

Import GoldMine Contacts

Step One - Overview

To use Infacta Group Mail to send your newsletter / mail shot to your GoldMine? contacts, it is necessary to first import these contacts into Group Mail. This tutorial does not cover importing from GoldMine? Corporate Edition however the process is similar to importing from GoldMine? Standard Edition.

With this tutorial we are going to go through the basic elements of importing Contacts from a GoldMine? Database into a Group Mail group.

There are two approaches to this

Export from GoldMine? to file, and Import into Group Mail using File Import

This method requires less configuration, however the actual Import Process takes longer. This approach is not covered in any detail in this tutorial however in summary here is the process (in GoldMine? version 6)

- Open GoldMine?
- Choose the menu Tools->Import/Export Wizard->Export Contact Records...
- Choose export to 'ASCII file'
- Select the Contacts and Associated fields to export
- Export the Contacts to file
- Open Group Mail Pro/Plus
- Choose the menu Tools->File Import

Follow the steps as described in the File Importing - Text Files tutorial [here](#)

Import directly into Group Mail using Database Import Plug-in

Initially there is more configuration involved using this method, however the actual import process is generally faster.

This involves first creating an ODBC Data Source and then using this Data Source in the Database import wizard that is included with Group Mail (Plus). This is described in more detail in the remainder of this tutorial.

Step Two - Create an ODBC Data Source

The 'ODBC Data Source Administrator' application is used to create an ODBC connection for Goldmine?. To run this application (figure 1) go to the Start menu, choose Run and type odbcad32 and click OK on Windows NT/2000/XP systems. For

older versions of windows the ODBC Data Source Administrator can be run from the 'Control Panel'.

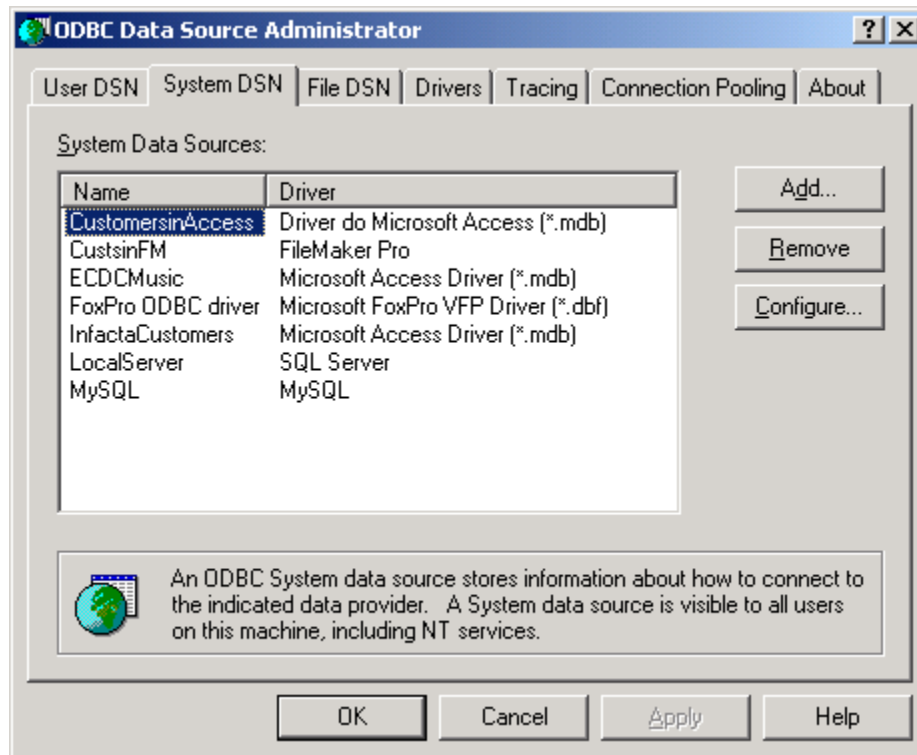


Figure 1

Select the 'System DSN' tab. We want to create a System Data Source for Goldmine?, to do this click on the 'Add' button to display the 'Create New Data Source' screen shown in figure 2.

