

In This Chapter

Import Leads into GoldMine

Assign a Source Code

Analyze Leads

Assign a Merge Code

Assign an Owner/Manager

Assign an Automated Process

Schedule an Activity

Organize Filters and Groups

Import Leads into GoldMine

The GoldMine Leads Management Center helps you manage your leads at different stages throughout the sales cycle. The Leads Management Center provides a set of tools that assist you in defining ownership and security rules, analyzing your leads, and more. This statement, taken from the header of GoldMine's **Leads Management Center**, pretty much says it all. This Center is basically a grouping of all of the GoldMine Tools, which can also be accessed elsewhere, that will assist you with your corporate Leads Management.

From the GoldMine menu select:

Go To
Lead Management

This will access the GoldMine's Leads Management Center, the resulting dialog form can be seen on the next page in full, Figure 15-2. Basically, this center is a combination of tools within a single GUI. Some of these access points are to previously existing tools within GoldMine, while others access totally new tools that had been requested by users for a long time. FrontRange has listened, and delivered on your requests.

I will get to each of these in turn, however, I would like to mention that some, like **Assign a Merge Code**, have been sought after for years by end users of GoldMine. I wrote an application to do just this for a client about eight years ago. It is great to see that these tools have now been incorporated into the GoldMine application.

I begin by asking you to look at Figure 15-2, next page, to see the GoldMine **Leads Management Center** which, in GoldMine Premium, has been demoted to just the **Leads** dialog form.

The first tool, **Import leads into GoldMine**, is another way to access the GoldMine Import tool which has existed, in various versions, for years. The only thing new for GoldMine Premium, when you click the hotlink Import leads, is that you get to predetermine the type of import that you will be using as shown here, Figure 15-1, in the **Select Import Type** dialog form.

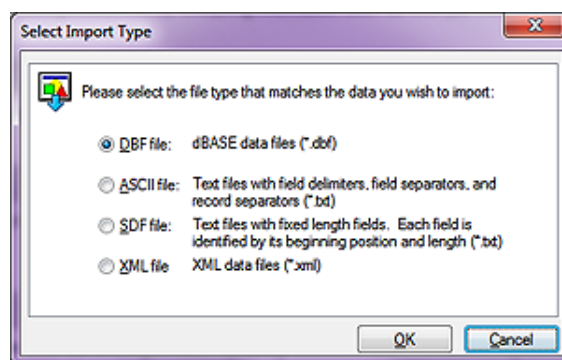


Figure 15-1

Selecting any of the first three import options will bring up the standard Import dialog form as shown ahead in Figure 15-3. Selecting the last entry, **XML File XML data files (*.xml)**, will bring up the XML import dialog form, which is different. As I will not actually be discussing the actual imports themselves, I will not be showing you any more dialog forms driven from this utility.

All that the user is required to do, is to select the data type that is to be imported, and then to click on the **OK** button. From then on, you, the user, is presented with the normal standard GoldMine Import utilities with the data type preselected.

