor use VoIP, I have not had the capabilities of testing this feature in GoldMine Premium.*

The **Telephony** tab used to bear the name of **Modem** as its tab name. This was changed back in GoldMine 6.7. In addition to this change, a new frame was added to the tab, the **SoftPhone (SIP Client)** frame. This frame allows you to use, and to configure a VoIP (Voice Over IP) system that you may have in place (in theory). I don't have this feature enabled on my telephone system, hence, I am not able to test this out for you. I can only show you the ini settings derived by making changes in this frame.

The first option in this frame, see Figure 3-39, is the **SIP Settings** button. Clicking on this button brings up the dialog form shown here in Figure 3-40. I have taken the liberty of filling in this form with information so that I could show you the result stored in the UserID.ini. These values are meaningless, and are only here as reference markers.

You'll also notice, in Figure 3-40, that I have entered a Password, and, appropriately it is hidden

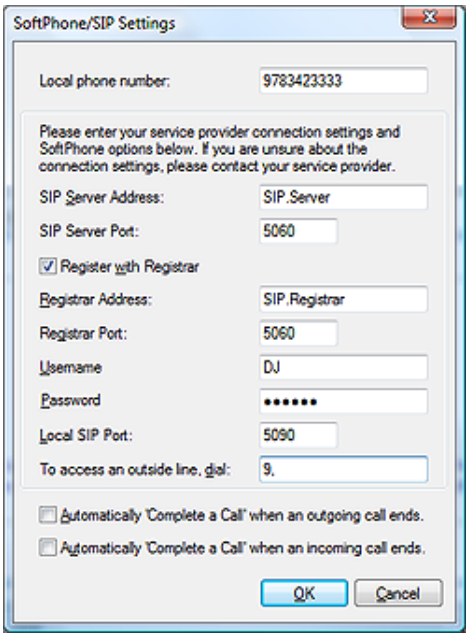


Figure 3-40

in the dialog form. However, the same does not hold true for the UserID.ini. Review the **[SoftPhone]** section of the UserID.ini displayed below, and you will notice the statement:

```
Password=waldo
```

This looks suspiciously like clear text to me. Whoops! We have a Security breach.

Back to Figure 3-39, you notice two more options that could be utilized if you are using VoIP with your GoldMine, the first option is to ☐ **Start SoftPhone with GoldMine**, while the other is to ☑ **Use SoftPhone by default**. I would believe that both of these options are self explanatory.

Not that these values represent anything that is accurate, but to show how these settings are reflected in the UserID.ini:

```
[SoftPhone]
Extension=9783423333
PrimaryRegistrarName=SIP.Registrar
PrimaryProxyName=SIP.Server
ContactDialingPrefix=9,
Username=DJ
Password=waldo
RecordingdDir=
VoiceOutDevice=
SysTonesDevice=
VoiceInDevice=
ProxyDomain=
PrimaryRegistrarPort=5060
PrimaryProxyPort=5060
SipPort=5090
TypeOfService=0
RecordingBuffer=0
Register=1
CreateHistOut=1
CreateHistIn=1
BypassNAT=0
AutoBind=1
```

Pager

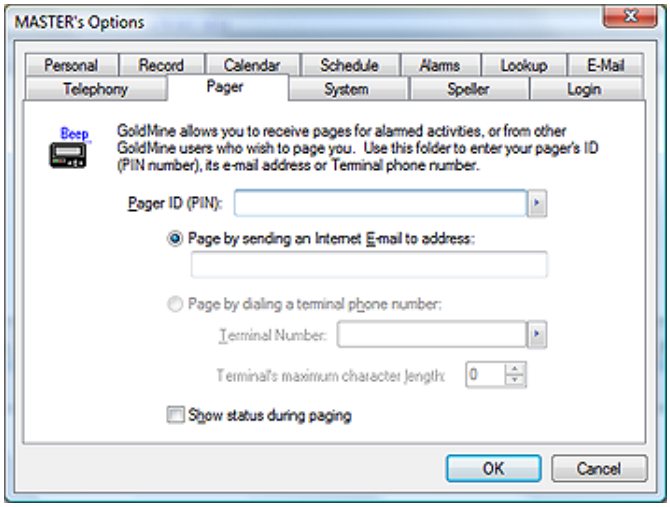


Figure 3-41

Well, that was rather a short, and relatively painless tab to cover. The next tab, the **Pager** tab, is even shorter. Pager? Does anyone even use one of those any more? As one can see in Figure 3-41, there are only really two items that the user needs to concern themselves about. The reader should remember, when I covered the **Alarms** tab, Figure 3-23, there was an option to ☐ **Page me with the alarm when not acknowledged within: 10 minutes**. If the user has selected this option, or if the user wishes to allow another GoldMine user to page them, then they must complete the information contained on the **Pager** tab.

The first item is the **Pager ID (PIN):** field into which the user should enter their pagers PIN. Should the user not know this information, they may need to contact their Pager Service Provider for the required PIN information.

Once the pager ID information has been entered, the user has to select one of two distribution methods. The first method, which, in GoldMine Premium, is the default selection, is ◉ **Page by sending an Internet E-mail to address:**. If this is the users choice, then they must enter the Internet E-mail Address to which they wish to have the page sent. In GoldMine Premium, the second option appears to always be disabled (see Sidebar Note).

On the other hand, if available, one may select ○ **Page by dialing a terminal phone number:**. When the user selects to dial a terminal phone number, they must include the **Terminal Number:**, and then there is one piece of additional information the user must supply for GoldMine, the **Ter-**

Note

Although the second option is disabled via the GUI, I believe that you may still enter the statements manually via the UserID.ini.

In order to enable this option, you may have to have a Modem connected and configured in your operating system. I certainly don't so I can't say for certain.

minal's maximum character length: xx which is set to 0 in the default configuration. If the user doesn't change this number, then the user will not receive any messages. Most pagers will accept 80 to 100 characters of information. The user should enter the greatest number of characters that their pager can accept at one time.

There is one more option that we must talk about in this build of GoldMine, and that is whether to ☐ **Show status during paging** or not. Naturally, if selected, this would be displayed in the Process Monitor within GoldMine.

There is only one possible UserID.ini set of settings that could be generated based on the information contained on the **Pager** tab. This set might look like:

```
[GoldPager]
PIN=012345678
PagerEmail=DJ@DJHunt.US
MaxChars=0
ShowStatus=1
```

Notice that the MaxChar statement is added to the UserID.ini even though it will not be employed with this setting. While the manually entered **Terminal Number:** might look like:

```
[GoldPager]
PIN=012345678
Terminal=9,,19783423434,,,6
MaxChars=100
ShowStatus=1
```

I would mention here, in the older versions of GoldMine, the next tab would have been the **Sync** tab. In point of fact, I had originally covered the **Sync** tab here in our first draft of this chapter. As FrontRange has chosen to remove these UserID.ini setting from this GUI in GoldMine 6 and later, I too have decided to remove them from this chapter. They are, however, covered in the **GoldSync** chapter later in this book.

System

We're almost to the end of the user Options' tabs. Only three more left to cover if the user has Master Rights, and only two more for those users who do not possess Master Rights. The next tab that I will cover, Figure 3-42, is the **System** tab (prior to GoldMine Premium, this was known as the **Misc** tab), and there are four frames on this tab, the **Navigation** frame, the **Date and Time** frame, the **Classic toolbar** frame and the **Help** frame. There is also one free floating option that I will discuss shortly.