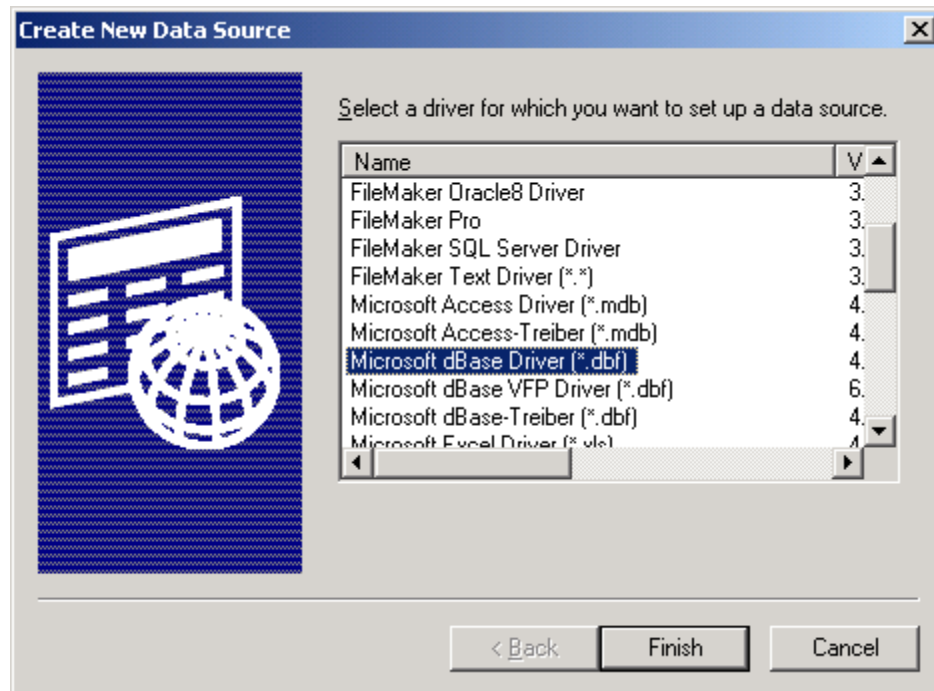


Figure 2

Select the 'Microsoft dBase Driver (*.dbf)' from the list and click 'Finish'. The 'ODBC dBase Setup' screen shown in figure 3 is displayed.

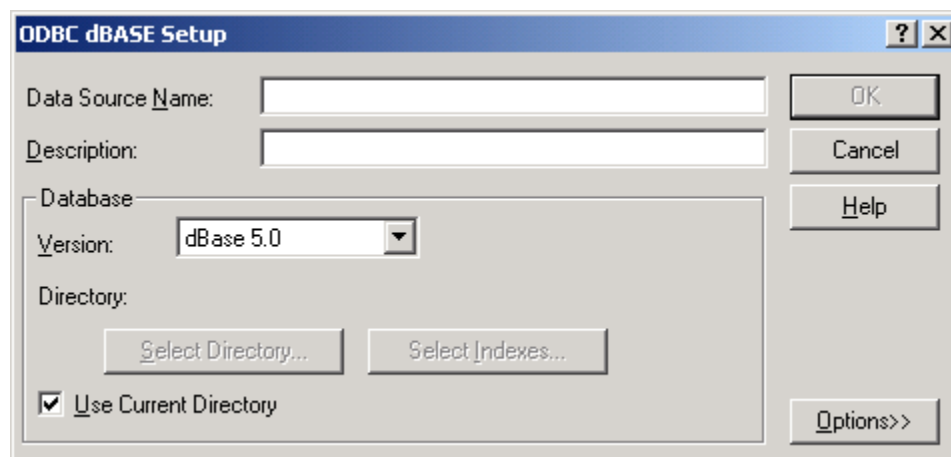


Figure 3

Enter a 'Data Source Name' and 'Description' for example GoldMine_Contacts, uncheck the 'Use Current Directory' box and click on the 'Select Directory' button. In the resulting 'Select Directory' screen shown in figure 4, navigate to the 'Common'

folder found in the main GoldMine? installation directory (c:\Program Files\GoldMine by default), and choose OK.