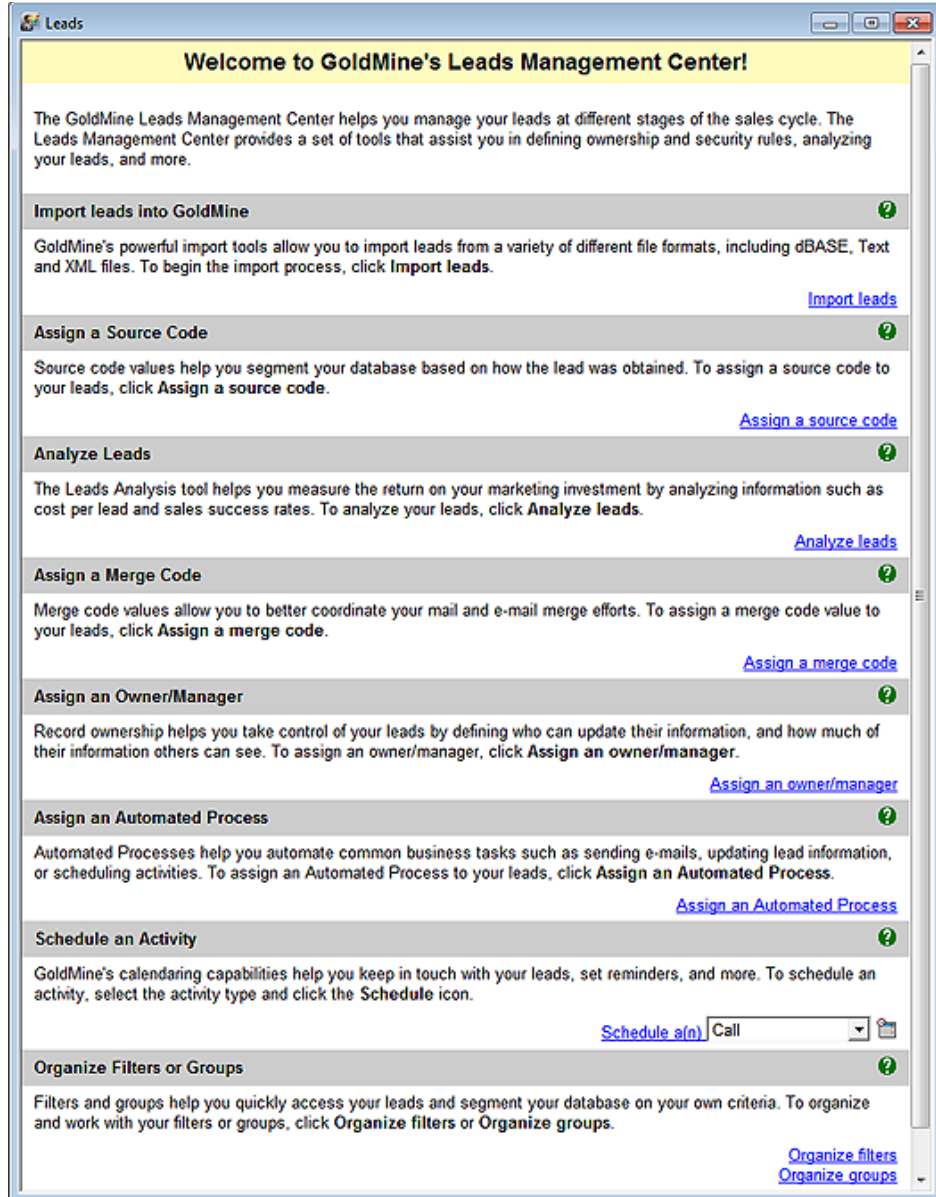


Figure 15-2

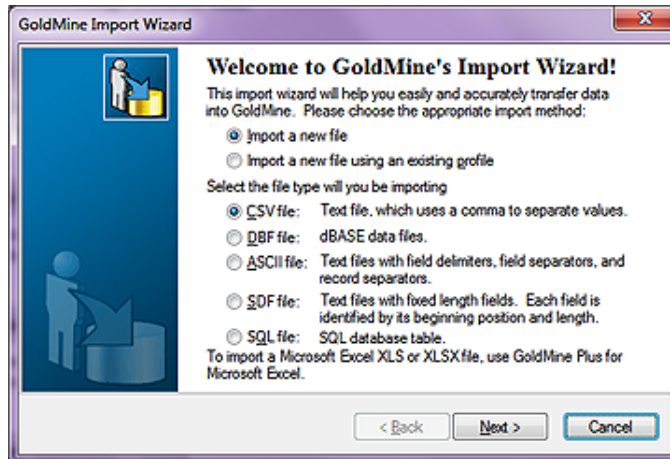


Figure 15-3

“Not a great tool.”, you say. Well, yes, and no. I like the fact that GoldMine consolidates these tools into an easily accessible area. Having said that, let’s continue on.

