GoldMine and Advanced Integration with Microsoft Office: Part I

The Back-story:

Companies invest a lot of time and money into making GoldMine a vital part of their information infrastructure. When the implementation is successful, employees gladly enhance and maintain the information because they experience, firsthand, the edge it affords them every day. Consequently, the GoldMine database can become the most up-to-date and accurate source of information within a company.

GoldMine enhances productivity by providing a link to Microsoft Word. By allowing users to create documents and templates that easily extract fields from the database, GoldMine takes the first steps down the road toward integration with Microsoft Office. However, power users want to extract data into Excel spreadsheets so they can manipulate the results, produce charts and graphs or merge the data with existing corporate information systems. And there's always someone who desires to have data from their status reports or some other corporate database find its way back into GoldMine, without manually entering it.

With custom GoldMine programming, anything is possible. Sometimes the most limiting factor is a lack of imagination about what IS possible. To illustrate, here's three examples of successful Microsoft Excel and GoldMine integration.

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Exhibit A:

RTec, a computer hardware manufacturer, uses GoldMine to manage RMA/repair, Technical Support and Corrective Action processes for their products. Having these important customer response issues appear in GoldMine allows salespeople to remain up to date regarding customer problems and the status of the problem resolution. Customer Service staff records RMA requests and Tech Support calls as Other activities in GoldMine. By assigning unique numbers to the Reference field for RMA and Tech Support calls and changing the Code field to reflect the current status, they track a returned and/or repaired item through the necessary stages of each process. Corrective Actions are coded in GoldMine as a Project, based on a template that includes 4 pre-defined tasks. Each task is a step in the Corrective Action review process that RTec uses to correct problems with product documentation, design or manufacturing.

However, getting a good picture of the overall state of any of these processes from inside GoldMine was difficult. Rtec, on the advice and with the help of their GoldMine integrator, decided that exporting the information captured in GoldMine to a series of Excel reports would enable them to get an overall picture of the status for RMA, Support Calls and Corrective Action. Various departments can now use these spreadsheets to spot problems and assess workload limits. In this case, Excel was an ideal output mechanism. To create this capability, an application was written in VBA that produced a series of 6 spreadsheets showing the status of open and closed RMAs, Tech Support Calls and Corrective Actions. The entire application is launched from inside GoldMine by an entry on the Tools menu. Standard Windows dialogs allow the selection of a particular report, and allow users to choose date ranges, sorting and formatting options. Report results are produced instantly in an open spreadsheet on the screen.

Installation of the entire application was accomplished by attaching the master spreadsheet containing the VBA code and its supporting report templates to a contact in GoldMine as a linked document. After launching this link manually the first time, it installed itself on the menu of that user's copy of GoldMine. Software updates are easy because everyone was using the same files; replacing a file updated everyone at once.

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Example 2:

Specialty Services Company has a flexible sales process, which renders most standard reporting tools useless. In their sales model, it is possible to start the sales process at almost any step and to skip some steps on the way to closing the sale. They track prospective sales as GoldMine Opportunities, modeling the sales stages as Tasks. Rather than adding all Tasks (sales stages) at the time they create the Opportunity, each salesperson enters Tasks as they begin to work on them.

For a single Opportunity, it was easy for them to see what sales stage they were in by inspecting the GoldMine contact. However, to get a big picture view, custom reports were needed. Company managers and salespeople wanted reports that told them what the next step was in the sales process. An algorithm was created that looked over all the stages in the sales process and then backtracked to find the next step. . Excel and VBA were used to create detailed reports showing each Opportunity, projected sales figures and close dates, scheduled activity and completion dates of each sales stage and the next stage to be completed in the sales pipeline. Reports can now be created for individual salespeople all the way up to entire national territories and the reports can be viewed and used by salespeople in the field as well as management.

In addition, Specialty Services sales personnel have large territories and often need a way to alter their schedules for weeks at a time when their travel plans change. Traditionally, this meant updating entries for each Opportunity along their route. The new report feature allows them to identify all the Opportunities that will be affected by their travel plans. Instead of locating each Opportunity in GoldMine and individually editing the affected sales stage (or stages), users can now change scheduled dates on any of the uncompleted sales stages. By choosing a menu entry in the report spreadsheet, all affected Opportunities in GoldMine are then automatically updated. This significantly improves accuracy, ease of use and saves time by allowing each salesperson to see and edit many entries at once.

Changes to the reports and spreadsheets are easily rolled out to end-users in the field by taking advantage of GoldMine's excellent synchronization facilities. Updating the master code-containing spreadsheet and attaching an additional spreadsheet template accomplishes this with a few mouse-clicks. When users in the field dial in to synchronize, the updated files quietly replace the old ones. The next

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time field users run the report, the new capabilities and reports are automatically present.

Example 3:

Finally, American Loans provides construction and renovation loans to non-profit organizations and uses GoldMine to track the loan process from first conversations and initial application through final approval. American Loans requires reports that show the stage and status of all outstanding loans. They preferred to manipulate this data within an Excel spreadsheet. A suite of reports was created using VBA in Excel. The reports include a feature that causes GoldMine to switch to the foreground and display a contact by simply clicking on the contact name in the Excel spreadsheet. This feature makes GoldMine and the Excel spreadsheet appear to be seamlessly connected thus improving the usability of the reports.

A cursory read of the above scenarios might suggest that producing a report, either through GoldMine's built-in tools or via a third-party package, could have satisfied the company's requirements. However, the resulting report is not the primary benefit. All three companies required Excel as an output medium. Users are comfortable working in Excel and can take advantage of that platform to manipulate the data, create graphs, pie charts and incorporate the data in other types of presentations. In addition, Excel data is easily merged with data from other corporate systems and eliminates the need to rekey. The presence of usability features such as clicking in Excel to find contacts in GoldMine and pushing edits in Excel back into the Opportunity Manager as updates have no equivalents in traditional reporting tools. Creating reports and applications that export to Word and PowerPoint is also popular.

GoldMine has made its Application Programming Interface (API) freely available since version 4. This API makes it possible to write software in any of several programming languages, among them, Visual Basic, C and Delphi. These custom applications can access the GoldMine database to produce complex reports, manipulate the user interface or input information directly. Over the years, third-party developers have created many add-ons, thanks largely to GoldMine's commitment to providing an open environment for these enhancements. Since

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Microsoft includes Visual Basic for Applications (VBA, a variant of the full Visual Basic) with Office, corporations have a powerful development environment already installed on each desktop that can take full advantage of GoldMine's API.

While all the tools needed to build a custom application are readily available and essentially free, don't overlook one key requirement for a successful implementation: a programmer with appropriate experience. It's important to keep in mind that the GoldMine database is a crucial corporate resource. It's not a good idea to have an inexperienced programmer experimenting with a mission-critical database. The time, and potential loss of business due to an errant data update could easily outweigh the cost advantages of doing it in-house. A programmer that is experienced in programming with GoldMine's API can make the entire process safe, efficient and cost-effective. Even in the case where a corporation has experienced programmers on staff, the development project may be better served by contracting with outside resources that have previously developed integrated applications for others. They will be able to help design a workable solution, conform it to your budget and provide the guidance to recognize and avoid pitfalls. Your local GoldMine Value Added Reseller (VAR) is a good starting point when searching for a partner in this process. Even if they don't have the resources on staff, they should be able to recommend someone with the necessary skills.

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For more information on how you can help your customer and win more business, call Linda O'Connor at (770) 663-4455 x 305 today.

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