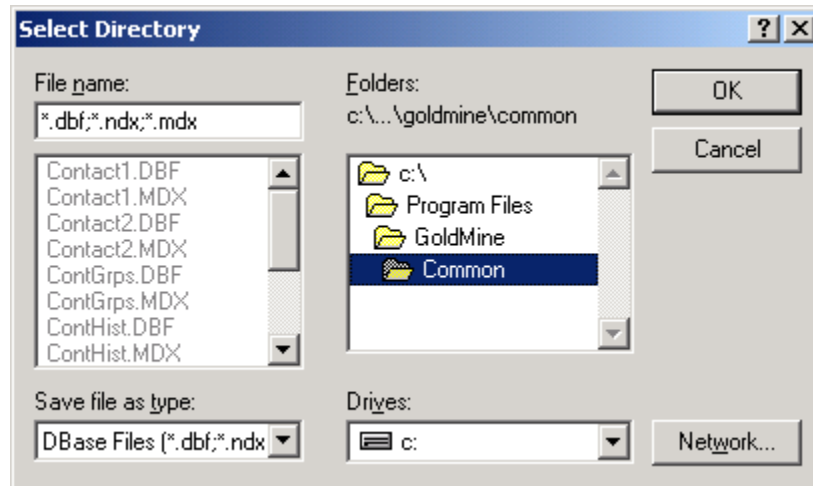


Figure 4

The 'ODBC dBase Setup' screen should now appear as shown in Figure 5. This tutorial is using GoldMine? version 6, however for earlier versions of GoldMine? it may be necessary to select 'dBase III' or 'dBase IV' from the 'Version' dropdown.

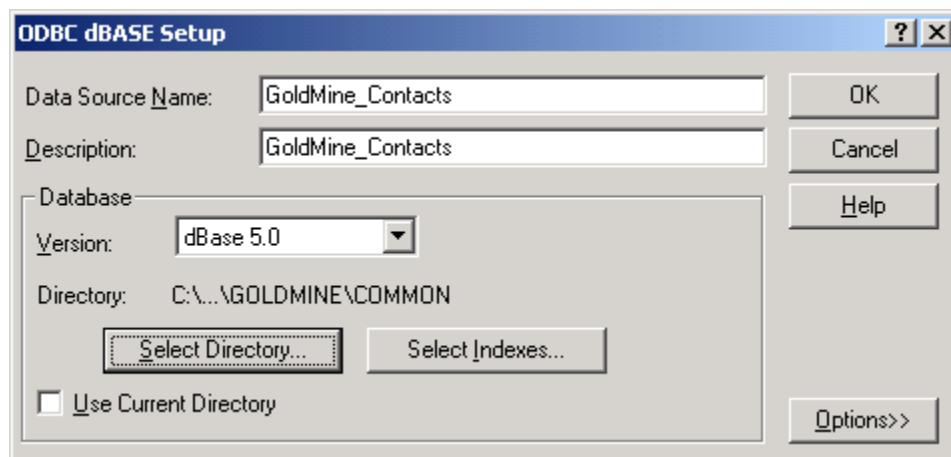


Figure 5

To complete the creation of the ODBC connection, select OK on the ' ODBC dBase Setup' screen and close the 'ODBC Data Source Administrator' application.

Step Three - Start the Database Import Plug-in

Close GoldMine?.

Start Group Mail, and select "Database Import" from the Plug-ins menu as shown in figure 1. If "Database Import" is not present then the plug-in will need to be installed, it is available for download to Group Mail Plus users in the "Customer Section" of the website [here](#).