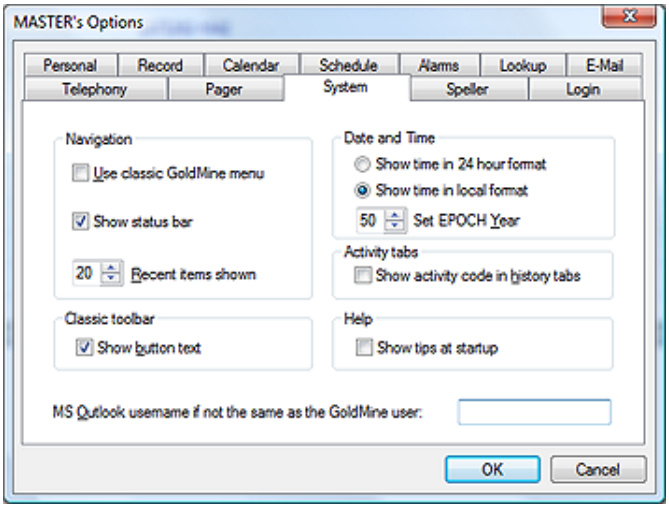


Figure 3-42

Let's first begin with the **Navigation** frame which contains two checkbox control options, and one spinner control option. The first of these is to ☐ **Use classic GoldMine menu**, and I do not recommend that you select this option. Yes your users will have a learning curve to overcome with the new, and supposedly more "User Friendly" interface, but if you don't maintain the status quo of GoldMine Premium then your users will never conquer that learning curve. Alas, they will remain in the GoldMine of their youth. I strongly recommend that you, as the GoldMine Administrator, utilize a User Override which I will discuss later in this chapter.

The second option is to ☑ **Show status bar**, and it works in GoldMine Premium 8.5, sort of. Okay, in previous versions of GoldMine the option was called ☑ **Show Taskbar,** and didn't function. In this version of GoldMine Premium, if this option is selected, then you may change the setting as you wish, and the changes will be apparent immediately. On the other hand, if you are in GoldMine without this option selected, and you decide to change the option to show the status bar, then you will have to exit GoldMine and re-enter GoldMine before the screen refresh will occur. All in all, why would anyone not want the information display in the status bar?

The first option in the **Date and Time** frame is to O **Show time in 24 hour format**, and I do believe that this is another of those self-explanatory options but... Time is displayed within GoldMine at var-

ious locations, one of which is the Status Bar at the bottom right of the main GoldMine screen. The 24 hour format is more commonly known as military time. In the default configuration, GoldMine will display all times as 9:00am or 9:00pm. These two times would translate into 09:00 and 21:00, respectively, in the 24 hour format (and represents how time is stored in the GoldMine tables as GoldMine has not yet made use of the SQL DateTime field types). Changing this option would, in no way, affect the way that time is stored in the tables. Its selection, or not, only affects the manner in which time is displayed within the GoldMine display environment.

The next option that the user may set is to ◉ **Show time in local format**. Do you remember when I discussed the **User-Defined Date** field formatting earlier under the Records tab? Choosing this option does not appear to override that option, and, in fact, when selected, I cannot find were this visually affects any of the dates within my GoldMine except possibly the Status Bar.

Note

Corporations in this century, that have purchased GoldMine for the first time, do not really need to concern themselves or their users with the EPOCH setting.

The next option is to **XX Set EPOCH Year**, and is a spinner control that increments and decrements in units of five at a time when using the spinner control. The user may just type a number into the field if they find that to be easier. This setting came into being to confront the **Y2K** issues that were expected around the turn of the century. A lot of users had upgraded their GoldMine through the years, and a lot of the older dates were stored with two digit year dates. This was the solution that was developed to instruct GoldMine in how to interpret those two digit year dates. The default setting is **50**. Whatever this setting is, GoldMine will consider any two digit year that is less than the number to be in the current century, and, conversely, any number that is larger than or equal to the number to be in the previous century. Therefore, with the default setting of **50** the date 6/17/49 would be reinterpreted to represent 6/17/2049 while 10/11/52 would be reinterpreted to be 10/11/1952. This will have no affect on years that are stored in the GoldMine tables with four digit years, and will only affect old time users of the GoldMine product who have been continuously upgrading. New GoldMine Premium installation users should probably just ignore this setting. Hmmmm! If anyone still has the old two date years at the end of the start of next century this could cause issues. Who cares, we won't be around to see it.

New to GoldMine Premium 8.5 is the addition of three single option frames. And the first new addition is the **Activity tab** frame with its' single option of ☐ **Show activity code in history tabs**. You long time readers of my books will remember this as a GUIless ini setting described in that section of this chapter. In fact, here is the old write up:

■ Tabs - Displaying the Activity Code under the History tab

I use Activity Codes extensively in my organization. I use them for invoicing, for projects, as well as Contracts. I would like my users, when looking on the **History** tab, to be able to see the activity code for the various activities. I do not want them to have to take the extra steps of zooming, and closing the zoom, just to read the Activity Code. To facilitate this, I inserted the following statement into each UserID.ini (actually I did a User Override in the GM.ini):

```
[CalObj]
HistShowActvCode=1
```

This is much more informative at a glance, and I find it to be very helpful in the way that I have defined my organization, and its usage of GoldMine Premium.

The next options that we must talk about is the **Classic toolbar** frame with its' one option of ☐ **Show button text**. Choosing this option will display any classic buttons, like when reading your E-mail messages, about 4 times the default size, and display up to two lines of text about each buttons capability. I do not recommend the selection of this option as it forces some buttons off screen. I prefer the default setting, and, if I am unsure of the buttons function, I simply hover the cursor over the button 2 milliseconds until the Tool Tip displays the buttons functionality. This particular option is contained in a different section of the UserID.ini, hence I display it here:

```
[Toolbar]
ButtonText=1
```

In the final frame, **Help**, our one option is to ☐ **Show tips at startup**, which is itself, self-explanatory, and when selected would appear in the UserID.ini as:

```
[Warning]
ShowTipOfTheDay=1
```

Now let's move on. And, lastly, on the **System** tab at least, we have a field for the **MS Outlook username if not the same as the GoldMine user:**. This is important, if for instance, the user desired to look at their Outlook information from within the E-mail Center, and the user maintained a different username than that which they have as their GoldMine username. In the default configuration, GoldMine will attempt to access the Outlook application using the GoldMine username. The user is encouraged to assign the same username for both their GoldMine and their Outlook. However, if

they do not have the same username on both systems, then this is the field in which the user is to tell GoldMine the username to employ when accessing their Outlook data.

The result of having set all of these options under the System tab could show in the UserID.ini as:

```
[GoldMine]
GMClassicMenu=1
ShowStatusbar=1
DateInLocalFormat=1
TimeIn24Hr=1
EPOCH=50
MSMailUser=Waldo
```

Speller

The next tab that one encounters is the **Speller** tab. FrontRange had switched their spell checking software to a more robust model back around GoldMine 6. This tab, though it contains user options, does not store these options in the UserID.ini that I have been discussing so far, the one that is in the root folder of GoldMine. These dictionary settings are also stored in a UserID.ini, but these are stored in a username folder under the **Speller** folder which is under the root GoldMine folder. So if the **UserID** of the user were **DJ**, they would have a file like **...\GoldMine\DJ.ini** as well as a file like **...\GoldMine\Speller\DJ\DJ.ini**. While you are examining the latter folder, you will also notice that there is another file here like **...\GoldMine\Speller\DJ\DJ.tlx**.

