

GoldMine Integration Services for Microsoft Outlook

Standard Edition

10/05
SKU#

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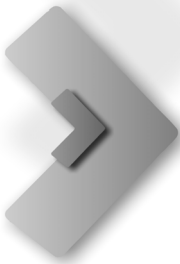


Table of Contents

Introduction

Welcome to GoldMine Integration Services for	
Microsoft Outlook	iixiii
About this Guide	iixiv
Audience and Expertise	iixiv
Document Conventions	iixiv
Resources	iixv
Contact Us	iixv

Installing GoldMine Integration Services for Microsoft Outlook

Overview	1-1
System Requirements	1-2
Installing GoldMine Integration Services for	
Microsoft Outlook	1-2
Licensing GoldMine Integration Services for	
Microsoft Outlook	1-8
Uninstalling GoldMine Integration Services for	
Microsoft Outlook	1-9

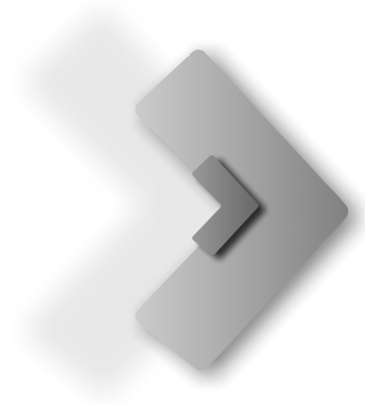
Configuring GoldMine Integration Services for Microsoft Outlook

Overview	2-1
Configuring GoldMine Integration Services for Microsoft Outlook	2-2
Adding GoldMine Fields to Outlook	2-5
Configuring the GoldMine Address Book	2-7
Displaying Information about GoldMine Integration Services	2-9

Using GoldMine Integration Services for Microsoft Outlook

Overview	3-1
Using the GoldMine Integration Services Toolbar	3-2
Linking Messages to GoldMine Contacts	3-3
Using the GoldMine Address Book in Outlook	3-4

Index



Introduction

Welcome to GoldMine Integration Services for Microsoft Outlook

By integrating Microsoft Outlook and GoldMine functionality, GoldMine Integration Services for Microsoft Outlook promotes flexibility and the sharing of cross-purpose data. GoldMine Integration Services for Microsoft Outlook allows you to launch the GoldMine Contact Record while working in Outlook, manually or automatically link Outlook messages to existing GoldMine contacts, and quickly create a new GoldMine contact and link e-mail.

Outlook users can also access a GoldMine Address book of Users, Contacts, Additional Contacts, User Group Distribution Lists, and Contact Group Distribution Lists.



About this Guide

GoldMine Integration Services for Microsoft Outlook Getting Started Guide describes how to install and configure GoldMine Integration Services for Microsoft Outlook.


Audience and Expertise

The material assumes the GoldMine administrator has already installed and is familiar with GoldMine and Microsoft Outlook. It also assumes the user has a basic understanding of databases and the Microsoft Windows operating system.

Document Conventions

Example	Description
File>>Print	Menu bar commands (in this example, select File on the menu bar, then select Print in the drop-down menu)
The Select a Data Source dialog box appears.	Dialog boxes and menu items in bold
OK 	Button names
Note	Additional information
CAUTION/WARNING	Critical information to prevent functionality or data loss
	Reference to another topic or resource

Resources

 Manuals are available in PDF format from the Installation CD-ROM or NetUpdate download or from **support.fronrange.com** for maintenance customers.

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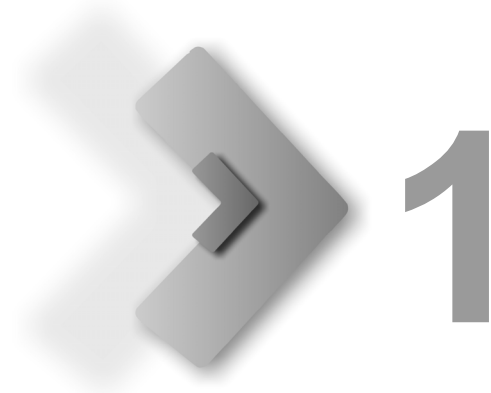
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Installing GoldMine Integration Services for Microsoft Outlook

Overview

Installing GoldMine Integration Services for Microsoft Outlook consists of running the installation wizard, and then configuring the link between applications. If you are using GoldMine (Corporate Edition), GoldMine Integration Services for Microsoft Outlook is included on your Corporate Edition CD. If you are using GoldMine (Standard Edition), install GoldMine Integration Services for Microsoft Outlook by accessing the URL indicated in your GoldMine Integration Services for Microsoft Outlook fulfillment letter.