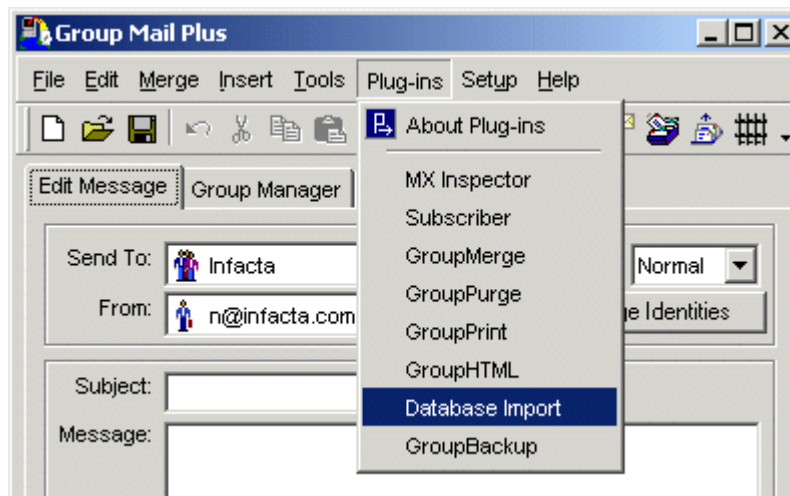


Figure 6

Step Four - Configure a Database Connection

The purpose of this step is to tell Group Mail where to get the data to import. To get Group Mail to import from GoldMine? it is necessary to create a database connection that uses the ODBC connection created in Step 2. To do this select the "New" button and the "Create a new Database Connection" screen is displayed (Figure 7), type in a descriptive name for the database connection.



Figure 7

Now press the 'Create' button and the 'Data Link Properties' screen shown in Figure 8 is displayed.

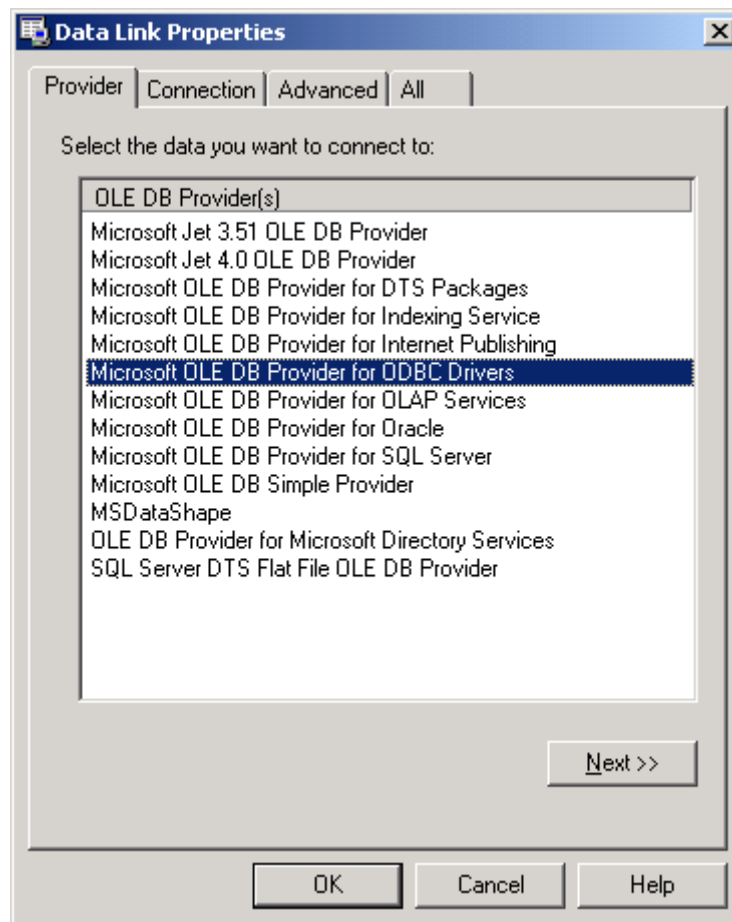


Figure 8

Select 'Microsoft OLE DB Provider for ODBC Drivers' from the list then choose 'Next >>' to move onto the 'Connection' tab.

