

PLEASE READ THIS FIRST

GoldMine® 6.7/GoldMine® 6.7 Corporate Edition, Manual Addendum and Errata. ©2004 FrontRange Solutions Inc.

Last updated on February 18, 2005.

Welcome to GoldMine 6.7/GoldMine 6.7 Corporate Edition for Windows 98/ME/2000/XP/2003!

The following document includes corrections to the GoldMine 6.7 documentation and supplemental information not available when the documentation was printed. Please keep this document in a safe place and use it in conjunction with the GoldMine 6.7 documentation.

1. If you are installing on a system using Windows 2000/XP or 2003, you will need to login to Windows using an account that has local system administrator level privileges before initiating the install process. You will not be able to install GoldMine if you do not have sufficient Windows privileges.

2. If you are installing GoldMine 6.7 on a Network, print out and read the information in the Installing GoldMine 6.7.PDF file before continuing. You will need this information to properly complete the installation. A copy of the file can be downloaded at the following location:

<<http://support.frontrange.com/attachments/manuals/GoldMine/6/index.html> >

3. If you are installing on a system using an older version of Microsoft Internet Explorer (IE), you must update to version 6.0 or higher. GoldMine 6.7 requires IE 6.0 for HTML based functionality. You should also apply all available security patches for IE 6.0. You can install IE 6.0 by downloading the necessary install files from the Microsoft website, located at <<http://www.microsoft.com>>

Security patches can be downloaded and installed by selecting Start>>Windows Update or Start>>All Programs>>Windows Update, depending on your version of Windows.

4. If you are using Windows 98, including SE, or Windows Me, you will not be able to access the integrated VoIP based SoftPhone. You may only use the integrated SoftPhone on systems running Windows 2000 or higher.

5. If you are installing on a system using Windows NT 4.0 (All Versions), please note that NT 4.0 is no longer supported by FrontRange Solutions and can cause problems. Do not attempt to run GoldMine 6.7 on an NT 4.0 system. It is possible to use an NT 4.0 system as a file server for GoldMine 6.7, however, FrontRange Solutions strongly recommends against this.

6. If you are installing on a Windows 2003 Server, you must first install locally (to a local drive of the server). Configure your GoldMine server for network user access after the local installation process completes.

7. If you are installing GoldMine Corporate Edition and intend to perform a Server installation to share your database, please verify that you have installed the Microsoft SQL Server Client Tools prior to initiating the GoldMine installation process.

8. It is recommended that you configure your anti-virus software to exclude the scanning of files with an extension of DBF, DBT or MDX. Scanning such files may affect the performance of GoldMine and/or GoldSync.

9. If you are upgrading from GoldMine 4.0, please note that certain new features of GoldMine 6.7 will not be accessible if you use the GoldMine 4.0 menu layout. To verify that you are using the GoldMine 6.7 menu layout, select Edit>>Preferences>>Misc within GoldMine 6.7 and verify that the Use the old GoldMine 4.0 menu option is unchecked.

10. If you are upgrading from GoldMine 5.5 or lower, please contact our Customer

Care team at 1.800.776.7889 for further assistance.

11. If you are using Windows 9x on the workstations and need to use the AnswerWizard reports, you will need to copy the unicows.dll from the Management Intelligence directory in the network GoldMine install, into the Management Intelligence directory on the workstation. Locate the CR9Deploy.reg file in the workstation Management Intelligence directory, and use notepad to edit it to point to the location of the workstation Management Intelligence folder using the instructions outlined in point 12 of this document. After saving the edits, double-click on the file to merge it into the registry.

12. If you are running custom Crystal reports through GoldMine's Reports Menu and the workstation does not have Management Intelligence or Crystal Reports installed, please follow the steps below:

Note: Crystal Decisions provides a variety of methods to deliver custom reports. FrontRange Solutions, Inc. recommends that you consult with your report developer regarding which method would work best for your organization.