System Requirements

To install GoldMine Integration Services for Microsoft Outlook, you must meet the following software requirements:

- **GoldMine:** GoldMine Corporate Edition version 6.5 to 6.7.

IMPORTANT: GoldMine D-license users must have the latest GoldMine 6.5 patch installed. This patch is available through NetUpdate or at the FrontRange Solutions GoldMine download site.

- **Outlook:** Microsoft Outlook 2000 SR-1 (9.0.0.3821), Microsoft Outlook 2002 (XP), or Microsoft Outlook 2003.

Installing GoldMine Integration Services for Microsoft Outlook

Install GoldMine Integration Services for Microsoft Outlook on each computer you want to integrate GoldMine with Outlook. To integrate, the computer must be running GoldMine and a local installation of Outlook.

To Install GoldMine Integration Services for Microsoft Outlook

1. Locate the installation setup wizard based on your edition of GoldMine:
 - **GoldMine (Corporate Edition):** Browse to the **GoldMineLinkForOutlook** folder on the GoldMine Installation CD. Double-click **GMLinkforOutlook.exe**.
 - **GoldMine (Standard Edition):** Access the URL indicated in your GoldMine Integration Services for Microsoft Outlook fulfillment letter, and follow the download instructions. When the Installation wizard opens, follow the instructions beginning on the next page.

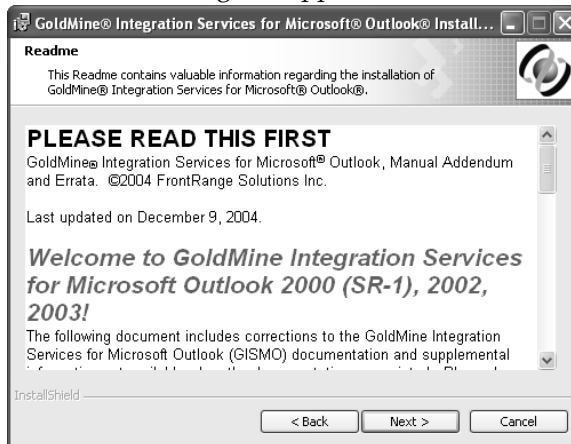
Note: GoldMine Standard Edition was previously known as GoldMine Business Contact Manager.

The **Welcome to the InstallShield Wizard for GoldMine Integration Services for Microsoft Outlook** appears.



2. Click **Next**.

The **Readme** dialog box appears.



3. Click **Next**.

The **License Agreement** dialog box appears.



4. Review the license information carefully, and if you agree to the terms select **I accept the terms in the license agreement**.

Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms in the license agreement**. Click **Cancel** to terminate the installation.

5. Click **Next**.

The **Destination Folder** dialog box appears.



6. This dialog box shows default paths and allows you to select alternative locations for the following:

- **GoldMine Integration Services for Microsoft Outlook:** Installs the link application to the displayed location. To change the path, click **Change**, and type or browse to the location where you want to install GoldMine Integration Services for Microsoft Outlook.
- **GoldMine Folder:** Reflects the path where GoldMine is currently installed. If GoldMine is not installed to this location, select a different path by clicking **Browse** and typing or browsing to the current installation location of the GoldMine you are using.

Note: If you are installing GoldMine Integration Services for Microsoft Outlook on a client workstation, browse to the network installation of GoldMine, not the local GoldMine folder containing only Management Intelligence files.

