

Subject: Installing and Using GoldMine® Link to Word
Date: April 17, 2003
Applies to: GoldMine® 6.0 Business Contact Manager, GoldMine® 6.0 Corporate Edition, GoldMine® 5.x

Installing and Using the GoldMine Link to Word

Preliminary Check List

Word Version Support

GoldMine® 6.0 Business Contact Manager and GoldMine® 6.0 Corporate Edition provide a new add-in link that works with Microsoft® Word 97 (v8.0), Word 2000, and Word 2002 (XP). The link will not work correctly, and is not supported, when used with Word 95 (v7.0) or Word for Windows 6.0x. To find out which version of Word you are running, start Word and select **Help>>About Microsoft Word**. The version number will be displayed at the top of the window that appears. Microsoft Word Technical Support can be reached at (425)462-9673.

The GoldMine Link to Word

If you installed the GoldMine Link to Word prior to upgrading to GoldMine 6.0, you should download and install the latest version of the link before attempting to use it again. The latest version of the GoldMine Link to Word can be downloaded from the FrontRange Solutions Support Services site at the following location:

<http://support.frontrange.com/attachments/downloads/GoldMine/gmlinkinstaller.exe>

Fax Application Support

GoldMine 6.0 supports faxing via WinFax Pro 7.01 through 9.0¹, RightFax 6.0, OmniRush 6.0, and Zetafax 7.5. This is achieved through the merge capability of Microsoft Word. Regardless of which faxing package you choose, your fax application must be installed before installing the GoldMine Link to Word. If you install the fax application after you install the link or wish to switch to a different fax application, you should reinstall the GoldMine Link to Word.

RightFax - RightFax is a multi-user network faxing system. To use RightFax, each machine must have a printer driver named RightFax installed and configured to print to the RightFax server.

WinFax - WinFax Pro 7.01 through WinFax 9 are supported. If you intend to use WinFax 7.01, make sure you have an executable file dated later than 11/24/95 or a version of 7.01 or greater. To check the date of the Faxmng32.exe file, select **Start>>Find>>Files or Folders** and type **Faxmng32.exe** and then select **Find Now**. When you find the program file, scroll right to reveal the modified date. Check the version of WinFax by selecting **Help>>About** from WinFax to confirm that you have version 7.01 or greater. If necessary, contact WinFax Technical Support to obtain the proper patches to update version 7.00 to 7.0x.

OmniRush Z-Firm's OmniRush server provides a fully integrated, multi-user, network fax solution. For details, visit the Z-Firm LLC Web site at <http://www.zfirmllc.com>

¹ WinFax Pro 10.0 has not been tested, but some users have reported success using it.

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Zetafax - Zetafax, developed by Equisys, is a fax server that allows users to fax directly from Word, Excel and PowerPoint. For more information, please visit Equisys' Web site at <http://www.equisys.com/>.

Word's ODBC Drivers

You must have Word's **dBASE** ODBC drivers installed for the group mail merge functionality to work correctly. To check whether your copy of Word has the proper ODBC driver installed, perform the following steps in Microsoft Word 97/2000/:

1. Select **Tools>>Mail Merge**.
2. Select **Create>>Form Letters**.
3. Select **New Main Document**.
4. Select **Get Data>>Open Data Source**.
5. In the Browse Window, select the **Files of Type** drop-down list in the lower left-hand corner and verify **dBASE files (*.dbf)** appears in the list.

If the dBASE ODBC driver does not appear in the above test, it must be installed using the Microsoft Office/Word CD. If the CD is not available, the driver is available from the Microsoft Web site at:

<http://msdn.microsoft.com/library/default.asp?url=/downloads/list/dataaccess.asp>

Someone comfortable with detailed operating system setup and configuration, such as your network administrator or an Authorized GoldMine Solutions Partner, should perform installation of the ODBC drivers. You can also reach Microsoft technical support at (206)462-9673 for help with applying this patch. FrontRange Solutions Sales can give you the name of an Authorized GoldMine Solutions Partner in your area for assistance with such operations. Contact FrontRange Solutions Sales at (800)654-3526.

To install the necessary ODBC driver for Office 97 (Office 2000 is very similar) perform the following steps:

1. Run MS Office 97 Setup (Setup.exe on MS Office CD-ROM).
2. Select **Add>>Remove**.
3. Select **Data Access**.
4. Select **Change Option**.
5. Select **Database Drivers**.
6. Select **Change Option**.
7. Select **dBASE drivers**.
8. Select **OK** to complete the installation.

Setting up an ODBC DSN

Some versions of Microsoft Office/Word have been observed to not properly install the dBASE ODBC driver. If the above steps do not successfully install the ODBC driver, follow the below steps for each affected workstation.

NOTE: On Windows NT, 2000 or XP workstations, you may need to log on using a Windows account with Administrator privileges to properly execute these steps.

1. Select **Start>Settings>Control Panel**.
2. Select **ODBC**.
3. Select the **ODBC Drivers** Tab.
4. Verify that **Microsoft dBASE** driver exists. If it does not, run the Office/Word Setup and install it.
5. Select the **User DSN** Tab.
6. Select **Add**.
7. Highlight **Microsoft dBASE Driver** and click **Finish**.