Assign a Source Code is a slight misnomer. The user should consider this tool as a mini **Global Replace...** Wizard, and, as with the regular **Global Replace...**, the user should always backup prior to employing this utility.

The user can easily see, Figure 15-4 on the next page, that they can employ any of the available GoldMine **Filters/Groups**. I have employed my filter called the GoldMine Premium Filter, as I, myself, may end up using the **Campaigns** tool within

Assign a Source Code

WARNING

This is a destructive utility. Before attempting to use this utility, one should always make a backup of their GoldMine. This is always the case when performing any destructive actions within your GoldMine.

Note

There are the 10 user defined fields that are not true user defined fields, **Contact2.UserDef01** thru **Contact2.UserDef10**. You will have to examine the list carefully. If a user defined field has been given a **Global Label**, it may appear in the list with the **Global Label** as well as the user defined name. On the other hand, it could simply appear in the list in alphabetical order based on the user defined field name.

Note

Did you notice that they said **Update linked fields (based on Lookup.ini)**. Fields is plural, whereas, you can only select a single field using this utility. This is a carry over (code reuse) from the **Global Replace** utility.

GoldMine. I will definitely want to send all of my current readers notification of the release of this new book.

Next is the **Update Field:** drop list box (have you noticed that there is no hot-key for this field?). Even though this utility is entitled **Assign a Source Code**, you may select any **Contact1/Contact2** field to replace, hence the previously mention misnomer. The drop list will display all of the fields in alpha order using the local labels except for any real user defined fields, which are listed by their user defined field name. The user simply has to select the field for which they wish to replace any of the existing data with the new data. Unlike the real Global Replace utility tool, you may not use expressions here. You must select a field from the provided list, and you may only do a single field per run, whereas, on a true Global Replace, you could replace multiple fields on the same run.

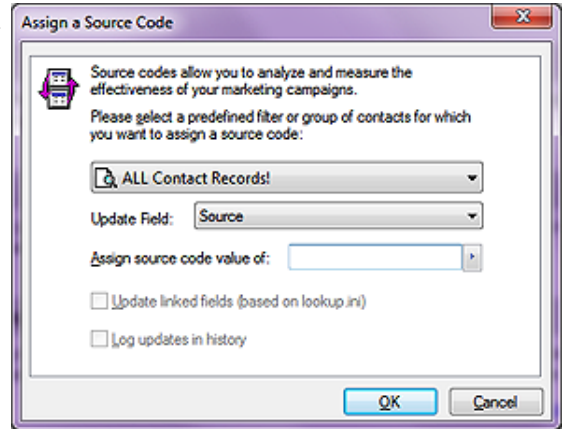


Figure 15-4

Assign source code value of: is the replacement information. Should the previously selected field have a **F2 Lookup List** then that list will be available for entry selection. Usually, as this is **Leads Management**, the entry will not pre-exist on the **F2 Lookup List**, and you will need to enter it by hand.

The next two items are grayed out by default in most cases, however, should you select to replace a field that is contained as a watch field (left hand side of the equal sign) within your **Lookup.ini**, or that has been registered to create a **History Activity**, then the appropriate option will be enabled, and available for selection. **Update linked fields (based on lookup.ini)**, and **Log updates in history** are these two options of course. Even though the field may be marked to create a History Activity, the default selection here will be to not create a History Activity, and rightly so as this is, in effect, a Global Replace.

If you have already made your backup of your GoldMine, from here it is a simple matter of clicking on the **OK** button, and the processing will proceed. I really mean that as GoldMine provides no intermediate dialog "Are you sure" question. Once you click on that **OK** button, you are committed. Shoot, it is so simple, that I think that even I would be successful in doing this easy task.

This is an important utility when used in conjunction with your Leads Management. It is very important to be able to group your leads into a manageable segment of your database. Updating a Source field is important in this process, however, have you noticed, you must be able to group the leads already in order to apply this process? This is kind of a Catch 22, however, I'm sure that you'll be able to figure other uses for this utility as well.