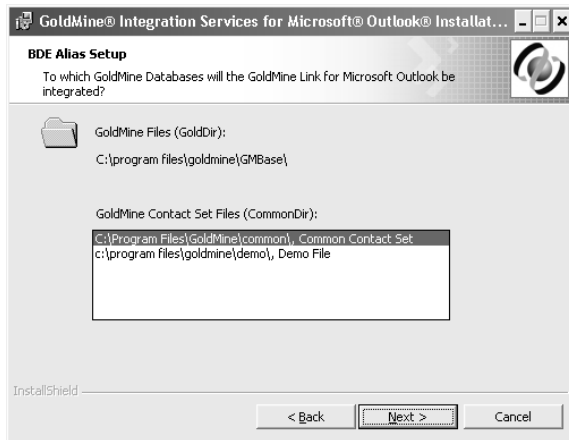
7. Click **Next**.

The **GoldMine and SQL Database Login** dialog box appears.



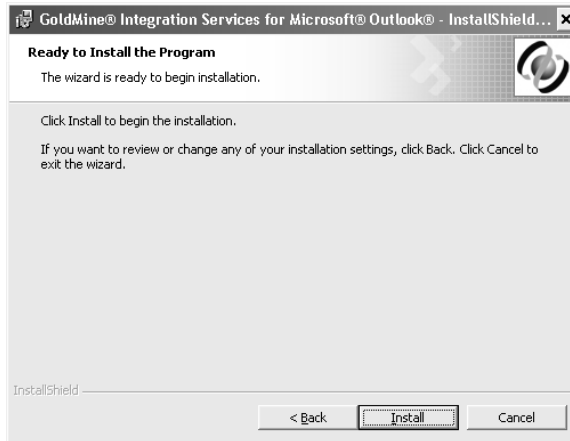
8. Type your GoldMine user name and password, and click **Next**.

The **BDE Alias Setup** dialog box appears.



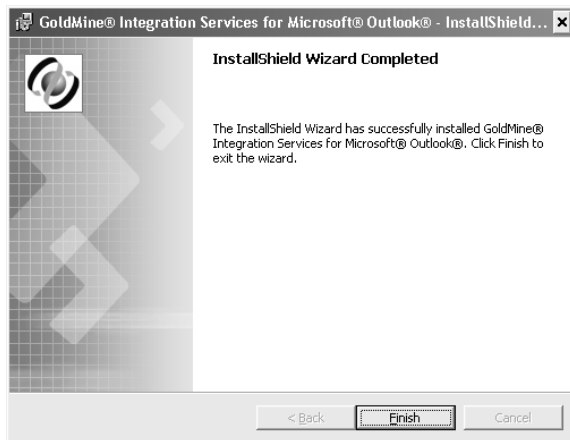
9. Select the contact database you are linking to your Outlook.
Click **Next**.

The **Ready to Install the Program** dialog box appears.



10. Click **Install** to begin installing GoldMine Integration Services for Microsoft Outlook.

The **InstallShield Wizard Completed** dialog box appears when the process is finished.



11. Click **Finish** to exit the wizard. You are prompted to restart your computer now or later; you must restart before you can use GoldMine Integration Services for Microsoft Outlook.

Licensing GoldMine Integration Services for Microsoft Outlook

Once you have installed GoldMine Integration Services for Microsoft Outlook, license the new application to access its functionality.

IMPORTANT: Licensing is only required for GoldMine BCM users. GoldMine Integration Services for Microsoft Outlook does not need to be licensed for GoldMine CE users except for CE installations with an unlimited user/site license.

To License GoldMine Integration Services for Microsoft Outlook

1. Launch GoldMine, and select **File>>Configure>> License Manager**. The **GoldMine License Manager** dialog box appears.
2. Click **New License**. The **GoldMine License Upgrade** dialog box appears.
3. Read the license information carefully, and if you agree to the terms, click **I AGREE**. The second **GoldMine License Upgrade** dialog box appears.
4. Type your GoldMine Integration Services for Microsoft Outlook serial number and key code.

Note: GoldMine Integration Services for Microsoft Outlook uses an O-license.

5. To automatically register your GoldMine Integration Services for Microsoft Outlook license, select **Automatically register**.

6. Click **OK**. When the license code is accepted, the application's functionality becomes available.

After licensing, launch Outlook. You should see the following:

- A **Welcome to the GoldMine Integration Services for Microsoft Outlook** e-mail message in your Outlook account.
- A GoldMine menu option.
- A GoldMine toolbar.

CONGRATULATIONS! You have successfully installed and licensed GoldMine Integration Services for Microsoft Outlook. Next, configure the application to use the linking and addressing options.