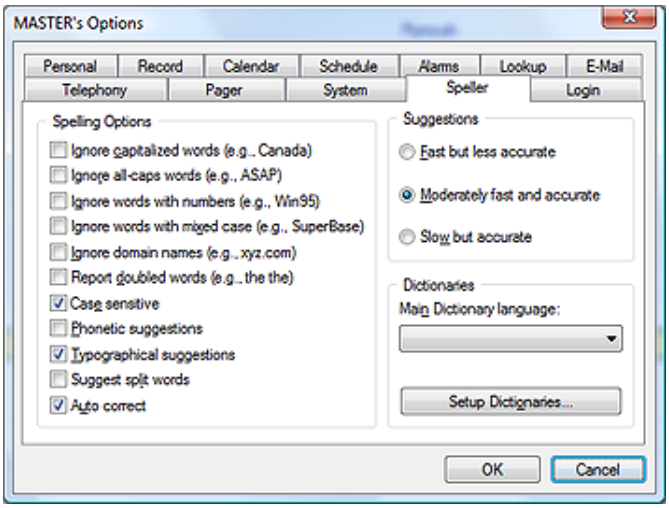


Figure 3-43

> **Note**
>
> *The ***.tlx** file contains the users personal dictionary, and may be edited in GoldMine Premium using the **Setup Dictionaries...***

Looking at Figure 3-43, one will ascertain that there are three different frames. The **Spelling Options** frame with its eleven checkbox options, the **Suggestions** frame with its one radio button selection, as well as the **Dictionaries** frame. Let's take a closer look at the first frame, **Spelling Options**.

The first checkbox option in this frame is to ☐ **Ignore captialized words (e.g., Canada)**. This clearly instructs the spell checker to ignore, what is known as, proper names.

The next option is to ☐ **Ignore all-caps words (e.g., ASAP)**. Again, with the given example, this is fairly clear. If selected, the spell checker will ignore acronyms such as the shown example. Also initialized names such as DJH will be ignored.

The user, in the next option, may choose to ☐ **Ignore words with numbers (e.g., Win95)**. Again, we have the obvious. The examples given with each option are very descriptive on this tab of the user options GUI. By the way, had I selected the previous option, the word GUI would have been ignored when spell checking this chapter. In this case, if selected, and the word contains numbers, the spell checker would ignore the word.

The next option comes into play quite a lot, especially where the name of the product is GoldMine. The user may select to ☐ **Ignore words with mixed case (e.g., SuperBase)**. Okay, you ask: "Why wouldn't you think that, as an example of mixed case, FrontRange would have used the word GoldMine or FrontRange?". To which I would have to answer: "I have no clue.". Many times, one will employ the camel back style word in their notes, and it may be beneficial to ignore these when performing a spell check.

Plodding forward, we see the option to ☐ **Ignore domain names (e.g., xyz.com)** which would always be interpreted as a spelling error. I always select this option as it will ignore domain names as well as Internet addresses.

As I make this error often, the next option is another that I would always select. It is the option to ☐ **Report doubled words (e.g., the the)**. Not **that that** is a problem for us, but I like to select it anyway.

The next option is selected in the default configuration. The ☑ **Case sensitive** option is selected. With this option selected, the spell checker will evaluate the word Maple as being different from the

word maple. If one or the other is not in the dictionary, then the one not found will be considered as a spelling error.

☐ **Phonetic suggestions**, if selected, would have the spell checker offer, in the suggestion list, words that have a similar soundex value. In laymans terms, words that sound the same as the targeted word.

☑ **Typographical suggestions** is selected, in the default configuration, and has the spell checker offer suggestions of words that have a similar character content as the targeted word. This helps to pick up spelling errors with transposed letters that often happens with flying fingers on the keyboard.

☐ **Suggest split words** is the next option, and, again, it is not selected in the default configuration. I'm going to just go with the GoldMine Help file definition here, as I have not quite deduced what this actually means. *"Suggest split words: Suggests two words for compound words that do not appear in the dictionary."* What I believe this to means is, if the user were to type in bigman, then the spell checker would suggest big man.

☑ Auto correct is an option that lets the spell checker automatically correct words if they are defined as *"Auto Change (Use case of other word)"* or *"Auto Change (Use case of checked word)"* when classifying the Action: for any words that one defines in their own dictionary. When not selected the user will be prompted before any word, so designated, is changed.

This ends my discussion of the **Spelling Options** frame. The UserID.ini settings that are affected by changing these settings are shown here:

```
[SSCE User]
IgnoreAllCapsWords=0
IgnoreCappedWords=0
IgnoreDomainNames=0
IgnoreMixedDigits=0
IgnoreMixedCase=0
IgnoreNonAlphaWords=1
ReportDoubledWords=0
CaseSensitive=1
PhoneticSuggestions=0
TypographicalSuggestions=1
SuggestSplitWords=0
```

WARNING

Although GoldMine Premium offers the user the ***Suggestions*** *option, FrontRange does not recommend that the user modify this option at all. It has been set to allow for the optimal performance of GoldMine as its default setting.*

The next frame of concern under this tab is the **Suggestions** frame. There is but one option to set under this frame. The possible radio selections are:

	[SSCE User]
○ **Fast but less accurate**	MinSuggestDepth=25
◉ **Moderately fast and accurate**	MinSuggestDepth=50
○ **Slow but accurate**	MinSuggestDepth=75

The default setting is the ◉ **Moderately fast and accurate**, however, the user may choose to opt for better accuracy. This selection determines the size of the resulting suggestion list based on the users **Spelling Options**. The resulting changes to the UserID.ini are shown adjacent to each radio button option.

The last frame on this tab is the **Dictionaries** frame, and it is here that the user may select from any one of eighteen different dictionaries to use as your **Main Dictionary language:**. Your users would simply select the dictionary of choice from the drop down list. The default dictionary for my installation was **American English**, however, this was based on my type of installation. The UserID.ini controlled by this selection is:

```
[SSCE User]
MainLexFiles=ssceam.tlx,ssceam2.clx
```

In this frame, there is also a button **Setup Dictionaries...**, and this is to allow one to work with different personal dictionaries. The main use here is for the user to be able to modify their personal lexicon file which, in my case, is the file named **DJ.tlx**. The user may add, delete, import or export words to the selected dictionary. Additionally, the user may add different dictionaries, and maintain them here as well.

Login

The **Login** tab, as shown on the next page in Figure 3-44, is only available to those users that possess Master Rights. It is not hard to realize, any changes made under this tab, will affect all users of GoldMine. These settings and options, then, are not stored in the UserID.ini, but instead are stored in the GM.ini file.

WARNING

One of the most common questions asked by GoldMine users is, "How come GoldMine is always trying to login as MASTER?". Always, it is the name of the last user having Master Rights who clicked on the ***Login*** *tab, and then clicked on the* ***OK*** *button anytime after that. Doing this, whether they made changes or not, adds the line* ***User=SOMEONE*** *to the* ***GM.ini*** *file. All network users from that point forward will default to that login name. This instruction to GoldMine can only be removed employing NotePad, and can never be removed through the GUI.*

The first three settings will be preset for you based on your installation. GoldMine will default these settings for the users initially. The GoldMine Administrator may only need to change these settings if they have moved GoldMine to a new server, for instance. All of these settings, or rather the results of these settings are reflected in GoldMine under the **Help** | **About GoldMine...** | **System** button option.