Analyze Leads

To **Analyze Leads** is an old utility presented to you through the **Leads Management** interface. Look here at Figure 15-5, and then Figure 15-6 on the next page. You may recognize these GUIs. Figure 15-5 is used to create the file into which the result analysis is placed, while Figure 15-6 is actually used to populate that file.

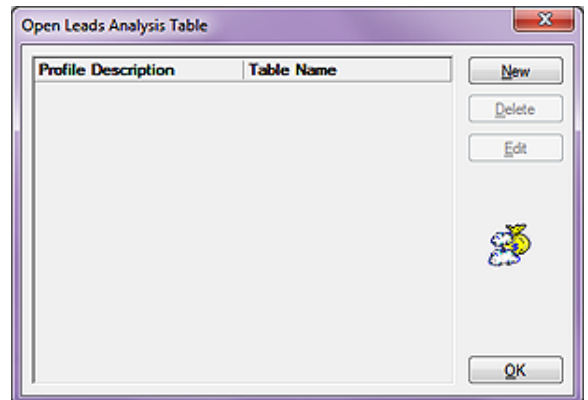


Figure 15-5

You should notice that this utility, and the last utility, go hand in hand. I can run a **Leads Analysis** against any field, while the **Assign a Source Code** lets you assign a **Source Code** to any field. It is very nice of Front-

Range to group these sequential utilities into an easily accessed location. I won't actually discuss the **Leads Analysis** dialog form, as it has been around for a long time now. When you click on the **Analyze** button as shown in Figure 15-6 on the next page, you will be presented with a dialog form from which you may choose your field to analyze against, as well as a date range to analyze within.

Assign a MergeCode

WARNING

As of this writing, this utility is a **re-placement** (overwrite) utility. Using this utility will replace everything in the **Contact1.MergeCodes/ContSupp.MergeCodes** field with whatever value you enter. I have requested, from FrontRange, that they change this to an append utility, or allow the use of dBase functions.

Where this is a destructive procedure, it would benefit you to have a SQL Backup of your GoldMine Premium Database before your begin this procedure.

Note

I would like to reiterate that a mail merge code pertains solely to **Word Document Merges**, while an e-mail merge code pertains solely to **Internet E-mail Merges**.

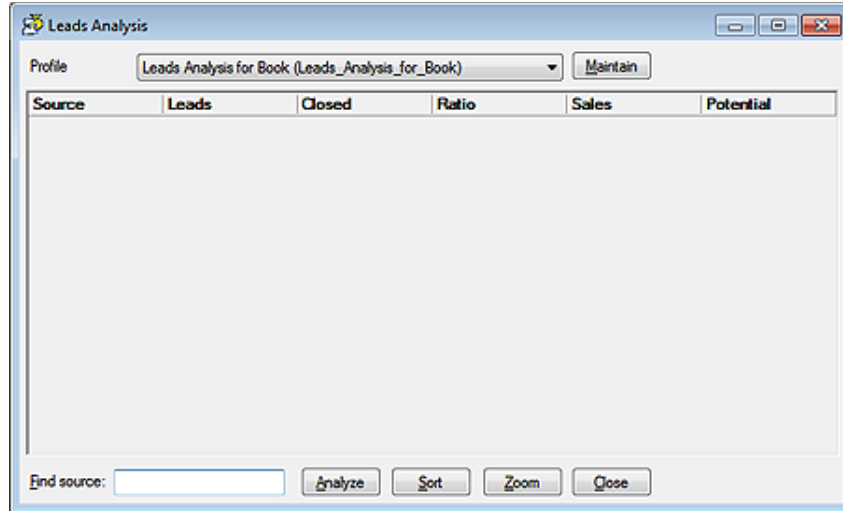


Figure 15-6

Well here is a long awaited for, and often requested utility as GoldMine states it: *"Merge code values allow you to better coordinate your mail and e-mail merge efforts. To assign a merge code value to your leads, click Assign a merge code."*

