

GoldMine E-mail Setup

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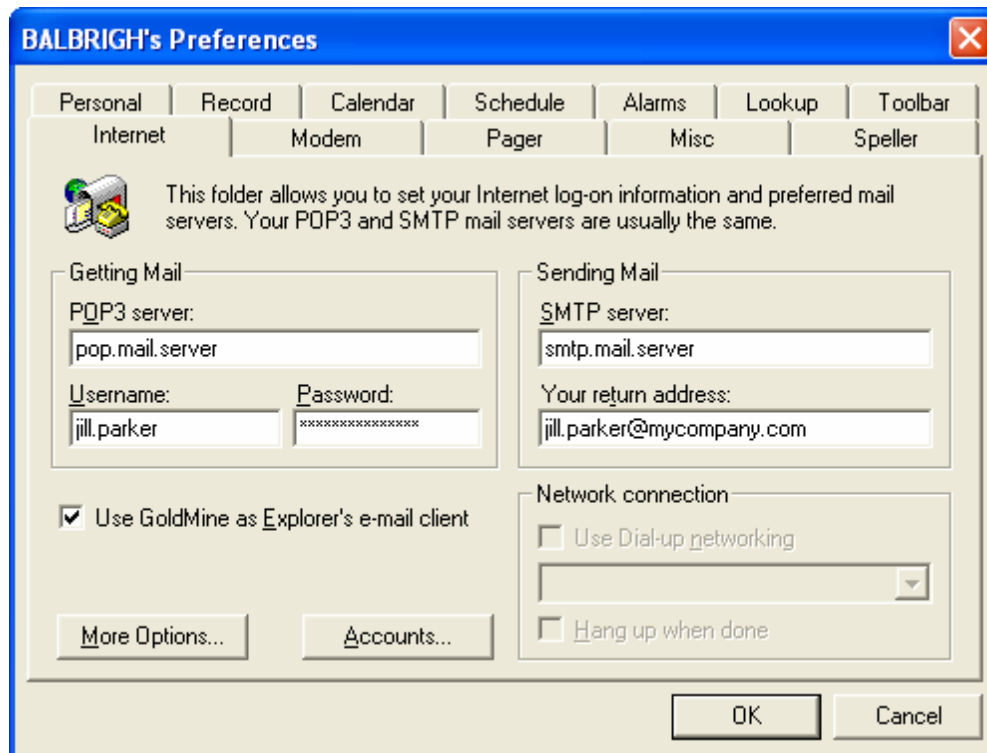
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GoldMine E-mail Setup

In order to send and retrieve e-mail through GoldMine you must have your e-mail options configured on the **Preferences>>Internet** tab. Also note that if you currently use **AOL** as your e-mail provider, you will not be able to use GoldMine e-mail. AOL uses a proprietary e-mail format rather than the industry standard POP/SMTP standard and GoldMine will not interface with it.

Note: You cannot edit Internet Preferences while the E-mail Center window is active on the screen.

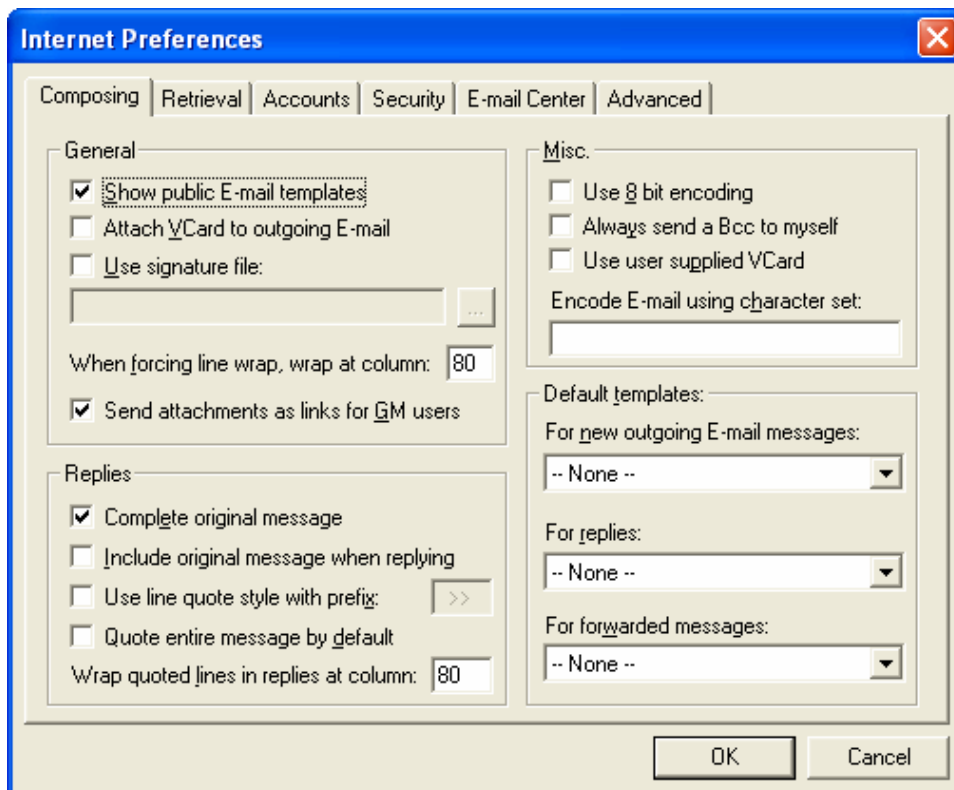
1. Select **Edit>>Preferences**. The **User's Preferences** dialog box appears.
2. Select **Internet**.