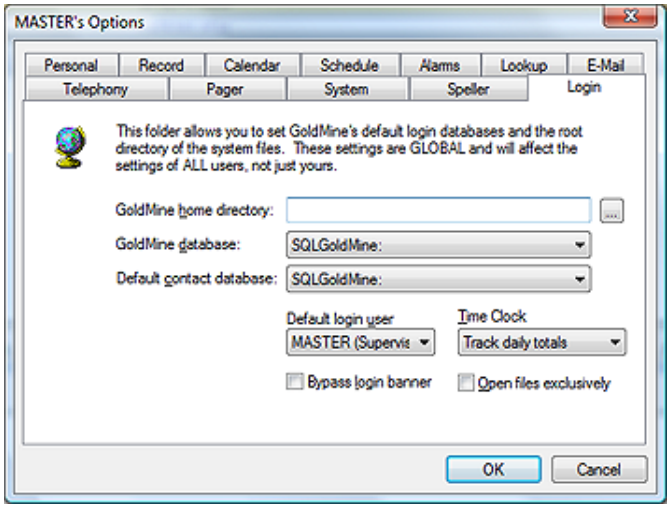


Figure 3-44

The next setting is the **Default login user** field, which defaults to the currently logged in UserID. If the GoldMine Administrator clicks on the **OK** button for these **Options**, any time after being on this tab, that users login UserID will be saved to the GM.ini file. Please read the sidebar **WARNING**.

The **Time Clock** setting is also available on the **Login** tab. This is a drop-down list that has but three choices. The GoldMine Administrator may choose to **Disable the clock**, to **Track daily totals**, or, lastly, to **Track each login**. The default setting, as shown in Figure 3-44, is to **Track daily totals**. I discussed the **Time Clock** tab when I talked about setting up new users in the GoldMine environment. I have seen very few corporations, if any, use this feature. Most, however, forget to **Disable the clock** here forcing GoldMine to continually build, and to maintain unused logs. The three settings speak for themselves.

☐ **Bypass login banner** is not selected in the default configuration. Should your users not be using passwords in GoldMine, this setting will cause them to pass right into, and through the login splash screen, without stopping. GoldMine should start up exactly where the user last left their GoldMine configured (cross your fingers). I have found that this option, in GoldMine Premium, is pretty much ignored at login time in favor of the settings of the shortcut. Let's say that a user has a password, the shortcut could be configured:

```
G:\GoldMine\GMW.exe /u:UserID /p:Password
```

The user, clicking on this shortcut, would be teleported directly into GoldMine without stopping at the splash screen.

The last option, on the **Login** tab, is to ☐ **Open files exclusively**. In a network environment, no one should ever have cause to select this option. Selecting this option, though it may speed up access time for the single user that first logs in, will lock out all other users from the selected GoldMine database. This is no longer a recommended setting for either the Network or Stand-a-lone installation as it no longer has any effect. It may have been best if FrontRange had simply removed this option all together.

Note

Our old timers will recoginize that this is a significant change over GoldMine Corporate Edition 6.7 for instance.

GoldMine Corporate Edition 6.7:

GoldDir=MSSQL:GoldMinePE:dbo:

GoldMine Premium:

GoldDir=GoldMinePE:

The following are some of the possible settings that could be present in the GM.ini file based on entries made on the Login tab:

```
SysDir=Y:\GoldMinePE\
GoldDir=GoldMinePE:
CommonDir=GoldMinePE:
User=DJ
UserLog=1
Exclusive=1
```

Global System Settings

Before we move into our GUIless Settings, as we have in previous editions of this book, we are going to discuss a new GUI incorporated into GoldMine that will prevent the need for some of those GUIless Settings that we discussed in the past. This option can be found off of the GoldMine menu if the logging in user has Master Right.

Tools
Configure ►
System Settings

WARNING

Both of these settings must be in the form of a UNC path, and you may not utilize mapped drives.

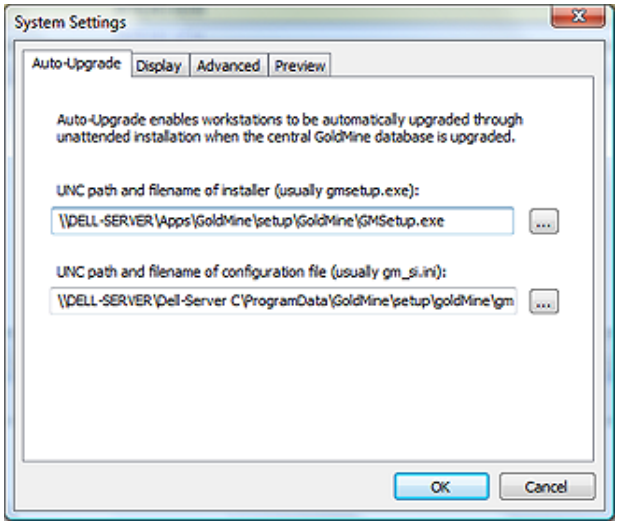


Figure 3-45

The **Auto-Upgrade** tab is the first tab to display. It is on this dialog form that you may establish the paths to the various components that will permit Workstations to be automatically upgraded via an unattended installation after the Network database has been upgraded.

The first such path that must be defined is the **UNC path and filename of the installer (usually gmsetup.exe):**. This is usually under the \\Server-Name\Apps\GoldMine\Setup\GoldMine folder, but not always. Hence, you have the option to designate the true path.

And the second path is the **UNC path and filename of configuration file (usually gm_si.ini)**, but again not always. If you utilized the defaults, then that will be the file name, however, only you know for certain where you asked to have it saved. If you accepted the defaults during the initial installation, then it could be in \\Server-Name\C\ProgramData\GoldMine\Setup\GoldMine\GM_SI.ini.

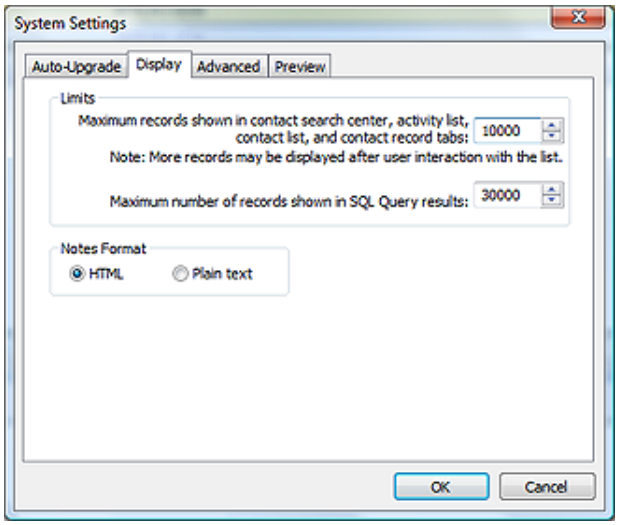


Figure 3-46

Moving forward to the **Display** tab, we can see 2 frames, **Limits** and **Notes Format**. In the prior books the **Limits** options were taken care of as GUIless settings as shown here:

■ Display Limitation - F2 Look-up list display override

In the default configuration of the F2 Lookup list, the list is limited to displaying 1000 items. I had one client that wanted to show some 1250 items in their list (read all about the F2 Lookup list in a later chapter). The UserID.ini came to the rescue with the use of this statement:

```
[GoldMine]
MSSQLMaxBrowseRecs=2000
```

As simple as that, the problem was solved. Again, however, I had to insert this statement into each and every UserID.ini on their network. This is yet another case for the use of the Corporate Override that I will discuss later as part of the GM.ini. What a hassle, as there is no GUI within GoldMine to assist the GoldMine Administrator with this task. All of these edits must be done using a utility application like Microsofts NotePad.

■ Display Limitation - SQL Query tables display override

Later in this book, I plan to demonstrate SQL Queries, and how to output their results to Word, Excel or the Clipboard. In the default configuration, GoldMine will produce a query result table (cursor) containing up to 10,000 records. What if you had 18,000 contacts in your database, and you wanted to send that information to Excel, which would then need to be forwarded to your mailing house? You might be able to export the information from GoldMine, however, if it were any information other than that which is contained in the Contact1 and Contact2 tables, you couldn't export it using GoldMine. Let's say you want Additional Contacts, and you want their E-mail Address as well as the Primary Contact with their E-mail Address. The default SQL Query limit of 10,000 is way too low for most users of GoldMine, why don't we just raise that query limit to say 30,000 records. That should suffice for this job anyway. You can raise the limitation yourself.