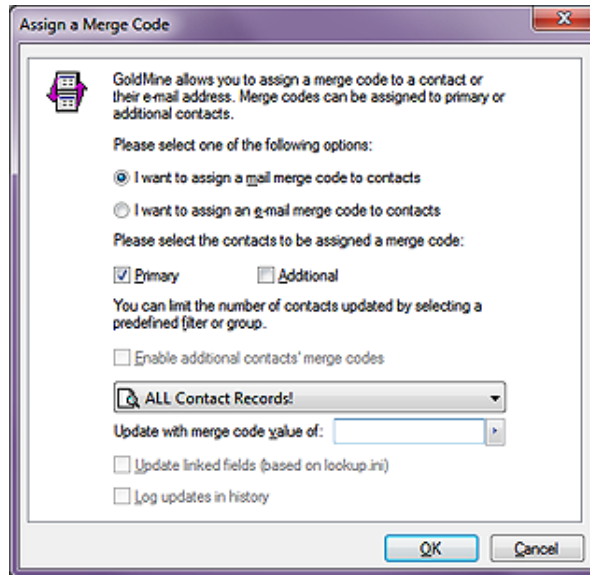


Figure 15-7

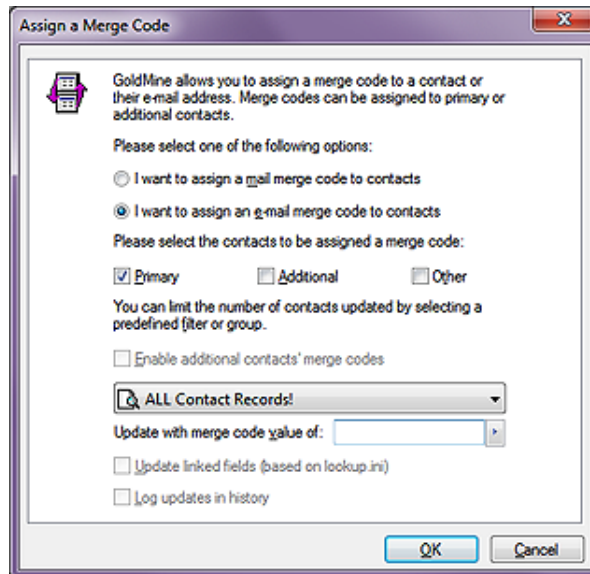


Figure 15-8

and that's a fact Jack. Individuals have a hard time comprehending that there are two separate fields for **MergeCodes**, and that each is employed independently of the other. Everyone sees the **Merge:** field on the primary GoldMine screen, and usually enters a code there while not realizing that this merge code field is for document merges for the primary contact only at least within the default GoldMine practices. It has absolutely nothing at all to do with **E-mail MergeCodes**. Unless they access the **ContSupp** table (display the E-mail Addresses by clicking on the E-mail Address from the primary GoldMine screen), they never see that there is a separate, and distinct, **Merge codes:** field for the e-mail addresses (each E-mail Address listed has its own **MergeCodes** field). Additionally, each secondary contact, under the **Additional Contacts** tab, has its own document **Contact1.MergeCodes**, and E-mail Address **ContSupp.MergeCodes** field. Wow! Now I know why individuals can easily become confused. I think I just confused myself.

In simple terms, there is a **MergeCodes** field for documents for each Primary, and Secondary Contact in GoldMine. There is a **MergeCodes** field for each individual E-mail Address within GoldMine. This utility allows you to overwrite the **MergeCodes** fields any where they exist. The key words in that statement being "overwrite the **MergeCodes** fields".

Assign an Owner/Manager

You have two option selections on this dialog form that determines how the dialog forms look, and feel. The default option is **I want to assign a mail merge code to contacts**, and Figure 15-7 on the previous page depicts this dialog form. If, however, the user were to select **I want to assign an e-mail merge code to contacts**, then Figure 15-8 on the previous page depicts the respective resulting dialog form. One can easily see that the only difference between the two dialog forms is an additional option, **Other** for when one selects the E-mail Address selection option. This is because the primary Contacts may have additional E-mail Addresses. They are not limited to one Primary E-mail Address, and you may wish to assign a merge code to each of the E-mail Addresses. On the other hand, the secondary Contacts may only have a single E-mail Address each.