Uninstalling GoldMine Integration Services for Microsoft Outlook

1. From the Start menu, select Settings>>Control Panel>>Add or Remove Programs.
2. Select GoldMine Integration Services for Microsoft Outlook.
3. Click Change/Remove.



Configuring GoldMine Integration Services for Microsoft Outlook

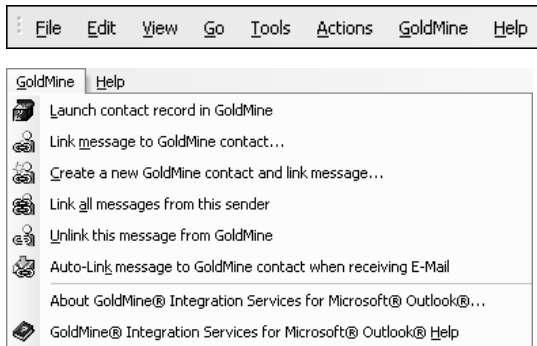
Overview

After installing, configure GoldMine Integration Services for Microsoft Outlook to define specific settings and options for the link. Configuration includes setting up the address book, changing user names, passwords, or paths defined during installation, and adding GoldMine fields to the Outlook display in GoldMine.

Configuring GoldMine Integration Services for Microsoft Outlook

GoldMine Integration Services for Microsoft Outlook installs a GoldMine menu option and a GoldMine toolbar in Outlook. To enable advanced linking features and to ensure the link functions correctly, configure the GoldMine Integration Services for Microsoft Outlook settings.

GoldMine Menu Option on Outlook Menu Bar

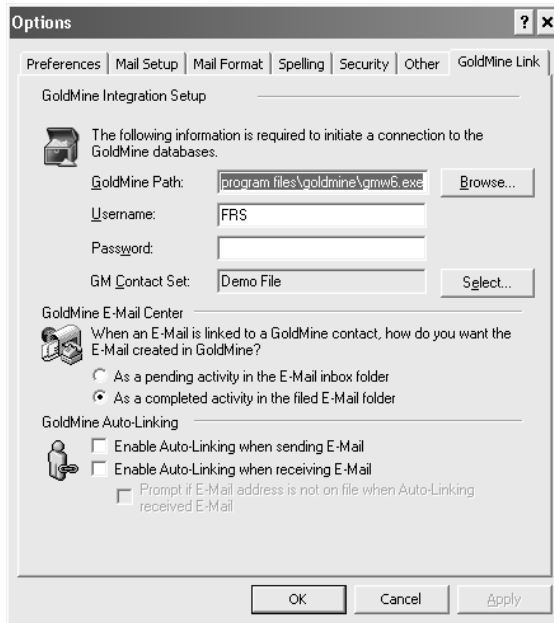


GoldMine Toolbar in Outlook



To Configure GoldMine Integration Services for Microsoft Outlook

1. From the Outlook menu bar, select **Tools>> Options**. Select the **GoldMine Link** tab.



2. Ensure the **GoldMine Integration Setup** area shows the correct GoldMine executable path; for example, **C:\Program Files\GoldMine\gmw6.exe**.
If it does not show the correct executable path, click **Browse** or type the correct path.
3. If you need to change GoldMine login information, type the new **Username** and **Password**.
4. To change the **GM Contact Set** linked to Outlook, click **Select**. In the **Contact Data** dialog box, select the correct database name.

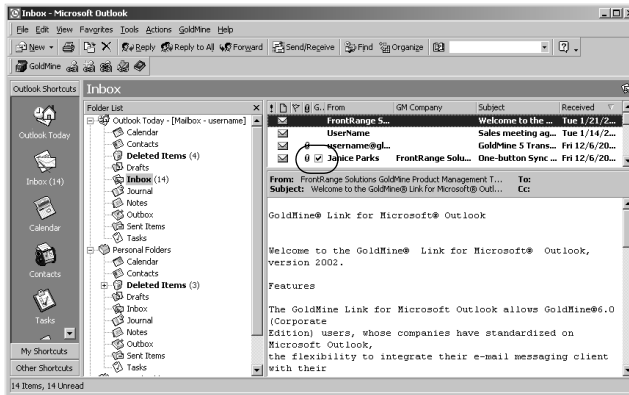
5. In the **GoldMine E-mail Center** area, you can choose to create linked e-mail messages as one of the following:
 - As a pending activity in the E-mail inbox folder
 - As a completed activity in the filed E-mail folder
6. To automatically link messages sent in Outlook to the GoldMine Contact Record, select **Enable Auto-Linking when Sending E-mail**.
7. To automatically link retrieved messages to the GoldMine Contact Record, select **Enable Auto-Linking when Retrieving E-mail**. If you select this option, you can also select **Prompt if E-Mail is not on file**.