In the 'Use data source name' dropdown list select 'GoldMine_Contacts', and in the 'Enter the initial catalog to use:' dropdown select 'C:\Program Files\GoldMine\Common' as shown in Figure 9.

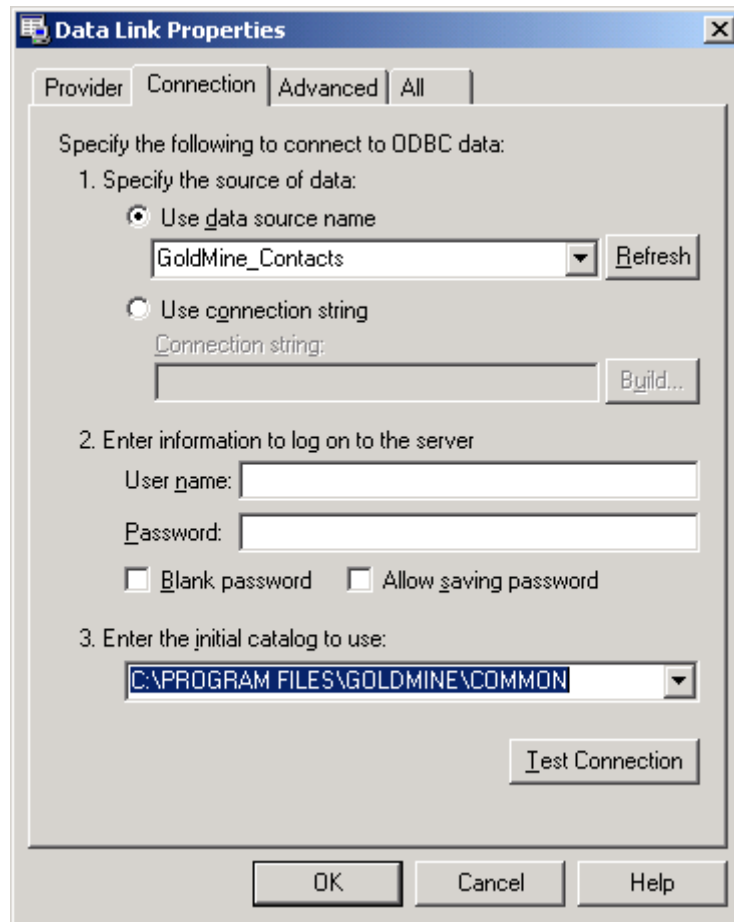


Figure 9

Select the 'Test Connection' button to verify that the connection to GoldMine? is functioning correctly.

Once the connection is correct, choose OK, and select OK from the "Create a new Database Connection" screen, the new database connection is now displayed in the list as shown below.