I will discuss the non default dialog form selection, as shown in Figure 15-8, as this is the feature that was lacking before the introduction of GoldMine Premium. Next you must choose among the options presented to select the contacts to be assigned a merge code. By default the **Primary** is selected, and you, the user, may, in addition, select **Additional** and/or **Other** (remember the **Other** option will not be available for the document (mail) merge code).

Next *"You can limit the number of contacts updated by selecting a predefined filter or group"*. There is a drop list available from which one may select the filter/group that they wish to apply this replacement against. This is good if you have a Filter/Group created for this lead group. You may have noticed a grayed out option **Enable additional contacts' merge code**. Additional or Secondary Contacts have a flag preceding the **Merge:** field which enables or disables the **ContSupp.Merge-Codes** field for this particular secondary contact. If you have selected **Additional** on Figure 15-7, this option will be enabled, and you should then select the option. In fact, I am not sure why this is not selected when enabled as a default. I should mention that the Filter/Group drop list acts as all similar list throughout GoldMine. If you have a Filter/Group Active, then the list will default to **Active Contact Filter**, otherwise, it will default to **All Contact Records!**. You may also select any Filter/Group available to you from the drop list.

Now we come to **Update with merge code value of:** and a click on the F2 Lookup List button will bring up the F2 Lookup List for the selected merge code field. Alternatively, you can just type in the replacement merge code value, remembering that this will replace any existing merge code information for the selected records. This is not, as it implies, an update for the field. It is, in fact, an overwrite procedure.

The next two items are grayed out by default, however, should you select to replace a field that is contained in your watched **Lookup.ini** fields, or that has been registered to create a **History Activity**, then the appropriate option will be enabled, and available for your selection. **Update linked fields (based on lookup.ini)**, and **Log updates in history** are the two options. Even though the field may be marked to create a History Activity, the default selection here is to not create a History Activity.

I'm pretty sure that you know to click the **OK** button next.

Most organizations will **Assign an Owner/Manager** to take control of a new lead or group of leads to assure that none falls through the cracks, and all process appropriately for their organization. As FrontRange states it: *"Record ownership helps you take control of your leads by defining who can update their information, and how much of their information others can see."*

This process itself is quite simple, and again, you would like to activate a Filter/Group to which you may **Assign an Owner/Manager**. In the first section of Figure 15-9, I used my sample filter: **GoldMine Premium Users**. Even though these are not new leads, when next I look at the GoldMine **Campaign Management Center**, I will want to try an up sell this group to **GoldMine Premium - The Definitive Guide**. Who knows, you may be in this category, and have already become part of this marketing example.

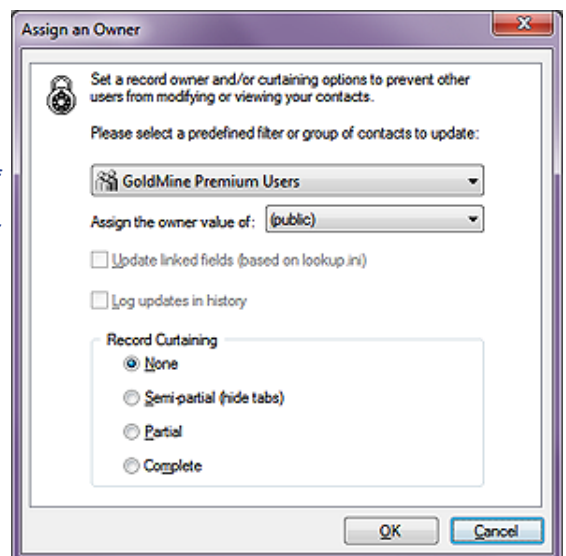


Figure 15-9

Next, it is assumed that you have already defined your **User Groups**, and are capable of selecting the appropriate **Group/UserID** from the list of those available under the **Assign the owner value of:**.