Note: This option automatically launches the Attach E-mail to a Contact dialog box when a matching contact is not located in the database.

8. Click **OK**. A dialog box appears informing you that the changes take effect the next time you run Outlook. Close and reopen Outlook to see the changes.

Adding GoldMine Fields to Outlook

You can configure the Outlook Inbox so that for any linked e-mail, you can display its linked status, the contact's name, company name, or account number from GoldMine.



You can add the column views in two ways. The first method uses the Inbox window's local menu. The second method uses the View menu.

To Add GoldMine Fields to the Inbox Display

1. In Outlook, open the **Inbox** window. Use one of the following methods to add columns:

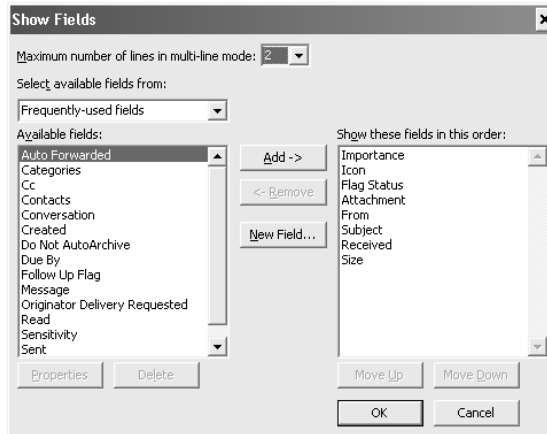
- **Local Menu Option:** Right-click on the view header (containing **Importance**, **Icon**, **Flag Status**, **Attachment**, **From**, **Subject**, and **Received**) to display the local menu.
- **Main Menu Option:** Select **View>>Current View**.

Note: For Outlook 2003 users, select **View>> Arrange By>>Custom**, and then click **Fields**. Skip to step 4.

2. Select **Customize Current View**.

3. In the **View Summary** window, click the **Fields** button.

The **Show Fields** dialog box appears.




4. In the **Select available fields from** drop-down list, select **User-defined fields in Inbox**.
5. In the **Available fields** list, select a field, and then click **Add**. The field options are:
 - **GM**: Displays a check box in the Outlook Inbox to indicate an existing GoldMine contact and the link status.
 - **GM AccountNo**: Displays the GoldMine system account number.
 - **GM Company**: Displays the linked contact's company name.
6. To reorder the displayed columns, highlight the field you wish to move and drag it to the desired location in the list.
7. Click **OK** when the display order is set to your specifications.
8. Click **OK** again to close and return to your Outlook Inbox.

IMPORTANT: You must close and relaunch Outlook to see the changes.

Configuring the GoldMine Address Book

You can configure the integration to allow Outlook users access to a GoldMine Address Book that includes Users, Contacts, Additional Contacts, User Group Distribution Lists, and Contact Group Distribution Lists.

IMPORTANT: For Outlook 2000 users, the GoldMine Address Book is not available if your Outlook is in “Internet Only” mode. You will not have the ability to add services.

 For more information on how to switch to “Corporate or Workgroup” mode, please consult your Microsoft Outlook Help files.

To Configure the GoldMine Address Book

1. In Outlook, select **Tools>>E-mail Accounts**. The **E-mail Accounts** wizard appears.
2. In the **Directory** area of the **E-Mail Accounts** dialog box, select **Add a new directory or address book**.
3. Click **Next**.
4. On the **Directory or Address Book Type** dialog box, select **Additional Address Books**, and then click **Next**.
5. On the **Other Address Book Types** dialog box, select the **GoldMine Address Book**, and then click **Next**.
6. The **GoldMine Integration Services for Microsoft Outlook** information dialog box appears. If the **GoldMine Path** text box is empty or incorrect, click **Browse** to locate the correct GMW6.exe file. Type your GoldMine **User ID** and **Password**.
7. Before continuing, click **Select** to locate the **Contact Set** even if it appears properly entered in the text box.
8. Highlight the correct Contact Set and click **OK**.