- Locate the Crystal9Files.zip file found in the Drivers and Downloads section of the Support Services Web Site (<<http://support.frontrange.com>>)

- After the .zip file is extracted, locate the CR9deploy.reg file in the GoldMine directory. Right-click this file and select Edit to open it. After it is open, modify the single entry so that the path is pointing to the same directory in which gmw6.exe and the recently extracted files are located. For example, change:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Crystal Decisions\9.0\Crystal Reports]
"CommonFiles"="c:\program files\common files\crystal decisions\2.0\bin"
```

To:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Crystal Decisions\9.0\Crystal Reports]
"CommonFiles"="c:\program files\goldmine"
```

Please note, the double slash format (\\) is essential.

- When done modifying this entry in the CR9deploy.reg file, save it and then execute the change by double-clicking the file. Select Yes to accept the changes to the Registry.

- Then, from the Windows Taskbar go to Start>>Run and enter the command below:

```
regsvr32 "<drive and folder path>\crqe.dll"
```

- When the drive and folder path are share the same the location as the gmw6.exe file and the Crystal 9 files extracted earlier, click OK to register the crqe.dll file.

Crystal Reports will now be an option in the GoldMine Reports Center. Please be certain to set ODBC sources for Crystal in the GoldMine Report Menu by right-clicking and accessing the local menu.

Lastly, please note that the extracted Crystal 9 files enable basic Crystal Reporting functionality only. If a Crystal report makes use of custom crystal functions, graphs, etc., or there is a need to export the results of the report to different formats, then those files will need to be supplied by the developer of the report.

13. If you are upgrading from a version of GoldMine using a D-type license (dBASE database) to GoldMine Corporate Edition, and plan on using MS-SQL databases, you will need to manually re-host the data to the MS-SQL server after the upgrade

process finishes. On Windows XP systems, you will need to start the re-host wizard manually by logging into GoldMine 6.7 and selecting File>>New Database.

14. If you are using a version of GoldMine that is integrated with third-party solutions or you are using other applications that access the Borland Database Engine (BDE) on the same system as GoldMine, it is recommended that these services and/or applications be stopped and/or closed before installing GoldMine; or you may encounter BDE errors such as the following:

1. GoldMine cannot dynamically load functions from IDAPI32.DLL. Please re-install the Borland Database Engine (BDE).
2. BDE Error 9473
3. BDE Error 8461

Applications may also appear to stop responding or close unexpectedly. In many cases, adjusting the SHAREDMEMLOCATION setting in BDE will correct the problem. Some parameters to try for this setting are: 7F00, 6BDE, and 5BDE. It may also be necessary to increase the physical amount of memory installed on the system.

15. If you are migrating data from an ACT!® 5.0/2000 or lower, use the automated ACT! import wizard, accessible via Tools>>Import/Export Wizard>>Import Contact Records. Select Import a new file using an existing profile and DBF for the file format.

ACT! 6.0 conversions should be performed by selecting Tools>>Import/Export Wizard>>Convert from ACT! 6.0...

ACT! 2005 conversions are currently unsupported.

16. For information about new features of GoldMine 6.7, please see the What's New in GoldMine 6.7.PDF file located at:

<<http://support.frontrange.com/attachments/manuals/GoldMine/6/index.html> >

17. If you are upgrading from a previous version of GoldMine, you should understand that after upgrading, you would no longer be able to use this system with any prior version of GoldMine. GoldMine 6.7's databases are NOT backward compatible with any GoldMine 5.x, 4.x, 3.x, 2.x, or 1.x systems.

NOTE: It is highly recommended that you back up your data before upgrading.

18. If you are a remote user synchronizing with another GoldMine system (including via GoldSyncä), you must synchronize your data to the central GoldMine system first and upgrade your central GoldMine installation before converting your remote GoldMine System.

IMPORTANT: Systems upgraded to GoldMine 6.7 will NOT synchronize with any GoldMine 6.6, 6.5, 6.0, 5.x, 4.x, 3.x, 2.x, 1.x or GoldSync 6.6, 6.5, 6.0, 5.x, 4.x, 1.x systems.

19. If you are using the Modem or Network synchronization method (including via GoldSync), please note that after upgrading, you will no longer be able to use either of these methods. In their place, you will need to use the IP to IP/Network, E-mail or Shared Folder synchronization methods.

20. If you synchronize linked documents, and are planning on synchronizing using the GoldSync Service, you must configure the GoldSync Service to login using a domain username/password with access to the network/drive locations used to store the linked files.