Again, this is a drop list, and not a combo list. You may only select from, and you may not type into it (if you type, the list just advances to a matching item if one is available).

And next we see our two friends again. These two items are grayed out by default, however, should you select to replace a field that is contained in your watched Lookup.ini fields, or that has been registered to create a History Activity, then the appropriate option will be enabled and available for selection. **Update linked fields (based on lookup.ini)**, and **Log updates in history** are the two options. Even though the field may be marked to create a History Activity, the default selection here is to not create a History Activity. Boy, where have we heard that one before?

And, lastly, there is the **Record Curtaining** frame. These are, as always, radio button selections (only one can be selected). Your options are:

- N**one
- S**emi-partial (hide tabs)
- P**artial
- C**omplete

For those of you who don't remember from Chapter 9 - The Tables, the values represented are:

- 0 = None (legacy)
- 1 = Partial (legacy)
- 2 = Full (legacy)
- 3 = Semi-Partial (recent GoldMine versions)

Those values are stored in the 2nd bit of the **Contact1.Status** field while the Owner/Manager Owner Group/UserID are stored in the **Contact1.Owner** field.

And that pretty much finishes it for this dialog form. Simply click on the **OK** button to proceed with the replacement.

Assign an Automated Process

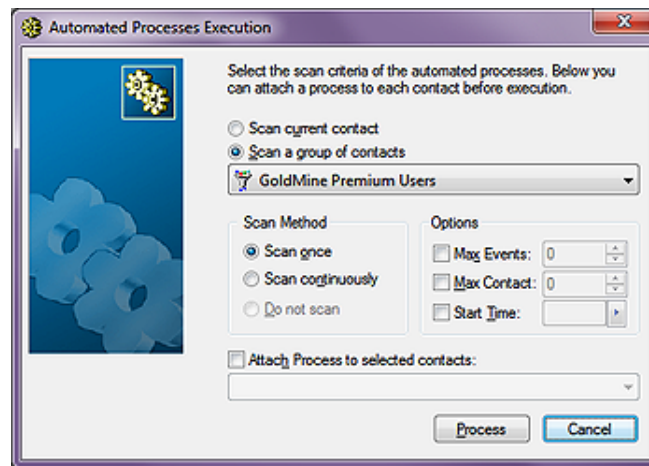


Figure 15-10

checked, all available Automated Processes will be available in the drop list from which you may choose the appropriate new leads process to be assigned to the campaign group.

Again, we have an old tool presented to you via a different GUI. There is very little to discuss here, however, for those that have never done this, I would like to say that you must first have your **Automated Process** defined. Further, as you can see, I will be applying it against my default filter, **GoldMine Premium Users** in keeping with the spirit of the campaign. What you don't see here, in Figure 15-10, is that I have yet to check the option **Attach Track to selected contacts:**, and this must be done before the **Process** button is clicked upon. Once

Schedule an Activity

Again, we have an old tool presented to us via a different GUI, and as before this interface should be no challenge to the long time GoldMine user. You may have noticed, Figure 15-2, that you could select the **Activity Type** directly from the **Lead Management Center** dialog form. For Instance: Figure 15-11 on the next page shows that I had selected to **Schedule a(n) Next Action**, as the **Schedule a Next Action** dialog form was driven from the Leads Management Center dialog form.

You would complete the **Detail** tab dialog form, and then click on the **Search** button to the right of the **Link to selected Contact:** field and choose **Select Filter or Group...** to continue the process of scheduling for your specific lead campaign group.

Organize Filters or Groups

This is another GoldMine faux pas, as far as I am concerned. This is a good tool to have in this the **Leads Management Center**, but wouldn't you have thought, since we have used **Filters/Groups** in every tool so far, that this would have been the first item in the **Leads Management Center**? Especially where the FrontRange developers didn't even follow an alphabetized presentation of these tools for the user.