This would be the UserID.ini setting to raise the SQL Query limit to 30,000 records:

```
[GoldMine]
SQLQueryLimit=30000
```

Today, however, these are handled in the GM.ini via a **User Override**, when using the **System Settings** | **Display** GUI. The settings displayed in Figure 3-46 are represented here:

```
[User-Override:GoldMine]
SearchTopRec=10000
MSSQLMaxBrowseRecs=10000
SQLQueryLimit=30000
```

In the **Notes Format** frame you have but one option. The option is to have your Calendar and History Notes as ◉ **HTML** or as ○ **Plain text** notes. This, also, was previously taken care of via a GUIless setting in the GM.ini, but today is taken care of via the **System Settings** GUI:

```
[GoldMine]
HTML_Cal_Notes=1
```

Again, we can move forward to the **Advanced** tab which contains two frames the **Contact's permissions** frame, and the **Universal Search** frame.

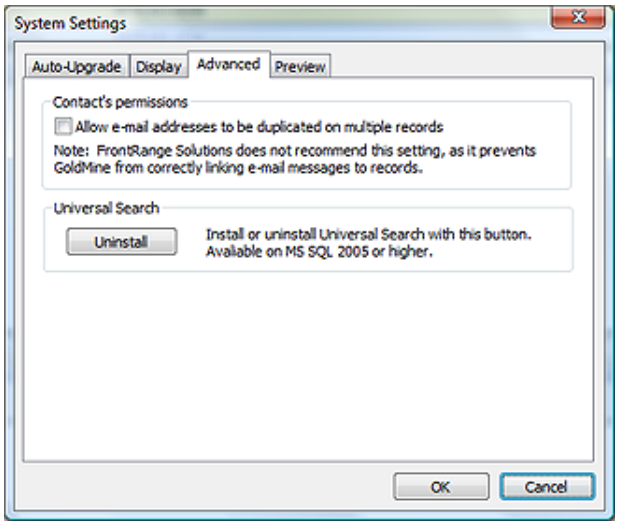


Figure 3-47

As always, we begin at the top and work our way down so the first frame to be discussed is the **Contact's permissions** frame which has a single option: ☐ **Allow e-mail addresses to be duplicated on multiple records**. This is yet another GUIless option that has received a GUI for manipulating its entry. From my previous book:

■ Contact Record - Permitting duplicate e-mail addresses in the ContSupp table

In older versions of GoldMine, GoldMine used to be able to accept a duplicate e-mail address in the ContSupp table. Somewhere along the way that feature got waylaid. GoldMine, in the default configuration, will only accept one instance of an e-mail address in the ContSupp table. The users wanted the ability to have the same e-mail address associated with different contact records, hence, the inclusion of an organization wide ini setting. FrontRange allows for the placement of the following statement in the GM.ini file:

```
[GoldMine]
AllowDupEmails=1
```

The 1 tells GoldMine to allow duplicate e-mail addresses, while a 0 in this statement would return GoldMine to its default state.

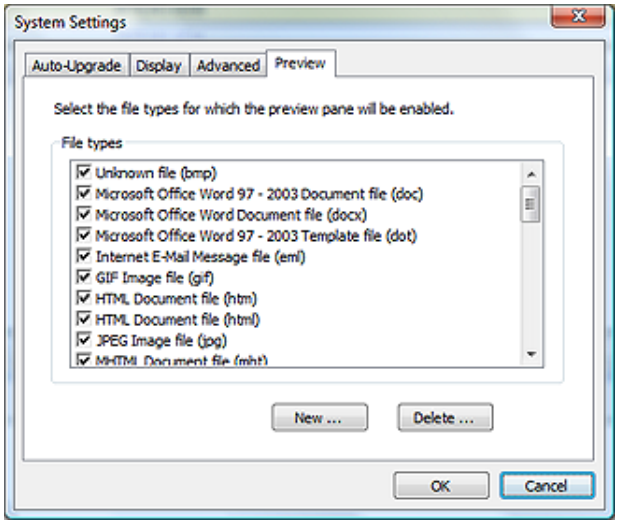


Figure 3-48

Well then, let's move on to the **Universal Search** frame. If you did not install Universal Search when you were upgrading or installing your GoldMine Premium 8.5 then this is the place that you would do this. As you can see in Figure 3-47, I already have Universal Search installed, hence, the button now reads **Uninstall**. What can I say? Click the button.

Finally, we have reached the last tab, Figure 3-48, that being the

Note

*It might be interesting to note that the single setting for the **Maximum records shown in contact search center, activity list, contact list, and contact record tabs:** via the GUI will translate to the two statements in the override:*

```
[User-Override:GoldMine]
SearchTopRec=10000
MSSQLMaxBrowseRecs=10000
```

WARNING

I strongly recommend that you be aware of the Note that FrontRange has added to this frame option, so much so that I am going to repeat it here:

Note: FrontRange Solutions does not recommend this setting, as it prevents GoldMine from correctly linking e-mail messages to records.

Note

*To Install Universal Search, one must first have **Full Text Search** capabilities established and running within **SQL Server**. Without that, you will not be asked to Install Universal Search nor will the Install button, Figure 3-47, be enabled for use.*

Preview tab. It is here that the Administrator may designate the varies File Types for which the GoldMine Preview panels will be enabled. In the **File types** frame is a list of types, and all, in their default state, are selected (checked). It would be up to the administrator to check or uncheck any for which they do or do not want the Preview panel enabled.

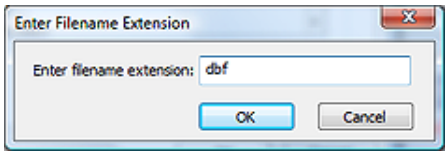


Figure 3-49

Additionally, the Administrator may add any **New...** or **Delete...** any existing extensions. For instance, I added the dbf extension to my list by simply clicking on the **New...** button, and entering the extension into the **Enter Filename Extension** dialog form as shown here in Figure 3-49. A simple click on the **OK** button, and the extension is added to the list and selected upon creation. I mean, why add it if you don't want it enabled?

A simply click on the **OK** button on the **System Settings** dialog form saves all of the changes to the various ini's. These particular settings are entered in the GM.ini similar to:

```
[PreviewPane]
FileTypes= bmp; doc; docx; dot; eml; gif; htm; html; jpg; mht; mhtml; mpd; mpp; mpt; mpw; mpx;
           msg; oft; pdf; png; pps; ppt; pptx; rtf; txt; url; xl; xla; xlc; xlm; xls; xlsx; xlt; xlw; xml; zip;
           dbf;
CheckedTypes=1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;1;
```

Note

*This is probably obvious, but the extension should be a registered extension on the operating system. For instance, when I added the dbf extension, GoldMine picked up the relationship from my system of ☑ **Microsoft Visual FoxPro Table file (dbf)**. Well I am a Visual FoxPro developer after all.*

Note

*Please note that the **[PreviewPane]** line wrap shown here would appear as a single line of text in the GM.ini within the 256 character statement limitation.*

GUIless Ini Statements

Note

FrontRange is constantly enhancing the GoldMine product. A lot of these enhancements include the addition of user options through the use of the UserID.ini. The user, and GoldMine Administrator should spend time in the GoldMine Forums to keep up with the latest information about GoldMine.