3. In the **Getting Mail** area, complete the following text boxes:

- **POP3 server:** Type your e-mail server name or IP address. It can be your local Exchange server or the POP3 server for your ISP.
- **Username:** Type your login ID for your e-mail account.
- **Password:** Type your password for your e-mail account.
- Select **Use GoldMine as Explorer's e-mail client** so that Microsoft Internet Explorer (IE) recognizes GoldMine as your Internet e-mail application.

4. In the **Sending Mail** area, complete the following text boxes:
 - **SMTP server:** Type your e-mail server name or IP address. It can be your local Exchange server or the SMTP server for your ISP.
 - **Your return address:** Type your complete e-mail address.
5. In the **Network connection area**, you can configure the following:
 - **User Dial-up networking:** Select this option to dial your Internet provider automatically when you send and retrieve Internet e-mail. If you subscribe to more than one Internet provider, you can select the provider that you want GoldMine to dial by selecting the Internet account from the drop-down list next to the field that appears below this option.
 - **Hang up when done:** Select this option to have GoldMine terminate the telephone connection when you are finished sending and retrieving Internet e-mail.
6. The **More Options** button allows you to configure the following Internet settings in more detail.



A. Composing

1) In the **General** area, you can select the following:

- **Show public E-mail templates:** The drop-down list on the Subject line when you are composing an e-mail will list all e-mail templates saved to (public) in the E-mail Templates dialog box.
- **Attach VCard to outgoing E-mail:** Attaches your VCard (.VCF file) to each e-mail message. A VCard contains information similar to a Contact Record. If the receiving system has VCard capabilities, the system will decipher the .VCF file to import this information. If you use GoldMine to retrieve e-mail, GoldMine can use the VCard information to create a Contact Record.
- **Use signature file:** Attaches a signature file to all messages for either the single account, or for the default account if additional Internet accounts have been defined in the Accounts tab. This entry overrides an entry for the default account made in the Accounts tab; however, the entry will have no effect on other accounts. The signature file is a text file that can contain any information about you, your organization, telephone number quotations, etc., that needs to be included in the e-mail message. Type or browse to the signature file in the field below the option label.
- **When forcing line wrap, wrap at column x:** Specifies how many characters GoldMine includes before the text wraps to the next line. By default, GoldMine wraps to the next line at the 80th character in a line.
- **Send attachments as links for GM users:** Provides the link to each attached file for GoldMine users instead of sending the files to each recipient. This is a space saver for users on the same shared network.

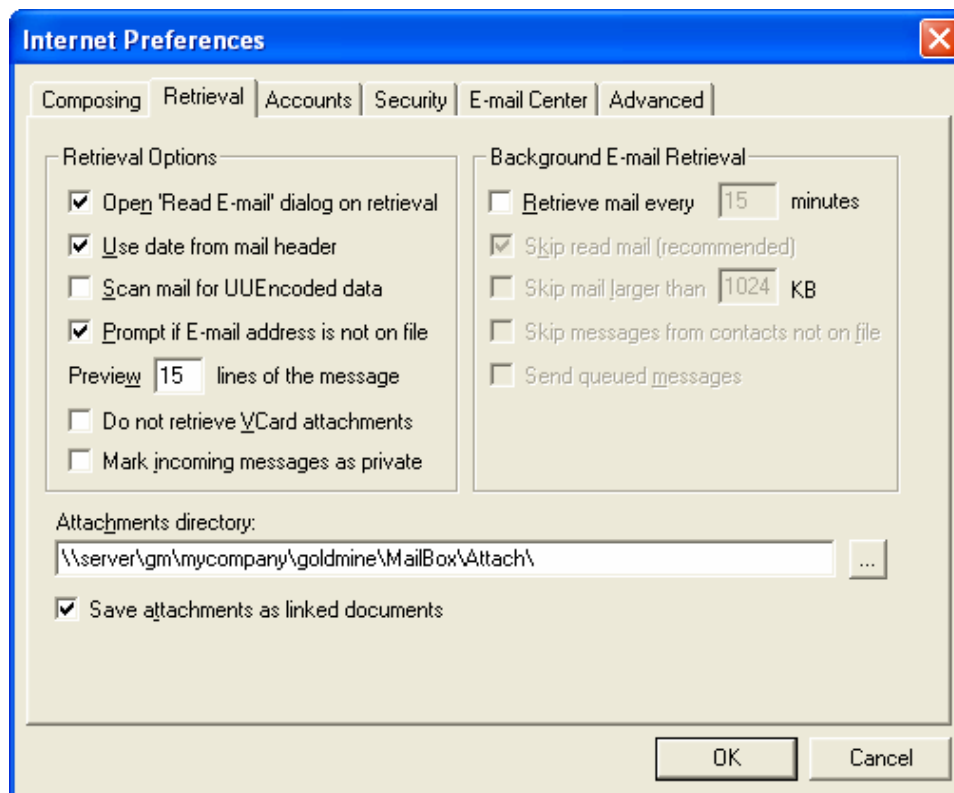
2) In the **Replies** area, you can select the following:

- **Complete original message:** Places an entry on the History tab when you reply or forward a message. If you do not want to designate the original message as a completed activity when you respond, clear the check box.
- **Use line quote style with prefix:** Specifies the characters GoldMine uses to identify lines quoted from the original message when you copy those lines into your reply. By default, GoldMine uses ">>."
- **Quote entire message by default:** GoldMine will copy the entire text of the original message in your reply, using the characters entered in **Use line quote style with prefix**.
- **Wrap quoted lines in replies at column x:** Specifies the number of characters GoldMine uses before wrapping to the next line of quoted text. You can use this option to create an indented block for text quoted from the original message. By default, GoldMine wraps to the next line at the 80th character in a quoted line.

3) In the **Misc.** area, you can select the following:

- **Use 8 bit encoding:** Converts seven-bit encoding into eight-bit encoding. This option is especially useful for international GoldMine users.
 - **Always send a Bcc to myself:** Sends a blind courtesy copy (bcc) of each outgoing message to your e-mail account.
 - **Use user supplied VCard:** Ensures that the VCard you attach to your outgoing e-mail includes updates.
 - **Encode E-mail using character set:** To encode your messages with a special character set, type the character set in the field. 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.
- 4) In the **Default templates** area, you can select Public or your user-defined templates from the drop-down lists for new outgoing E-mail messages, replies and for forwarded messages
- Note:** The templates must be created before they are available in the drop-down lists.
- 5) Click **OK** to save the settings and close the window, or click on the next **Internet Preferences** tab you want to configure.

B. Retrieval



1) In the **Retrieval Options** area, you can select the following:

- **Open 'Read E-mail' dialog on retrieval:** Once e-mail is retrieved, GoldMine opens and displays the first retrieved message.
- **Use date from mail header:** Sets the date of incoming mail to the date sent, as indicated in the header information of the message. Selecting this option ensures that your e-mail will be posted in true chronological order on your calendar.

Note: If you do not retrieve e-mail frequently, you may want to clear the check box corresponding to this option. For example, with this option selected, an e-mail message sent four days prior to retrieval will be posted in the calendar with the "four-day-old" date.

- **Scan mail for UUEncoded data:** GoldMine scans the Internet mail server for any e-mail messages that contain UUEncoded attachments. Selecting this option does not affect the retrieval of MIME-encoded files.
- **Prompt if E-mail address is not on file:** GoldMine displays the **Attach E-mail to Contact** dialog box upon retrieving an unlinked e-mail message. From the dialog box you can select options for linking the message.
- **Preview x lines of the message:** Specifies the number of lines of text that GoldMine displays in the lower pane of the E-mail Center. By default, GoldMine displays 15 lines.
- **Do not retrieve VCard attachments:** If you select this option, GoldMine will not retrieve VCards with incoming e-mail. To retrieve VCards attached to incoming e-mail, do not select this option.
- **Mark incoming messages as private:** Limits the information available to other users about your incoming messages, and prevents unauthorized users from reading the text of your incoming e-mail.

2) In the **Background E-mail Retrieval** area, you can select the following:

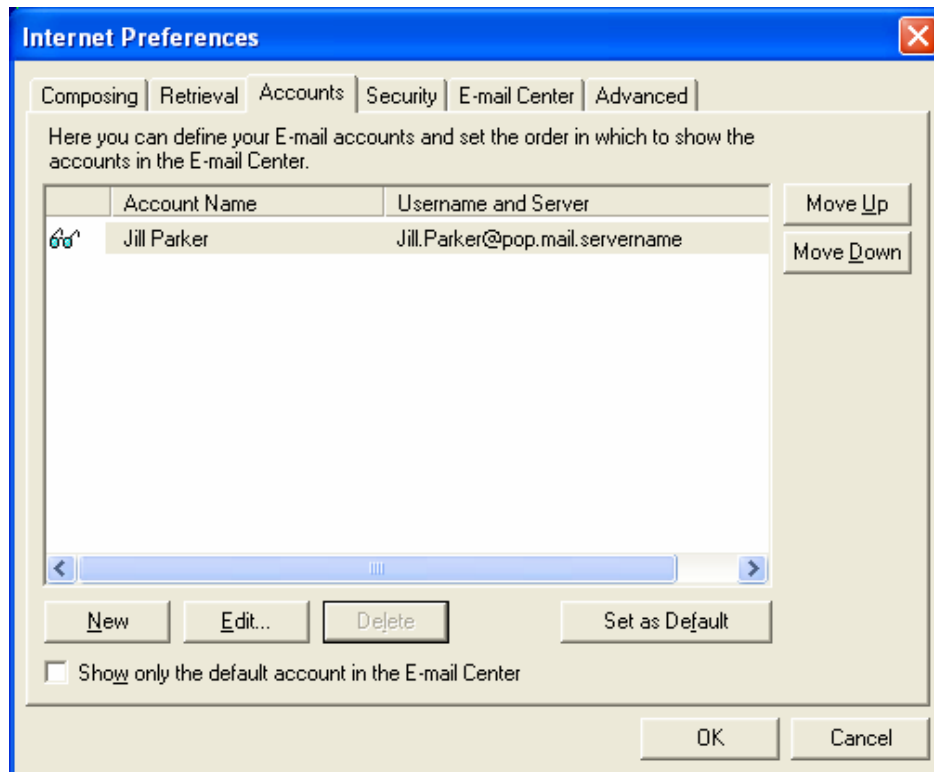
- **Retrieve mail every x minutes:** GoldMine automatically connects with your POP3 mail server to check for new mail at the interval you specify. For example, if you want to retrieve waiting Internet e-mail every two hours, type 120 in this field. The default value of 15 sets GoldMine to scan for and retrieve waiting e-mail every 15 minutes. For this setting to take affect, you must also select **Auto-retrieve** on the **Accounts** tab of the Internet Preferences window. If you do not select Auto-retrieve, but select **Retrieve mail every x minutes** and **Send queued messages** (see below), GoldMine sends queued mail only.

Note: The following options are available only if you select **Retrieve mail automatically every x minutes**.

- **Skip read mail (recommended):** Bypasses displaying any e-mail messages that you have already read.
 - **Skip mail larger than x KB:** GoldMine retrieves only Internet e-mail messages that are equal to or smaller than the kilobyte (KB) value in this field. By default, GoldMine will skip messages that are 1024KB or larger.
 - **Skip messages from contacts not on file:** GoldMine retrieves only e-mail from those contacts who have Internet e-mail addresses in their record.
 - **Send queued messages:** GoldMine sends all queued messages when automatically retrieving mail.
- 3) Type or browse to the location of the **Attachments directory**. This is the destination folder for retrieved e-mail attachments.
 - 4) Select **Save attachments as linked documents** to link files attached to incoming e-mail to the senders' contact record. To prevent linking attachments to your contacts, clear this option.
 - 5) Click **OK** to save the settings and close the window, or click on the next **Internet Preferences** tab you want to configure.

C. Accounts

- 1) Select **Accounts**. The accounts are listed in the text box.



- 2) To add a new account, click **New**. The **E-mail Account Properties** dialog box appears. You can define properties for an additional Internet e-mail account. A user can log in and retrieve mail for up to 256 separate accounts.
- 3) To remove an account, select the account and click **Delete**. This option removes the Internet account.

Note: Be sure that you want to delete the account because the account is automatically deleted once you select Delete—no confirmation prompt appears.

- 4) To edit an existing account, select the account and click **Edit**. The **E-mail Account Properties** dialog box appears.

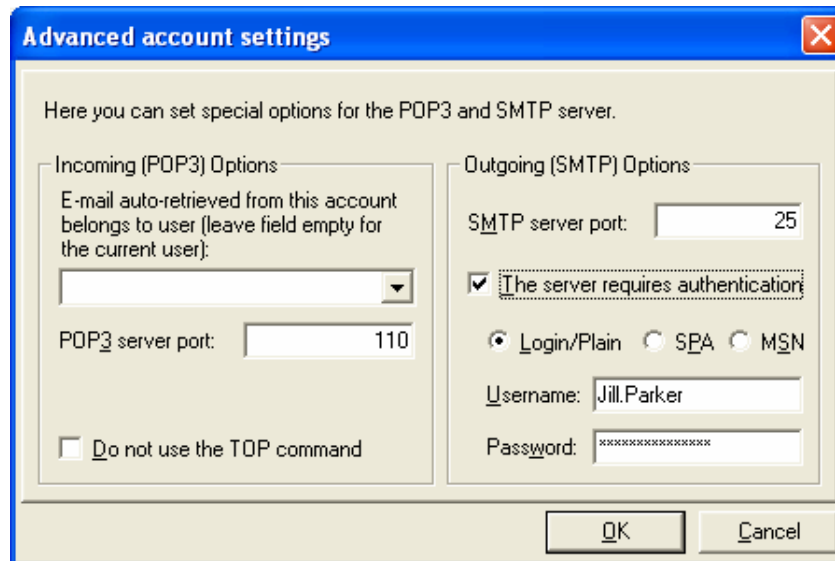
- a. In the **Account Name** text box, type a descriptive name for the account that will appear on the Accounts tab and in the E-mail Center.
- b. Select **Show the account in the E-mail Center** to display the account in the E-mail Center. If you do not want the account to appear in the E-mail Center, clear the option. (Note that this box is available only when creating an account, not editing one.)
- c. In the **Getting Mail** area, you can configure the following:
 - **POP3 server:** Type the name of the mail server retrieving your mail. If you do not know the correct entry for this field, contact your Internet Service Provider.