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8. Set the **Data Source name** to **dBASE Files**.
9. Click **OK** twice.

Word 2000/2002 (XP) Macro Protection

By default, Word 2000/2002 (XP) sets the security level of Word to **High**, in turn preventing the running of the macros required for the GoldMine Link for Word to function correctly. The setting of **High** can prevent the installation of the link or cause the installation process to not be initiated properly.

Setting the macro security to **Medium** will cause Word to prompt the user before running macros. Setting the security to **Low** will cause macros to run without user intervention. It is recommended you verify the macro security level is set to **Medium** or **Low**, prior to attempting to install the GoldMine Link for Word. If you set it to **Low** for the installation process, we recommend you reset to **Medium** after installation completes.

NOTE: Anti-virus programs can similarly inhibit the installation and functionality of the GoldMine Link for Word. It is recommended that they be disabled or turned off during the installation of the link.

To modify Word 2000/2002 (XP) security settings:

1. In Word 2000/2002 (XP), select **Tools>>Macros>>Security**.
2. Select the **Medium** (or **Low**) setting.
3. Select **OK**.

Office 97 SR-1 Patch

If you are using Microsoft Office 97, you must have the SR-1 Patch installed in order to use the GoldMine Link to Word. Some situations will prevent the patch from being installed on machines running Microsoft Windows 98. The current version of the SR-1 patch corrects this problem and is available for download from Microsoft's Web site at the following addresses:

US English - <http://download.microsoft.com/download/office97pro/sr1off9/SR-1/WIN98/EN-US/sr1off97.exe>

Once you have downloaded the updated SR-1 patch, double-click the `Sr1off97.exe` program. The patch should correctly update your Microsoft Office 97 files. SR-2 is also compatible and is also available from Microsoft. Any problems encountered during the application of either patch should be directed to Microsoft technical support at (206)462-9673.

Installing the GoldMine Link to Word

To merge information from GoldMine to Microsoft Word 97, Microsoft Word 2000 or Microsoft 2002 (XP), you must first install the GoldMine Link to Word.

It is strongly recommended that you first uninstall any existing versions of the link prior to commencing. If you do not have a previous version of the GoldMine Link to Word installed, proceed to the [installation](#) section of this document.

To uninstall previous versions of the link:

1. Verify that all instances of Microsoft Word are closed.
2. Launch **Windows Explorer** and navigate to your GoldMine folder (e.g. `C:\Program Files\GoldMine`).
3. Locate and double-click the **GMLinkInstaller.exe** file.
4. Select **Remove the currently install GoldMine Link to Word** and click **Next**.
5. Click **Next**.
6. Click **Finish**.
7. Click **OK** when prompted. You may now install the new link.

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To install the GoldMine Link to Word:

1. Verify that all instances of Microsoft Word are closed.
2. Log on to GoldMine.
3. Launch **Windows Explorer** and navigate to your GoldMine folder (e.g. C:\Program Files\GoldMine).
4. Locate and double-click the `GMLinkInstaller.exe` file.
5. Select **Install/Update the Link to Word 97, 2000, or 2002 (XP)** (if not already selected).
6. Click **Next**.
7. Click **Finish**.
8. Click **OK** to continue.

The installer will now launch Word and require additional input.

Once Word has opened, you will be prompted to select a language for your link installation.

1. Select a language from the drop-down list and click **OK**.

The installation process will commence.

2. Click **OK** at the prompt.

Verify that the settings are configured to your liking. See [Figure 1](#) for additional information on these settings.

3. Click **Save Preferences** when satisfied.
4. Click **OK** to complete the installation process.

The GoldMine Link to Word is now installed.

Updating Previously Created Form Templates

Merge form templates created with previous versions of the GoldMine Link to Word or for use with previous versions of Microsoft Word or GoldMine may need to be updated before they can be used again.

To update an existing template, complete the following steps for each template:

1. Log on to GoldMine with Master rights.
2. Select **Edit>>Custom Templates**.
3. Right-click on the template that you want to update.
4. Select **Properties**. Click **No** if prompted to make a copy.
5. Select **Edit**.

GoldMine will now start Word, and load the selected template. Make any necessary changes to the template prior to updating it. Once finished modifying the template, proceed to update it for use with the new GoldMine Link to Word.

6. In Microsoft Word, select **GoldMine>>Update GoldMine Template**.
7. Close the document and exit Word. Do not re-save the document if Word requests that you do so.
8. In GoldMine, click **OK** to close the **Document Template Properties** window.

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(Figure 1)

The screenshot shows the 'GoldMine Link Preferences' dialog box. It includes a 'Language...' dropdown set to 'English (United States)'. There are three checked options: 'Delete merge DBF when done.', 'Prompt for group merge destination (print only)', and 'Show Send Screen'. There are two unchecked options: 'Always Auto Refresh Field List' and 'Use 'Fine' resolution'. The 'Field Switches' field contains '*CHARFORMAT'. The 'Fax Method' dropdown is set to '(none)' and the 'Fax Number Macro to use' field contains '&FAX'. A 'Save Preferences' button is at the bottom right. Callout boxes provide instructions for each option.