Okay, now let's see if I can remove all of the GUIless ini statements from my book that are now handled through the new GoldMine Premium GUIs. There are some entries to the UserID.ini file, as well as the GM.ini file that can not be made through the use of the GoldMine GUI. These entries must be made by hand to the appropriate ini file, and I suggest that the GoldMine Administrator making these changes use Microsoft NotePad. I have tried to cover some of the more popular statements that can be entered into the UserID.ini or GM.ini. I certainly could not cover all of the possibilities as they are constantly in flux. As a GoldMine Administrator, you would be wise to review all of these possible settings, as I'm positive that you'll find a couple that will meet your corporate paradigm.

■ Contacts Additional - Defaulting the Additional Contacts to use the Address information of the Primary Contact record

This addition has been a long time in coming. In fact I wrote an application 10 years ago to facilitate the addition of **Additional Contacts** to the Primary record. Now my Additional Contacts application has been made obsolete with this new UserID.ini entry, and, of course, you can use the corporate override in the GM.ini to set this for all network users.

```
[GoldMine]
AutoFillAddlAddress = 1
```

This is equivalent to selecting the ☐ **Auto-fill with Primary Address** you see when you are creating a New Additional Contact within GoldMine. This is a sticky setting for each UserID, and in that there is this GUI option within GoldMine that can change the setting, if you wish to maintain this setting in any state, you should consider a User Override.

■ Contact Record - Duplicate checking when creating New Contacts

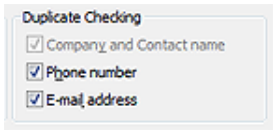


Figure 3-50

When creating a **New Contact** record in GoldMine there is a **Duplicate Checking** frame with options. These settings have changed drastically. Refer to Figure 3-50 for the Duplicate Checking frame as it appears today. These are sticky options such that the user could set them here, and this would maintain the same settings the next time that the user was to create a New Contact record or a New Company record. I thought, however, that you would be interested in various settings in case you decided to use your ability to do a User Override. First I must tell you that the statement in the UserID.ini that controls which of the options are selected, and which of the options are not is:

```
[GoldMine]
NewRecordOpt=4336
```

This statement, as shown, is the default setting within GoldMine Premium, however, being that it is the default it will not be displayed in the default UserID.ini when the user first starts GoldMine Premium. Here are the various possible settings:

Company & Contact	**NewRecordOpt = 4288**
Company, Contact & Telephone	**NewRecordOpt = 4304**
Company, Contact & E-mail Address	**NewRecordOpt = 4320**
Company, Contact, Telephone & E-mail Address	**NewRecordOpt = 4336**

Contact Record - Microsoft Outlook E-mail as a GoldMine History Activity

In the default configuration, whenever a user chooses Send Outlook Message..., GoldMine will create a History activity. This activity will contain no information from within the E-mail message itself, but will only indicate, E-mailed via MS Mail. This is only an indication that the activity was performed. The user, or the GoldMine Administrator, may wish to turn this feature off. The UserID.ini statement for turning this feature off is:

```
[GoldMine]
MSMailHistory=0
```

E-mail Address - Automatically copy the Domain of the Primary E-mail Address when creating a New E-mail Address

I know many have asked for this, however, I don't see it as being particularly useful. With this ini statement, when a user selects to create a New E-mail Address, everything from the Primary E-mail Address Domain, including the @ sign, is automatically completed for the user in the E-mail Address field. From there, the user just needs to add the user name associated with that E-mail Address.

```
[GoldMine]
AutoFillEmailAddr = 1
```

E-mail Limitation - To change the limitation on capacity for the E-mail Center folders.

This setting will also affect performance, and may cause performance related issues. Should you or the user wish to increase or decrease the folder capacity of the E-mail Center folders, it may be accomplished with this setting in the UserID.ini:

```
[GM_Mail_Center]
MailListCapacity = 2500
```

E-mail Center - Performance settings

1. When messages are deleted in the E-mail Center, they are not immediately deleted from the server until the connection is closed. This behavior provides the fastest performance, but can cause deleted messages to reappear as duplicates in some scenarios. If this problem appears, the following UserID.ini setting can be used:

   ```
   [Internet]
   PopImmediateDelete=1 ( closes server connection after each message is deleted )
   ```

   The default value for this setting is 0, which keeps the connection open after deleting a message.

2. GoldMine automatically sends periodic messages ("no-ops") to the e-mail server to keep the connection open for fast response time. By default, these messages occur every 10 seconds. Some e-mail servers require more frequent messages to maintain the connection. To change the frequency of these messages, use the following UserID.ini setting:

   ```
   [Internet]
   PopNoopTimer=nnnn ( where nnnn is the number of seconds between messages )
   ```

3. GoldMine automatically disconnects from the e-mail server if it has no related activity for 10 minutes, by default. This is useful, for example, when using both the Online and Auto-retrieve options with an e-mail server that permits only one connection. To change the time delay before automatically disconnecting, use the following UserID.ini setting:

   ```
   [Internet]
   PopIdle= nnnn ( where nnnn is the number of minutes until disconnect )
   ```

E-mail Center - Change the default refresh rate

In older versions of GoldMine, prior to GoldMine 6.7, GoldMine had a fixed refresh rate. With the release of GoldMine 6.7 the user was permitted to change the refresh rate by hand entering this statement into their UserID.ini:

```
[Internet]
FolderRefreshDelay=60000
```

This setting may or may not have any effect in GoldMine Premium.

Note

*Please note that the user must enter the **FolderRefreshDelay** in milliseconds. The minimum **FolderRefreshDelay** setting is **60000** milliseconds which represents a time delay refresh of **1 minute**.*

Note

*Please note that this setting is **sticky**, hence, if the user changes this while in GoldMine, that change will be reflected in the UserID.ini for the next time. To circumvent this, you may want to consider a User Override.*

■ E-mail Merge - Contact Selection

The default E-mail Merge Contact Selection setting is ⦿ **This contact:**. To have the default be the ○ **All contacts linked to** option or the ○ **All contacts in the following filter/group:** option the UserID.ini section, the setting would be:

```
[EmailMerge]
ContSel=0 ( This contact: )
ContSel=1 ( All contacts linked to )
ContSel=2 ( All contacts in the following filter/group: )
```

This section may or may not exist in the UserID.ini. If it does not exist in the particular UserID.ini simply add the above in its entirety. If it does exist, then just add the statement in the appropriate order.

Note

*Again, you may want to consider a User Override for the **Delivery** frame option.*

■ E-mail Merge - Queue for delivery as default instead of Send E-mail

The default E-mail Delivery setting is ⦿ **Send now**, and many GoldMine Administrators find that to be just plain wrong. Too many e-mail blasts go astray when this is the default setting. One is often better enforcing the ○ **Queue for delivery** option, and having your misapplied e-mail blasts going to the queue rather than going out to the clients directly.

```
[EmailMerge]
Delivery=1
```

This section may or may not exist in the UserID.ini. If it does not exist in the particular UserID.ini simply add the above in its entirety. If it does exist, then just add the statement in the appropriate order.

WARNING

Should you set this option to display AP flow, you want to make certain that you remove the option when you are done with your AP testing. This has been known to cause processing issues..

■ Programmers - Display AP Flow within the GoldMine Process Monitor

There has been a need to debug an Automated Process for a long time now. To facilitate this, FrontRange has added the ability to switch On/Off the flow of the processes through the GoldMine Process Monitor. This is done individually within the UserID.ini. This is the switch statement:

```
[GoldMine]
APDebugLog=1
```

This is a typical result of said action:

```
0[1] Automated Processes  [1:12 pm - 6/24/2009]
0[1] Scanning Contact: Computerese; DJ Hunt
0[1] Read Track:  Update Department Field  [Next Event: 100, Track: 9G4RA45$W=98R#Y]
0[1]    100   Test Update Field
0[1]          --> Triggered.
0[1]              Update Field: DEPARTMENT with DJ Hunt
0[1]     Remove ended track: 9G4RA45$W=98R#Y
4[1] Automated Processes: 1 Contacts; 1 Scanned; 1 Triggered; 1 Pass(es)  [Ended 1:12 pm - 6/24/2009; Dur: 0:00]
```

As you can see this could be valuable information when trying to debug an Automated Process. Of course, if you are perfect, and never make a mistake when developing your AP's this is, naturally, not required.