- **Username:** Type the user id you use to log into your Internet mail server. Type only your user account name, not your entire e-mail address.
- **Password:** Type the password for your Internet mail account. When you type the password into the field, each character appears as an asterisk (*).
- **Auto-retrieve:** Select Auto-retrieve if you want GoldMine to automatically connect with your POP3 mail server for the selected account and check for new mail. The interval for checking the account is defined globally on the Retrieval tab. GoldMine will check for new mail in all accounts that select this option.
- **Auto-delete:** Select Auto-delete to remove messages from the Internet mail server after they have been retrieved.
- In the **Authentication** area, select one of the following ways your POP3 server recognizes and authenticates your account and password. You may need to ask your ISP for the correct setting.
 - **PASS:** Sends your user name and password without encoding (default).
 - **APOP:** Sends your user name and encrypted password, enhancing the security by preventing other users on the Internet from learning your password. This is a safer protocol to use, but as yet is not frequently implemented.
 - **SPA:** Uses a challenge-response method for password authentication, enhancing security by avoiding a clear transmission over a network.
 - **MSN:** Uses challenge-response method for password authentication with distributed servers owned by MSN and MSN partners. Similar to SPA, MSN authentication enhances security by avoiding a clear transmission over a network.

d. In the **Sending Mail** area, you can configure the following options:

- **SMTP server:** Type the name of the mail server sending your mail. For example, the structure of the entry might be mail.somewhere.com. Typically, you will use the same server for both your SMTP server and your POP3 server. If you do not know the correct entry for this field, contact your Internet service provider.
- **Your return address:** Type your Internet address. This is typically a combination of your Internet user name and your server name. For example, john DOE@somewhere.com.
- **Use signature file:** Attaches a signature file to all messages for the account. Select **Use signature file** and browse to the location of your signature. The signature file is a text file containing any special information about you, your organization, telephone number, quotations, etc.

e. Click **Advanced Options** to define additional settings for the account's POP3 and SMTP servers.



- In the **Incoming (POP3) Options** area, you can configure the following settings:
 - **E-mail auto-retrieved from this account belongs to user:** Select the user from the drop-down list. The selected user is designated as the owner of that Internet e-mail retrieved from that account. If the account holder is the currently logged user, leave the field blank.
 - **POP3 server port:** Type any non-standard port address to the POP3 server for the selected account. This option allows greater flexibility in setting up a nonstandard server. The default POP3 Port value is 110. Typically, this entry should not be changed. However, if your account uses a non-standard POP3 server configuration requiring a different port entry, contact your network administrator or Internet service provider.
 - **Do not use the TOP command:** Select this option to disable message previewing in the lower-right pane of the E-mail Center. The TOP command enables GoldMine to display a "preview" of the number of lines specified in Preview x lines of the message in the Retrieval tab of the Internet Preferences window. If you select **Do not use the TOP command**, GoldMine will not display the e-mail account in the E-mail Center. However, you can still retrieve e-mail for the account by selecting either the Auto-retrieve option, or by setting up retrieval conditions in the Server Agents Administrator.

Note: Some e-mail servers do not support the TOP command, and will cause problems with your e-mail display if TOP is activated. Select **Do not use the TOP command** if you experience problems with e-mail retrieval.