9. Click **OK** to verify that the changes are applied the next time Outlook is run.
10. Click **OK** to save your changes.
11. Exit and relaunch Outlook.

Outlook now recognizes the GoldMine Address Book. Outlook users sending e-mail can now select the GoldMine Address Book, and choose from GoldMine Contacts, Additional Contacts, Contact Group Distribution Lists, Users, and User Group Distribution Lists. When you select **Tools>>Address Book**, select GoldMine addresses from the **Show Names from the** drop-down list.

CONGRATULATIONS! You have successfully configured the GoldMine Address Book for Outlook.

Displaying Information about GoldMine Integration Services

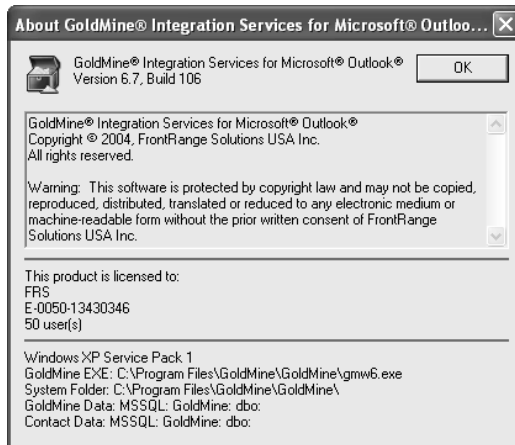
You can display the following details in Outlook about GoldMine Integration Services and GoldMine:

- Outlook version and copyright
- GoldMine serial number and number of users
- Operating system
- GoldMine system and data folders linked to Outlook

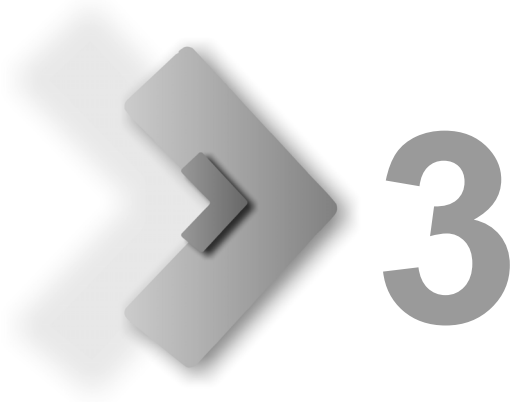
To Display Information about GoldMine Integration Services

1. From Outlook's menu bar, select **GoldMine>>About GoldMine Integration Services for Microsoft Outlook**.

The **About GoldMine Integration Services for Microsoft Outlook** dialog box appears.



2. Click **OK** to close.



Using GoldMine Integration Services for Microsoft Outlook

Overview

Using GoldMine Integration Services for Microsoft Outlook you can share and link contact information in a variety of ways. You can launch a GoldMine Contact Record while in Outlook, manually or automatically link Outlook messages to existing GoldMine contacts, and quickly create a new GoldMine contact and link e-mail.

Using the GoldMine Integration Services Toolbar



The **GoldMine Integration Services** toolbar buttons allow you to quickly execute the commands you need to link messages received in Outlook to Contact Records in GoldMine.

The **GoldMine Integration Services** toolbar contains six buttons:



Launch Contact Record in

GoldMine: Opens GoldMine and displays the Contact Record linked to the selected message.



Link message to GoldMine

contact: Links the selected message to a GoldMine Contact Record.



Create a new GoldMine contact and

link message: Creates a GoldMine Contact Record, and links the selected message.



Link all messages from this

sender: Links all messages from the sender to a GoldMine Contact Record.



Auto-Link all messages to GoldMine

E-Mails: Automatically links messages.



GoldMine Integration Services for

Microsoft Outlook Help: Accesses GoldMine Integration Services for Microsoft Outlook Help.