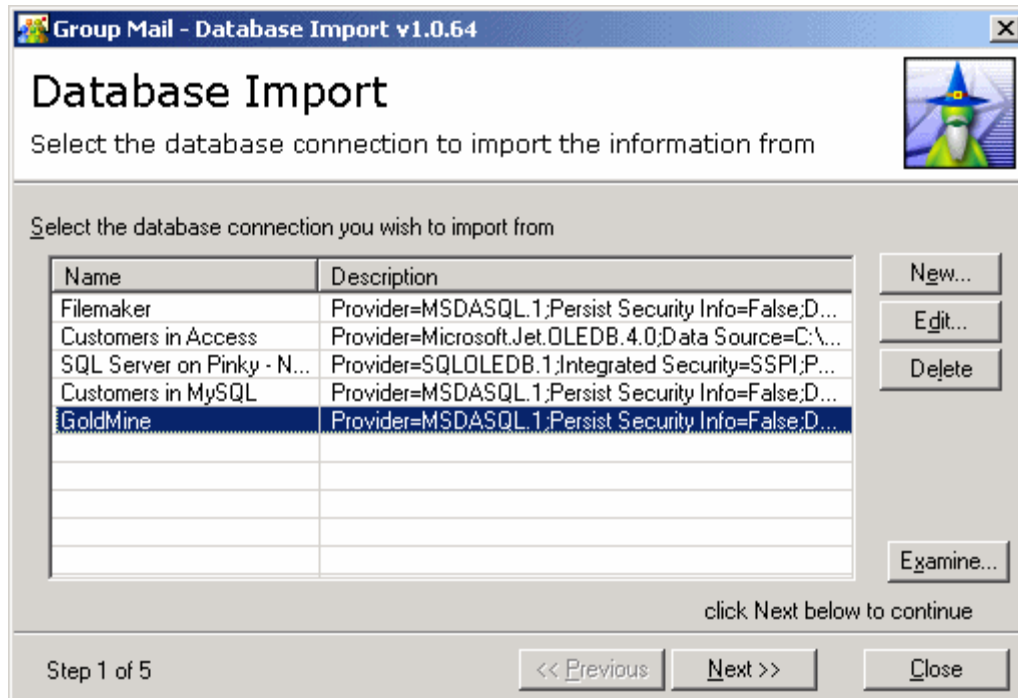


Figure 10

Select "Next" to proceed to the next step.

Step Five - Database Record Selection

The record selection step is used to identify the data to be imported from the database. In the example below, the Email Address, Contact Name and Company fields are selected for all Contacts in the contact1 table.

As the Contact Name and Email Address fields are stored in different Tables in GoldMine? it will be necessary use an SQL query to import these. Select the 'Advanced data selection and qualification' option and click on the 'Enter freeform SQL to generate your data set ...' button

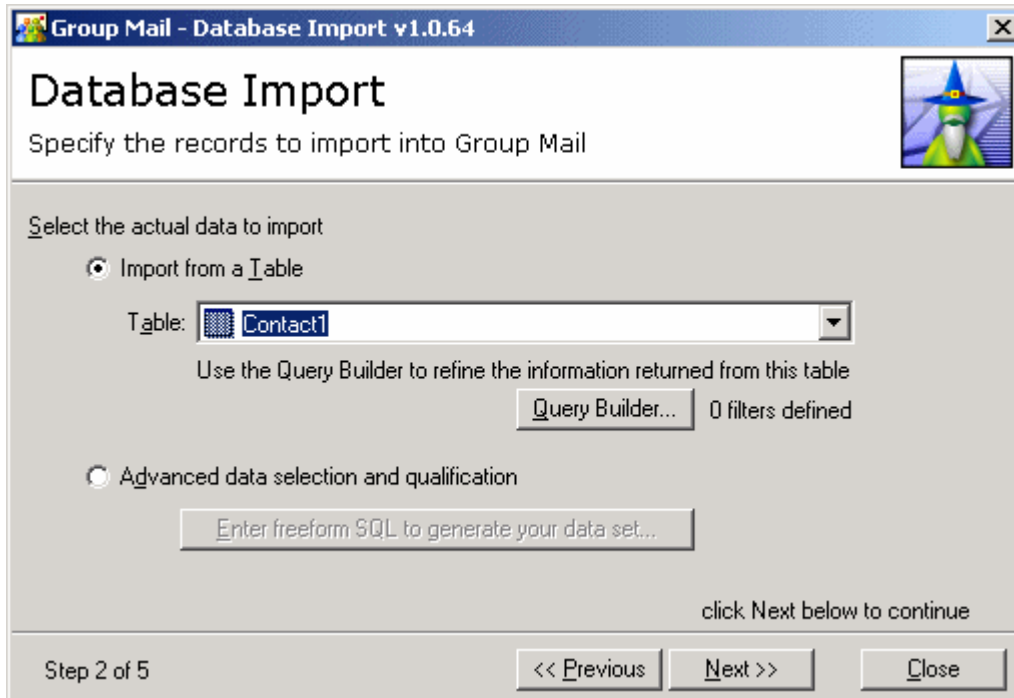


Figure 11

The 'Advanced Query' screen appears, enter the following SQL text all on the 1 line, where contact1 is the name of the GoldMine? database whose contact details are required.

```
select contsupp.contsuppref, contact1.contact, contact1.company from contsupp,
contact1 where contact1.accountno = contsupp.accountno and contsupp.contact =
'E-mail Address'
```

Click on the 'Check Syntax' button to verify that the SQL is correct, or 'View Results' to see the data returned by the query.