- In the **Outgoing (SMTP) Options** area, you can configure the following settings:
 - **SMTP server port:** Specifies the port address to the SMTP server for the selected account. This option allows greater flexibility in setting up a non-standard server. The default SMTP Port value is 25. Typically, this entry should not be changed. However, if your account uses a non-standard SMTP server configuration requiring a different port entry, contact your network administrator or Internet service provider.
 - **The server requires authentication:** Select this option to provide authentication values to the SMTP server. When you check the box, you can then select the appropriate authentication method.
 - If you select the authentication option, type the **Username** and **Password** for the authentication in the appropriate text boxes.
- Select **OK** to return to the **E-mail Account Properties** dialog box.
- Select **OK** to return to the Accounts tab of the Internet Preferences window.
- f. To remove an account, select the account and click **Delete**. This option removes the Internet account.
- g. **Note:** Be sure that you want to delete the account because the account is automatically deleted once you select Delete—no confirmation prompt appears.
- h. If you have multiple accounts, you can set one account as your primary account by highlighting the account and clicking **Set as Default**. The default account is indicated by a green ball or dot in the Accounts display box.
- i. Select **Show only the default account in the E-mail Center** if you have multiple accounts but only want the default account to display in the E-mail Center. The accounts set to display in the E-mail Center are indicated by eyeglasses to the left of the account name in the Accounts display box.

Note: By default, GoldMine shows all accounts in the E-mail Center so that you can check all Internet accounts easily from one location in GoldMine.

- j. You can change the order of the accounts displayed in the E-mail Center. Click **Move Up**, to move the highlighted account up one line. Click **Move Down**, to move the highlighted account down one line.
- k. Click **OK** to save the settings and close the window, or click on the next **Internet Preferences** tab you want to configure.

D. Security

If you have a digital ID to verify your signature and to receive encrypted e-mail messages, GoldMine allows you to configure your Internet Preferences to include the information when sending a message.

More information about Digital IDs can be found in the GoldMine Help files and under the Technical Documents section of the FrontRange Support site at support.frontrange.com.

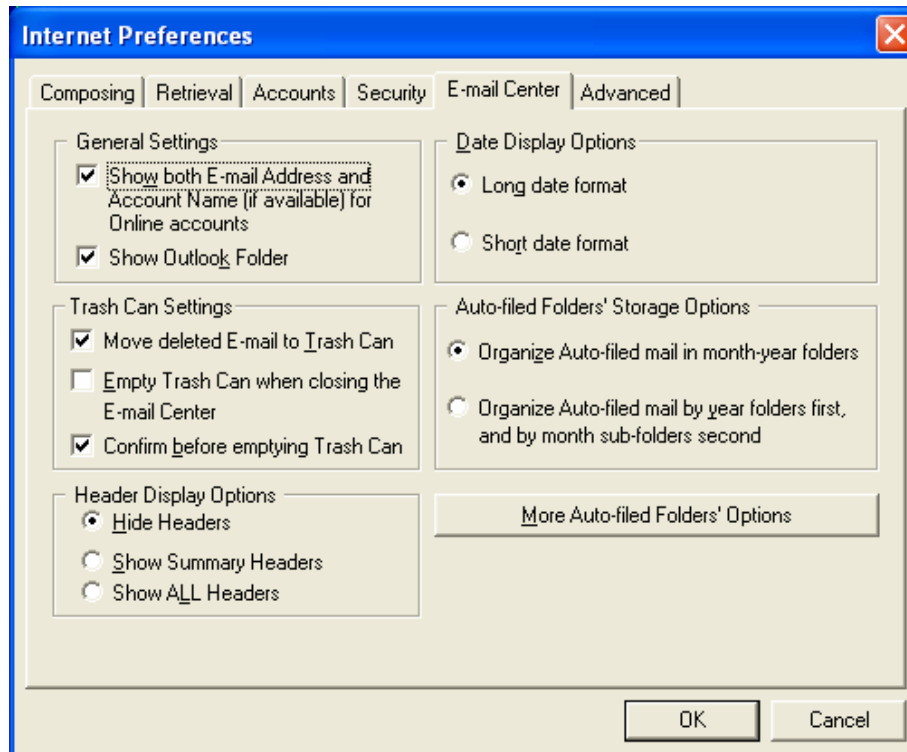
- 1) Click **Digital ID(s)** to configure your IDs. The **Manage Digital IDs** dialog box appears.
- 2) In the **Signature Settings** area, you can select the following option:
 - **Sign ALL outgoing E-mail with a Digital ID, by default:** Sends all your e-mail messages with your digital ID. If you do not select this option, you can still encrypt individual messages by selecting **Encrypt Messages** on the Edit E-mail toolbar. The message is sent with a signature, but it is not encoded (clear). This allows recipients who cannot support S/MIME to read the message.
 - **Encode any outgoing E-mail signed with a Digital ID (Recipients required to have S/MIME to read 'opaque' messages):** Sends outgoing e-mail messages signed with your digital ID as S/MIME encoded (opaque). Older e-mail clients that do not support S/MIME will not be able to read the body of this type of e-mail message.
- 3) To encrypt all outgoing messages by default, select **Encrypt ALL outgoing E-mail, by default (Recipients' Certificates are required in advance)**. Selecting this option sets the encryption to digital IDs on outgoing messages. Even with this option selected, you can select **Do not Encrypt** on the encryption menu on the Edit E-mail toolbar.
- 4) In the **Other Settings** area, you can select the following options:
 - **Import new/updated certificates for ALL incoming signed E-mails, by default:** Automatically imports the digital ID on all signed incoming messages into the contact's **Record Properties>>Contact Details>>Digital IDs** tab.
 - **Save ALL incoming S/MIME e-mails as 'clear' messages:** Saves all S/MIME encoded (opaque) messages and all encrypted messages as clear, or not encoded. As clear-text messages, all GoldMine users with access to the e-mail record can read the messages. If this option is not selected, the messages are saved as they were received. Whenever a GoldMine user, either the recipient or another user, wants to read the e-mail message, he will need to enter the password for the private key of the GoldMine recipient. Remember, for security reasons, only the recipient should know the password for his