■ Programmers - Option to trace DDE issues within the GoldMine Process Monitor

How many of you have developed an application that uses DDE to converse with GoldMine, and it does not. The conversation never takes place that you are aware of. You could put this statement into your UserID.ini to allow you to trace, within the GoldMine Process Monitor, all of the DDE conversations that were processed by GoldMine.

```
[GoldMine]
DDEMonitor=1
```

Having put this into my DJ.ini, I was able to follow the conversation shown below within the GoldMine Process Monitor window. I copied it to the clipboard, and pasted it here for your review. In your case that might resolve to printing it for analysis.

```
0[1] DDE Monitor  [3:04 pm - 6/24/2009]
0[1] DDE In : &Version
0[1] DDE Out: 8.5.1.6
0[1] DDE Monitor ended  [Ended 3:04 pm - 6/24/2009; Dur: 0:00]
0[2] DDE Monitor  [3:04 pm - 6/24/2009]
0[2] DDE In : &SysDir
0[2] DDE Out: c:\goldmine\
0[2] DDE In : &GoldDir
```

```
0[2] DDE Out: MSSQL:SQLGoldMine:dbo.
0[2] DDE In : &CommonDir
0[2] DDE Out: MSSQL: SQLGoldMine: dbo.
0[2] DDE In : &UserName
0[2] DDE Out: DJ
0[2] DDE Monitor ended  [Ended 3:04 pm - 6/24/2009; Dur: 0:00]
```

■ Reports - To Snap to Grid or not

This is one of my personal peeves. Whenever I would go into a report in layout mode, I would first have to remember to right-click, select Grid Settings, and to then unselect ☑ **Snap to Grid**. Also, I can't tell you how many times that I forgot to do that, and totally messed up a report that took a long time to create. Until, that is, I found the UserID.ini setting to set the snap to grid option to default to unselected. That option is:

```
[GraphObj]
Grid=0
```

Let me tell you, right here and now, this one setting has saved tons of headaches and frustrations. One setting is worth a thousand screams of frustration.

■ Scheduled Activities - Private automatically selected when scheduling activities

A similarly functioning setting to the **OnByDefault** setting, in the UserID.ini, is the ability to have the ☑ **Private** option selected by default when scheduling a new activity. This is, again, set by using the RecType for the activity to be designated as private.

```
[ActvObj]
PrivateActvity=ACTDO
```

I must point out the spelling of the statement above. Even though this may appear to be a typographical error, it is, in fact, correct. Adding the i to Activity would cause this statement to not function. The reader is reminded that they may change the instructions on the right side of the equation, but not on the left side.

Note

*Please note, as of this writing, the **M**, message option, does not function in the **PrivateActvity** statement. Additionally, there can be no private selection for the **S**, sales option.*

■ Tabs - Renaming the default GoldMine tabs

Here is a little feature that the FrontRange people shy away from, for what I believe should be, obvious reasons. How many times have you been asked, "Can't we change the name on this tab to something more meaningful to our organization?", and of course it has always been one of the default tabs that they wanted changed. Well there is a way within the UserID.ini, although, if you are going to do this, I would recommend that you use the Corporate Override. Let's say that you wanted to change the tab named Notes to now display Memos, this is how that would be accomplished via the UserID.ini:

```
[GoldMine]
ROTabs1=&Summary,&Fields,GM+&View,&Notes,Additional&Contacts,&Details,&Referrals,&Pend-
ing,&History,&Links,&Members,Pr&ocesses,Opport&unities,Pro&jects,Relati&onships,C&ases,AR_
Aging,
```

If this is a corporate naming convention, the GoldMine Administrator will need to insert this statement into each of the UserID.ini files, one at a time unless you opt to use the User Override which I will discuss later in this chapter. Also, should you rename any tab, do not call FrontRange for technical support, and then say my Memos tab is not functioning properly. They will not have a clue as to which tab you may be talking about, and will not be able to assist you with your problem. This applies to any of the GoldMine default tabs that you, or your organization, may wish to rename.

Note

*In the **ROTabs1** statement the user, or GoldMine Administrator, must supply a name for each of the GoldMine default tabs. If this is not done, then those tabs for which a name was not supplied, will still remain, but will have no label identifying their contents.*

Note

*Did you notice the **&** as part of some of those tab names?*

&Summary,&Fields, GM+&View

*These **&**'s designate a hot key for quickly moving between tabs. Be careful, if applying your own hot keys, as they may conflict with already defined hot keys.*

■ Warnings - Turning On/Off Various Warnings within GoldMine

GoldMine warns you about deleting an E-mail, but then offers a checkbox to disable any future warnings. There is no GUI to turn this feature back on. You must do this by modifying the UserID.ini. Here are some of the various warning messages, in GoldMine Premium, that can be manipulated manually.

```
[Warning]
InetWarnAboutDelete1=0
InetWarnAboutRTF=0
BrowseSort=0
ORGCHARTDRAGWARN=0
WarnAboutSCSpeed=0
InfoWarnAboutDrag=0
WelcomeRecTypes=0
WelcomeGoldSync=0
```

Note

*Remember that a **0** is **Off** while a **1** is **On**.*

Note

*You may want to consider a **User Override** for these annoying warnings. User Overrides are discussed later in this chapter.*

```
WelcomeInfoCenter=0
WelcomeAutomatedProcesses=0
WarnAboutWebImport=0
WarnChangeMasterPwd=0
WarnAboutImport=0
WarnMakeBackup=0
WarnAboutDeleteRecords=0
WarnCMTemplatesEmail=0
WelcomeInetEmailRules=0
WarnAboutGlobalReplace=0
NotesLimit=0
WarnAboutMergePurge=0
WarnAboutCopyMoveRecords=0
WarnAboutMaintain=0
WarnAboutEMailMergingWhenSMime=0
WelcomeDistList=0
WarnAboutCompleteMultiLinkActiv=0
WarnAboutDeleteMultiLinkActiv=1
WarnAboutEditMultiLinkActiv=1
WelcomeCampaignManagementCenter=0
WarnCMTemplatesWrite=0
WarnCMFilterGroupActivate=0
InetWarnAboutMerge=0
ORGCHARTROLLUPWARN=0
WarnAboutPalmDesktop=0
WarnCMSalesForecast=0
```

GM.ini

The GM.ini has never had a GUI to assist in its creation save for the **Login** tab under the Master Rights users Options, and now some overrides via the System GUI. Through the remainder of this chapter I will be discussing some of the statements that are applicable in the GM.ini. One major feature that I will be discussing is the ability to override the UserID.ini Options via the GM.ini to present a solidified corporate approach to your GoldMine presentation and usage.