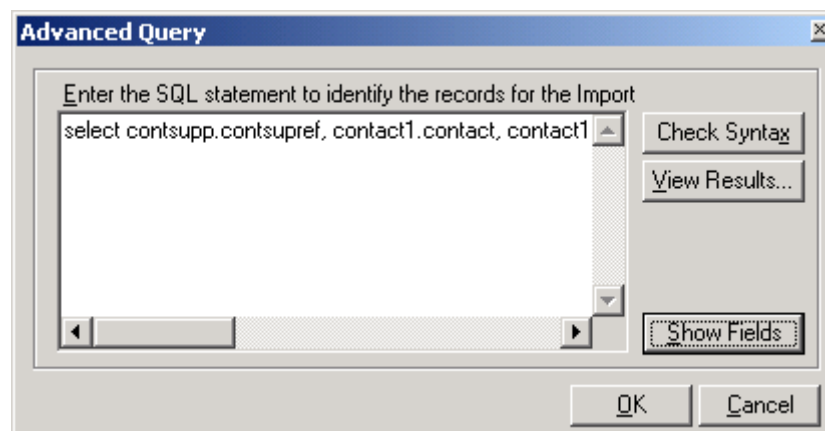


Figure 12

Click OK on the 'Advanced Query' screen, and then 'Next' to proceed to the next step.

Step Six - Match Database Fields to Group Mail Fields

When importing data from a database, Group Mail needs to know which fields are to be stored. In order to achieve this each GoldMine? field required must be selected from the dropdown list corresponding to the Group Mail field. The "Email Address" field is mandatory.

The "Full Name Macro" is a special case, and should be used where the contact name details are stored in one field. If selected, during the import the name data contained in the selected database field will be parsed and stored in the Group Mail "Title", "First Name", "Initial" and "Last Name" fields.