private key.

If you do not select this setting, encrypted messages from contacts will be unreadable by other users on the History and Pending tabs. Carefully consider the consequences before clearing this option.

5) Select another tab or click **OK** to save and close the dialog box.

E. E-mail Center



1) In the **General Settings** area, you can select the following options:

- **Show both E-mail Address and Account Name (if available) for Online accounts:** Select this option to list the accounts in the E-mail Center by both the E-mail Address and the Account Name. If the Account Name is left blank, GoldMine uses the e-mail address as the account name. If the Account Name contains an entry and you clear this option, GoldMine lists the account by the Account Name only.
- **Show Outlook Folder:** Displays the Outlook folder from the local computer in the E-mail Center.

- 2) In the **Trash Can Settings** area, you can select the following options:
 - **Move deleted E-mail to Trash Can:** Places deleted mail in the Deleted folder of the E-mail Center. GoldMine holds the mail until you select **Empty trash can** in the local menu.
 - **Empty Trash Can when closing the E-mail Center:** Automatically deletes any messages placed in the Deleted folder when you close the E-mail Center.
 - **Confirm before emptying Trash Can:** Displays a warning prompt for you to confirm that you want to delete messages in the Deleted folder.

- 3) In the **Header Display Options** area, you can select one of the following options:
 - **Hide Headers:** Shows no header information in the e-mail message.
 - **Show Summary Headers:** Shows only relatively high-level information in the e-mail message, such as date, sender, subject, recipient, etc. This option does not show detailed routing information.
 - **Show ALL Headers:** Shows all header information in the e-mail message, including routing information and message ID.

- 4) In the **Date Display Options** area, you can select one of the following options:
 - **Long date format:** Spells out the date in the E-mail Center, including the day.
 - **Short date format:** Uses numeric format for month, day, and year, as well as the transmission time.

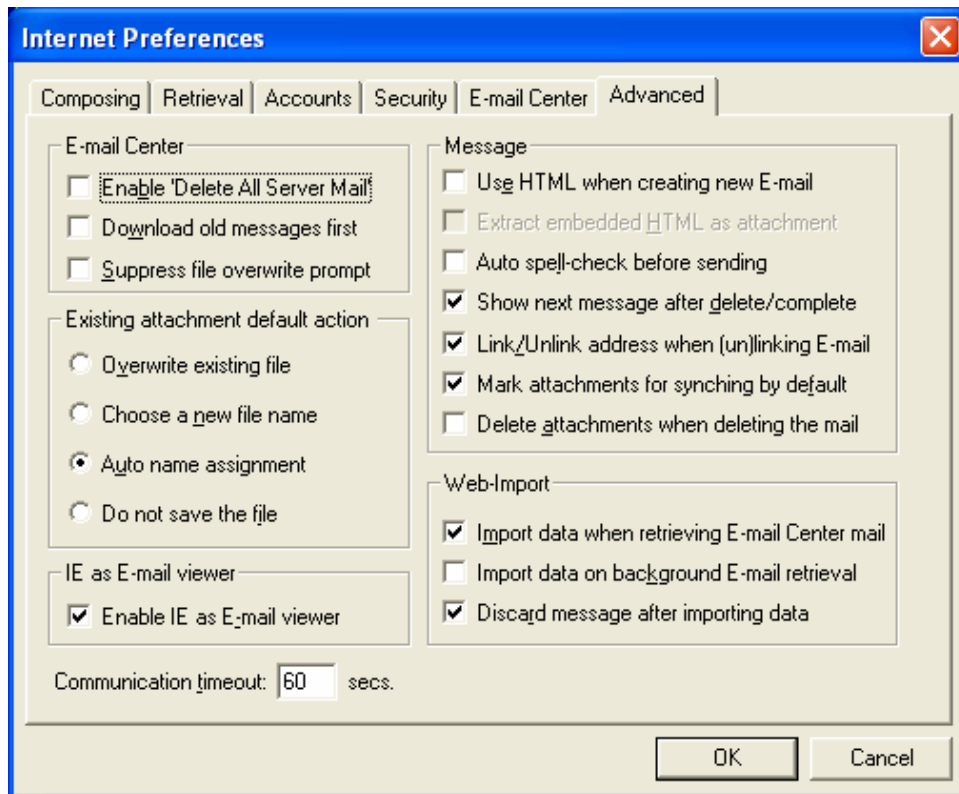
- 5) The **Auto-filed Folders' Storage Options** assign names to the E-mail Center folders storing incoming and outgoing messages. You can leave the default settings of **Filed** (incoming e-mail messages) and **Sent** (outgoing e-mail messages), or overwrite the entries to rename the folders. You can select one of the following options:
 - **Organize Auto-filed mail in month-year folders:** Uses one level to store incoming messages by Month, Year.
 - **Organize Auto-filed mail by year folders first, and by month sub-folders second:** Uses two levels to store incoming messages in month folders under separate folders for each year.