21. If you synchronize linked documents, and are planning on synchronizing using the GoldSync Service, please note that the synchronization process will NOT include linked files referenced by mapped drive designations. Logging on to the system

using a domain username/password with access to the mapped drives used to store the linked files will permit the GoldSync Service to include these linked documents.

22. If you will be synchronizing GoldMine with a Palm OS PDA or smartphone, you will need to have Palm Desktop Software 4.0, or higher, installed on your system and the HotSync utility must be running. You can install Palm Desktop Software 4.x by downloading the necessary install files from the PalmOne website, located at <<http://www.palmone.com/us/software/desktop/>>

23. If you will be synchronizing GoldMine with a Palm OS PDA or smartphone, you should verify that your Palm device is able to successfully synchronize with the Palm Desktop Software prior to attempting to synchronize with GoldMine.

24. It is strongly recommended that you use Windows Explorer to copy the gm6setup.exe installation file from its current location to the \GoldMine\Setup\GoldMine folder after the installation process completes. This file is necessary for the Undocked Installer and Install Locally features of GoldMine.

25. If you have previously used the Install Locally option to install GoldMine, please note that you will need to manually upgrade these installations using the Install Locally option, after copying the GoldMine 6.7 install file to the \GoldMine\Setup\GoldMine folder, per item 24 above.

26. If you are upgrading from GoldMine 4.0 or higher and are using field-level security, please note that after upgrading, you must assign a label to the field before you can change its security setting. To hide the label, select the Color tab on the Field Properties window and enter the value of -2 in the Expression field.

27. To integrate Internet-based content within the GM+View tab of GoldMine 6.7, FrontRange Solutions recommends using JavaScript, ActiveX objects, or other similar methods.

IMPORTANT: It is strongly advised that you do not use the IFRAMES or FRAMES/FRAMESET HTML tags.

28. If you would like to use the WebImport deployment tool, you will need to connect to the Internet before launching the tool. To access the WebImport deployment tool, select File>>Configure>>WebImport.

29. If you are using Universal Naming Convention (UNC) designations to connect workstations to your GoldMine server and share data, please note that you may receive errors when opening the My GoldMine window on the workstations. To correct this, convert the UNC designations to mapped drive letters.

30. If you exchange iCalendar (iCAL) messages with Outlook 2000/2002(XP)/2003 users, please note that Outlook handles iCAL messages best when configured to use Internet Mode and POP3 account(s).

Using Workgroup Mode, or configuring Outlook to send/receive messages from a Microsoft Exchange Server only, may result in lost Activity details on replies sent by the Outlook recipient or difficulties in the handling of replies to activities sent by Outlook users.

IMPORTANT: Differences in the handling of recurring activities may present problems when using iCAL messages. If exchanging recurring activities with an Outlook client using iCAL messages, do not make changes to the activities once they have been accepted.

31. If you receive meeting requests from Outlook 2000/2002(XP)/2003 users, please note that GoldMine is not able to read Outlook meeting requests for recurring activities that do not include an end date.

32. If you install the GoldMine Link for Word and are using

Word2000/2002(XP)/2003, verify that you have set the Macro Security level in Word to Medium or Low and that Word is not running at installation time. You can check your current setting by launching your copy of Word and selecting Tools>>Macro>>Security.

33. If you install or use the GoldMine Link for Excel, you should be aware that it is not compatible with Windows XP Service Pack 2 (SP2). You will experience BDE errors on those systems when attempting to use the link. A future version of the GoldMine Link for Excel will correct this issue.

34. If you use GoldMine's e-mail templates, please note that you cannot enable the Wrap Lines option to toggle it on/off.

35. If you plan on using GoldMine's SMS/Text messaging capabilities, please be aware that the recipient's mobile service provider must support the ability to receive SMS/Text messages via e-mail.

36. If you plan on using GoldMine's SMS/Text messaging capabilities, please be aware that some mobile service providers require that the subscriber enable mobile e-mail for their account prior to them being able to receive messages on their mobile device.

37. You can receive FREE technical support online by pointing your web browser to <<http://support.frontrange.com/freesupport/>>

Thank you for choosing GoldMine 6.7/GoldMine 6.7 Corporate Edition!