Linking Messages to GoldMine Contacts

While working in Microsoft Outlook, you can link e-mail messages to Contact Records in GoldMine. Outlook finds a matching e-mail address in GoldMine and allows you to link and create contacts. Using the GoldMine menu in Outlook or the GoldMine Integration Services toolbar, you can link incoming messages in the following ways:

- **Create a new GoldMine contact and link messages:** Select any Outlook message and quickly create a GoldMine Contact Record from it.
- **Automatically link e-mails to a GoldMine contact:** Enable automatic linking to link all outgoing Outlook messages to existing GoldMine contacts.
- **Manually link an e-mail message to a GoldMine contact:** From the Outlook Sent folder, link a single Outlook message to an existing GoldMine contact, or link all messages from this sender to an existing GoldMine contact.



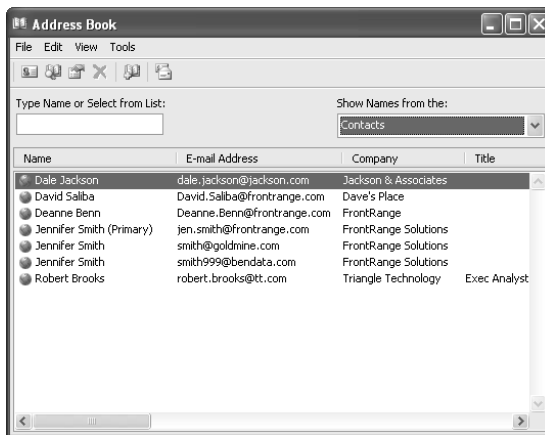
For detailed instructions on any of these processes, refer to the GoldMine Integration Services for Microsoft Outlook online Help.


Using the GoldMine Address Book in Outlook

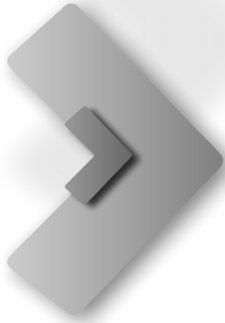
GoldMine Integration Services for Microsoft Outlook integrates data from GoldMine using your Outlook address book. When sending a message in Outlook, you can select users, contacts, additional contacts, and user and contact groups distribution lists from the GoldMine Address Book.

To use GoldMine e-mail addresses in Outlook, you must add the GoldMine Address Book, and then select the GoldMine Address Book when selecting the recipients to an e-mail message.

If a contact has multiple e-mail address in GoldMine, all e-mails addresses will appear in the Outlook address book. You can set one e-mail address as the primary e-mail address in GoldMine. To distinguish between e-mails addresses, create a custom name for the contact in GoldMine. For example, change the contact information from Bob Jones to Bob Jones (primary) for the primary e-mail address.



 See "Configuring the GoldMine Address Book" on page 2-7 for information on adding the GoldMine Address Book.



Index

A

- Adding
 - GoldMine fields to Outlook, 2-5
- Address Book
 - configuring, 2-7
- Audience and Expertise, xiv

C

- Configuring
 - Address Book, 2-7
- Contacting
 - FrontRange Solutions, xv
- Creating
 - a new GoldMine contact, 3-3

D

- Document Conventions, xiv

F

- FrontRange Solutions
 - contacting, xv

G

- GoldMine Address Book
 - using in Outlook, 3-4

- GoldMine Fields
 - adding to Outlook, 2-5
- GoldMine Integration Services for Microsoft Outlook
 - information, 2-9
 - toolbar, 3-2
- GoldMine Menu Option, 2-2
- GoldMine Requirements, 1-2
- GoldMine Toolbar, 2-2

I

- Information about GoldMine Integration Services for Microsoft Outlook, 2-9
- Installing, 1-2
 - location of installer, 1-1

L

- Licensing, 1-8
- Linking
 - messages to GoldMine contacts, 3-3

M

- Manuals
 - reference, xv

Messages

- automatically linking, 3-3
- linking to GoldMine contacts, 3-3
- manually linking, 3-3

Multiple e-mail address

- distinguishing between, 3-4

O

Outlook Address Book

- multiple e-mail addresses, 3-4

Outlook Columns

- adding GoldMine fields to, 2-5

Outlook Menu Bar, 2-2

Outlook Requirements, 1-2

R

Requirements, 1-2

Resources

- manuals, xv

S

System Requirements, 1-2

T

Toolbar, 3-2

U

Using

- the GoldMine Address Book in Outlook, 3-4