- 6) Click **More Auto-filed Folders' Options** to change the default month-name labels assigned to folders. The **Auto-filed Folders' Month Names** dialog box appears. Select **Override the default month names** and type the new label names you want to assign to the Filed folders. Click **OK** to return to the E-mail Center tab.

- 7) Click **OK** to save the settings and close the window, or click on the next **Internet Preferences** tab you want to configure.

F. Advanced

You can define advanced Internet settings to apply globally to your E-mail Center, existing attachment files, message operations, and data imported from a World Wide Web (WWW) site.



1) In the **E-mail Center** area, you can select the following options:

- **Enable 'Delete All Server Mail':** Select this option to activate the **Delete all messages on the server** button on the E-mail Center toolbar, allowing you delete all messages on the Internet mail server. By default, GoldMine does not include this icon in the E-mail Center toolbar. **Caution:** Using this toolbar option in the E-mail Center will delete all messages on the server **without a confirmation prompt**.
- **Download old messages first:** Select this option to retrieve messages from the mail server in chronological order (oldest to newest). By default, GoldMine retrieves messages in reverse chronological order (newest to oldest).
- **Suppress file overwrite prompt:** Does not display a warning before overwriting an existing file with an attached file having the same name.

- 2) In the **Existing attachment default action** area, you can select one of the following options to specify the default method for handling a file with the same name as a file:
 - **Overwrite existing file:** Replaces an existing file with an attached file using the same name.
 - **Choose a new file name:** Allows you to rename an attached file with the same name as an existing file.
 - **Auto name assignment:** Appends a number to the file name of an attached file with the same name as an existing file. If GoldMine cannot append a number (up to 64), a random, unique name is assigned to the new file.
 - **Do not save the file:** Deletes an attached file with the same name as an existing file.
- 3) Select **Enable IE as E-mail viewer** to use Internet Explorer to display messages with HTML formatting. If you select this option, you will disable the **Extract embedded HTML as attachment** option.
- 4) In the **Message** area, you can select the following options:
 - **Use HTML when creating new E-mail:** Enables GoldMine to recognize HTML encoding in incoming messages, and also to apply HTML formatting to outgoing messages. This option adds an HTML editing toolbar to the **Create Internet E-mail** dialog box that you can use to add a variety of formatting attributes, such as color, picture file insertion, and alignment.
 - **Extract embedded HTML as attachment:** Creates an HTML attachment from a message written as HTML that you can view with a Web browser. This option is not available if you select **Enable IE as E-mail viewer**.
 - **Auto spell-check before sending:** Automatically checks the spelling in a message when you select Send in the Create Internet E-mail dialog box.
 - **Show next message after delete/complete:** Once you have disposed of a selected message, GoldMine automatically displays the next message listed in the E-mail Center.
 - **Link/Unlink address when (un)linking E-mail:** Links an e-mail address from a retrieved message to the contact. To link messages to contacts without linking the e-mail address, clear this option.
 - **Mark attachments for synching by default:** Marks all e-mail attachments as linked documents to be synchronized, except for VCards and transfer sets.
 - **Delete attachments when deleting the mail:** Deletes attachments when you delete messages.
- 5) In the **WebImport** area, you can select the following options:
 - **Import data when retrieving E-mail Center mail:** Imports WebImport data at the same time GoldMine retrieves e-mail messages. If you prefer to manually import WebImport data, un-check this option.

- **Import data on background e-mail retrieval:** Imports WebImport data at the same time that GoldMine performs background e-mail retrieval.
 - **Discard message after importing data:** Deletes the WebImport message from the Web site after GoldMine retrieves the message.
- 6) In the **Communication timeout** text box, type the number of seconds GoldMine should remain idle before disconnecting from the mail server. The default value is 60 seconds.
 - 7) Click **OK** to save the settings and close the window, or click on the next **Internet Preferences** tab you want to configure.
7. The **Accounts** button takes you directly to the **Accounts** tab that is also available through **More Options** and was previously explained in this document.