■ Additional Contact - Fax Label nomenclature

The Additional Contact has had a **Fax:** label for the associated field for some time. FrontRange has listened to the end user, and they understand that more Additional Contacts are apt to have a Mobile telephone while it is less likely that they would have a Fax. Hence, GoldMine no offers the ability to change the label of this field using the following statement:

```
[GoldMine]
AddContactFaxLabel = Mobile ( or any other label that you may choose )
```

■ Block Execution/Launch - Stop GoldMine from running Attachments via their launch registration

This switch is a rather long one, and could have been longer (up to 256 characters in length). This statement blocks attachments from executing from inside of the GoldMine E-mail Center. All of the listed types of attachments could still be present within the message, however they will not automatically execute/launch from within the GoldMine environment when you double-click on the attachment in the e-mail.

```
[GoldMine]
BlockAttachExecution=asp,bat,com,doc,exe,htm,html,inf,js,jse,lnk,nws,pif,pp,ppt,scr,vbe,vbs
```

■ User Override - Overridding the users Options at the corporate level

Through the GM.ini, you, the GoldMine Administrator, can set a corporate display/functionality presence for your GoldMine. Regardless what the users choose for their Options at their level, you can override these at the corporate level. Although this won't prevent the user from changing their own Options, when next they log into GoldMine the overridden options will be reset to the corporate standard.

Now I can discuss the UserID.ini override options syntax. You now have the option of adding new sections to the GM.ini.

These sections take the form of:

```
[User-OverRide:<User.ini Section>]
```

You may include one override section for each section in the UserID.ini that you may want to override. Here are some of the overrides that I have in our GM.ini for example:

```
[User-OverRide:GMAlarm]
OnByDefault=ACTSOML
[User-Override:GoldMine]
ROTabsGlobalCheck=0
MSSQLMaxBrowseRecs=10000
SearchTopRec=10000
SQLQueryLimit=30000
```

These overrides are a great way for the corporate GoldMine Administrator to enforce corporate standards for their GoldMine.

Here is a override that I discussed earlier in a sidebar Note. This override will establish, at the corporate level, the GoldMine Warnings as they are desired for the corporation. Regardless of whether the user tries to turn them off, they will re-establish themselves the next time that the user starts GoldMine.

```
[User-Override:Warning]
InetWarnAboutDelete1=0
InetWarnAboutRTF=0
BrowseSort=0
ORGCHARTDRAGWARN=0
WarnAboutSCSpeed=0
InfoWarnAboutDrag=0
WelcomeRecTypes=0
WelcomeGoldSync=0
WelcomeInfoCenter=0
WelcomeAutomatedProcesses=0
WarnAboutWebImport=0
WarnChangeMasterPwd=0
WarnAboutImport=0
WarnMakeBackup=0
WarnAboutDeleteRecords=0
WarnCMTemplatesEmail=0
WelcomeInetEmailRules=0
WarnAboutGlobalReplace=0
NotesLimit=0
WarnAboutMergePurge=0
WarnAboutCopyMoveRecords=0
WarnAboutMaintain=0
WarnAboutEMailMergingWhenSMime=0
WelcomeDistList=0
WarnAboutCompleteMultiLinkActiv=0
WarnAboutDeleteMultiLinkActiv=1
WarnAboutEditMultiLinkActiv=1
WelcomeCampaignManagementCenter=0
WarnCMTemplatesWrite=0
WarnCMFilterGroupActivate=0
InetWarnAboutMerge=0
ORGCHARTROLLUPWARN=0
WarnAboutPalmDesktop=0
WarnCMSalesForecast=0
```

■ Display Limitation - Pending Activities (All) in the Activity List

There appears to be a display limitation in the Activity Listing. One user had selected All activities to be displayed, however, they were only able to see activities through January 2007, and they were positive that they had more to be displayed. FrontRange suggested that they add this statement to their GM.ini to resolve the display issue:

```
[GoldMine]
PendingSQLMaxRows=2000
```

■ General Statements - What they are, and what they do

The following are statements from a GM.ini that I would give to my clients that can be modified to their needs and uses. However, it is a beginning point.

```
[GoldMine]
```

There can only be one [GoldMine] section in the GM.ini, and all statements that are applicable to this section must go under this one section header.

The SysDir belongs under this section, and points to the folder where the License.bin resides.

SysDir=Y:\GoldMine

The GoldDir, also under this section, points to the location of the GoldMine (GMBase) database. In my case this is:

GoldDir=GoldMinePE:

While the CommonDir identifies the location of the Contact set database. It is not uncommon for this to be the same location and setting as the GoldDir statement.

CommonDir=GoldMinePE:

Should you want the big brother approach to corporate oversight, you can turn on/off the logging of the users keystrokes, and mouse clicks. As always a value of 0 turns off the option, while a value of 1 turns on the option.

UserLog=0

If you have set up, and use Record Alerts, these will pop up, when you display an alerted record, 7 seconds after you display the record. Personally, I prefer a much shorter interval. In fact, I use 2 seconds, and here is the statement that controls this for me.

RecAlertSec=2

In the old days of yor, GoldMine did not automatically create a Contact2 record for each Contact1 record that was created. This was a space saving feature when space was at a premium. Todays GoldMine creates the Contact1/Contact2 records at the time a new record is created, however, for older versions of GoldMine, this legacy GM.ini statement is still maintained, and it forces GoldMine to create a Contact2 record whenever GoldMine creates a Contact1 record.

NewComplete=1

These are but a few of the statements that can be employed under the [GoldMine] section of the GM.ini.

■ MyGoldMine - Making it YourGoldMine

I have always complained that MyGoldMine is really FrontRanges GoldMine as I had no control over it. John Stillman, of FrontRange, has added some override parameters to the GM.ini where you can now point MyGoldMine to your own RSS feed, or any RSS feed for that matter. This is a totally separate section in the GM.ini, and only functions in GoldMine 6.70.50123 or greater.

[MyGM]
FRS_Title = Title
FRS_URL=http://www.Domain.com/RSS.xml

■ Output Data - Turn On/Off iCal messages

This switch turns off the option to output iCal messages from the Pending tab, Activity List (F6), or the Calendar.

[GoldMine]
AllowiCalOutputTo = 0

■ Output Data - Output Data - Turn On/Off iCal messages

Hand in hand the next switch turns off the Output To menu in the Calendar for iCal and HTML.

[GoldMine]
AllowCalOutputTo = 0

■ Scheduled Activities - Turning On/Off HTML Notes

GoldMine Premium is using Internet Explorer 7 to create and display Notes in History, Calendar, Info-Center, and other areas. Many users have complained about this, especially when reporting against HTML Notes, and FrontRange has decided to add a switch to turn this feature on or off. This switch only applies to Notes in History and/or in the Calendar, and does not affect Notes that were already created prior to utilizing this switch. This is the GM.ini setting to accomplish this:

[GoldMine]
HTML_CAL_NOTES=1 (default)
HTML_CAL_NOTES=0 (turns off the HTML Notes)

Speller - Identifies the path to the Speller files

This statement identifies, to GoldMine, the folder under GoldMine, usually, where the dictionaries are maintained for GoldMine.

```
[GoldMine]
SSCE_PATH=Speller
```

No path is required if the corporation is using the default folder. Many times however, GoldMine Administrators will have these files locally on the workstation for better performance. That activity, and this being the corporate GM.ini, all users must have the Speller folder in the same location on their Workstation, and this pointer must be appropriately set for the corporation.
An example might be:

```
[GoldMine]
SSCE_PATH=C:\GoldMine\Speller
```

User Variables - User variables that are common to everyone in the organization

Global user defined variables can be defined, and employed in merge documents and e-mail messages. Some of these might be the corporate website, the corporate fax, or the main corporate telephone number. This is how you might establish these in the GM.ini:

```
[user_var]
WEB=www.DJ-Hunt.com
PHONE=(978)342-3333
FAX=(978)123-4567
```

X-Mailer ID - Sometimes triggers spam filters

Header information included in GoldMine Outgoing E-mail will sometimes trigger the recipients Spam Filters. GoldMine Administrators may change the course of this action by adding a GM.ini entry that will override the X-Mailer ID.

```
[GoldMine]
Xmailer = Yahoo ( Use any other name here instead of GoldMine )
```