If you wish to keep the merge database file after you send a mass mailing, uncheck **Delete merge DBF when done**.

For Word to automatically update it's list of available *GoldMine* fields, select **Always Auto Refresh Field List**.

When checked, the **Prompt for group merge destination (print only)** option will allow changes to be made to your document prior to mass merge.

Enter the appropriate **Field Switches** for use with your version of Word. English, French and German language versions should accept the default entry.

Select your fax application from the **Fax Method** drop-down list.

Select the macro to use for fax dialing from the **Fax Macro to use:** drop-down list. &FAX will be suitable for most dialing situations. See the **Fax Info** information for details.

To skip displaying a status screen when faxing, uncheck **Show Send Screen**.

To use a draft resolution when faxing, uncheck **Use 'Fine' resolution**.

To view details about the *GoldMine* Word link, select **Information**.

For detailed information about Fax options, select **Fax Info**.

Using the GoldMine Link to Word

The GoldMine Link to Word enables you to create custom correspondence that can be printed or faxed with personalized information for one, some or all of your contacts. You can use the GoldMine Link to Word to print or fax letters and memos, create envelopes and mailing labels for one contact, a group of contacts, or all contacts.

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Creating a Template

To create form letters, memos, or faxes for repeated use, you must first create a template. A template is the structure that holds basic document information, such as selected contact information (merge fields) and the text body. GoldMine provides a set of standard template forms, but you will probably want to add your own templates. Using Word and the GoldMine Link to Word, you can insert a GoldMine field on the document and, with appropriate accompanying text, create personalized merge forms for use with your GoldMine database.

To create a simple merge form template:

1. Log on to GoldMine and launch Word.
2. In Word, create a new blank document.
3. To add the contact's name and address information, position the cursor where you want to start the address block.
4. Select **GoldMine>>Insert GoldMine Field(s)**.
5. Select **&NameAddress** from the drop-down list.
6. Add a few blank lines by pressing [Enter] on your keyboard.
7. Type your letter or repeat these steps to insert other GoldMine information. Once you have finished creating your template complete the following steps.
8. Select **GoldMine>>Save as GoldMine Template**.
9. Type a descriptive **Title**. This will be the name of the document template in the GoldMine **Document Management Center**.
10. Type the **Subject** of the letter.
11. Add optional entries for **Keywords** and **Comments**, if desired.
12. Select **OK**.
13. Select the file format for the template from the drop-down list. You must save the file in either the standard **.doc** or **.dot** format.
14. Type the **Filename**.
15. Select **Save**.

Your GoldMine Template is now complete. Close the document and exit Word. Do not re-save the document if Word requests that you do so. Doing so will cause Word to save it as a regular Word document and will discard all GoldMine field data in the process.

Your form will now appear in the GoldMine **Document Management Center** under your user name. To access it, select **Edit>>Custom Templates**. Notice that your custom template now appears under **Letters, Memos and Faxes** section. It can be moved to one of the other categories, as appropriate. Right-click the desired template and select **Properties**. Here you can specify the section the template appears in by selecting the corresponding radio button.

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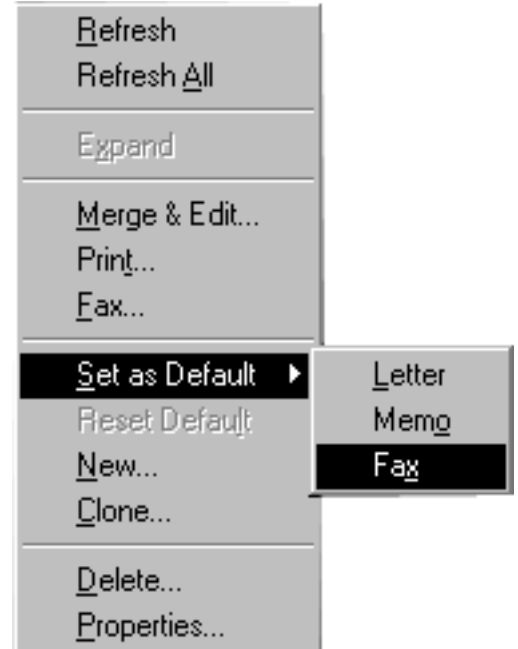
Printing and Faxing Your Custom Templates

Once you create a template and place it in the **Document Management Center**, it can be Faxed or Printed to the current contact (or a filtered/grouped subset of contacts) by simply right-clicking on the document and selecting **Fax...** or **Print...** If you would like to edit the document before faxing or printing it, select **Merge & Edit...**

NOTE: **Merge & Edit...** will use only the current contact's information.

Default Templates

Your custom templates can be set as the default letter, memo or fax template. Right-click the template and select **Set as Default** and then select the appropriate default item, **Letter**, **Memo** or **Fax**. Specifying a default template for each of these actions will enable you to use your custom templates to quickly create a new document for a contact record by selecting **Contact>>Write** from the main *GoldMine* menu bar and then selecting one of the sub-menu items **Letter to Contact**, **Memo to Contact** or **FAX to Contact**.



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