Oh well, everyone has their own opinions as to User Friendliness when it comes to application design.

As FrontRange states: *"Filters and groups help you quickly access your leads and segment your database on your own criteria. To organize and work with your filters or groups, click Organize filters or Organize groups."*, and I recommend that you try to establish a filter or a group as your first step in this whole Leads Management process. Much as I had done by pre creating the filter: **GoldMine Premium Users**.

As this selection only brings you to the **Filters and Groups** dialog form, and having already discussed these in detail in **Figure 15-11** Chapter 7 - Gathering the Data, I do not feel a need to discuss these any further in this chapter.

This, then, concludes this chapter on the **Leads Management Center**.

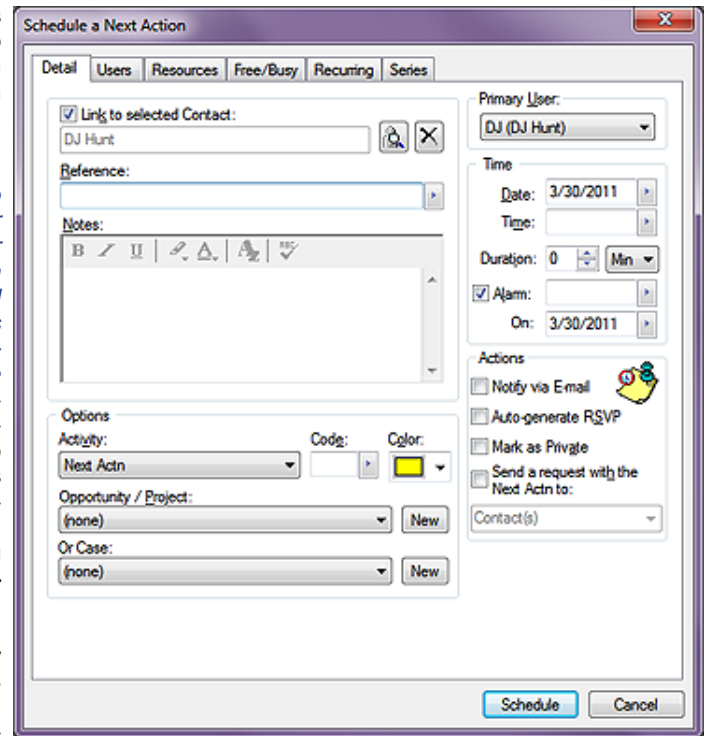


Figure 15-11

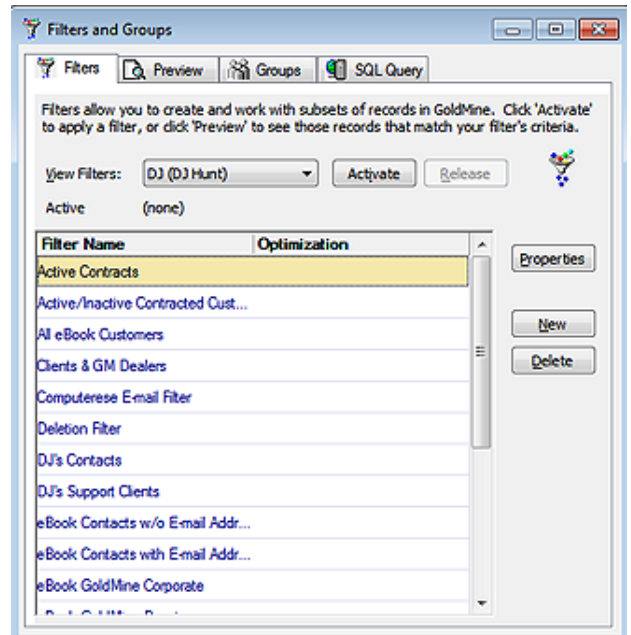


Figure 15-12