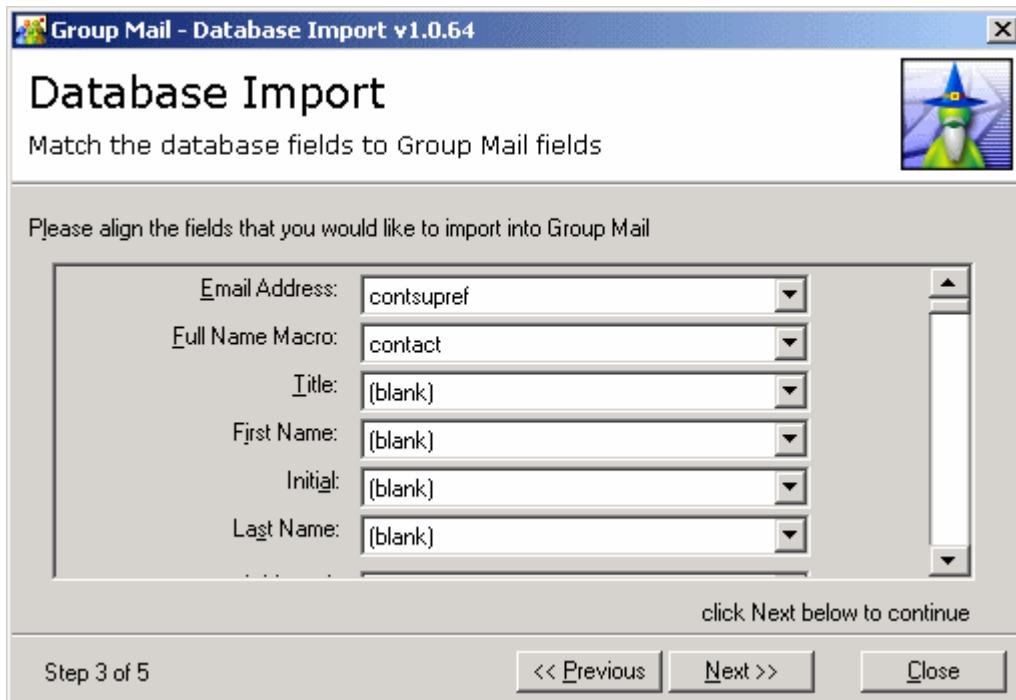


Figure 13

When all the required fields are selected, select next to move to the next step.

Step Seven - Select Destination Group

Now that the records to be imported have been specified, and the database fields have been matched to Group Mail fields all that remains is to select which group to store the data. An existing Group Mail group can be selected from the dropdown list or a new one created by selecting "Create a New Group".

Selecting the "Update existing recipients" checkbox will result in the Group Mail record being updated during the import when a duplicate record is found. By default duplicates are ignored.

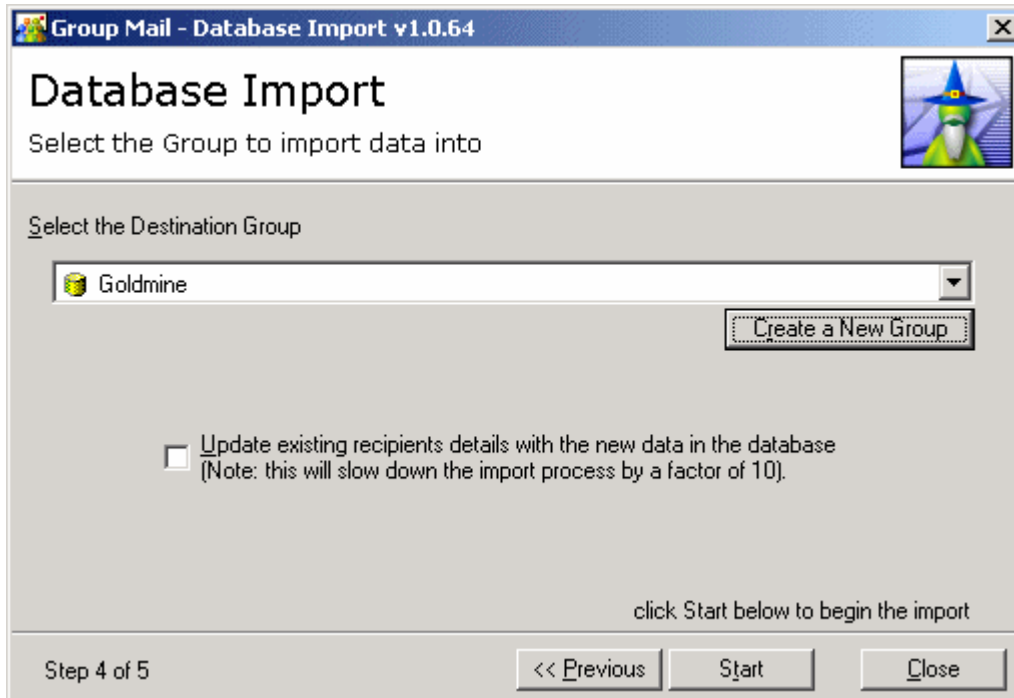


Figure 14

Click the "Start" button to start the import process.

Step Eight - Run the Import Process

Step 8 imports the records into Group Mail. During the import a number of counters are displayed -

- **Total Processed** - Displays the number of records processed from the import database.
- **Added** - Indicates the actual number of entries added to the group,
- **Duplicates** - Shows the number of duplicates found in the import, i.e. the number of email addresses that already existed in the group.
- **Illegal** - Prior to importing a particular record, some basic validation is performed on the email address, any email address failing this check is not imported.

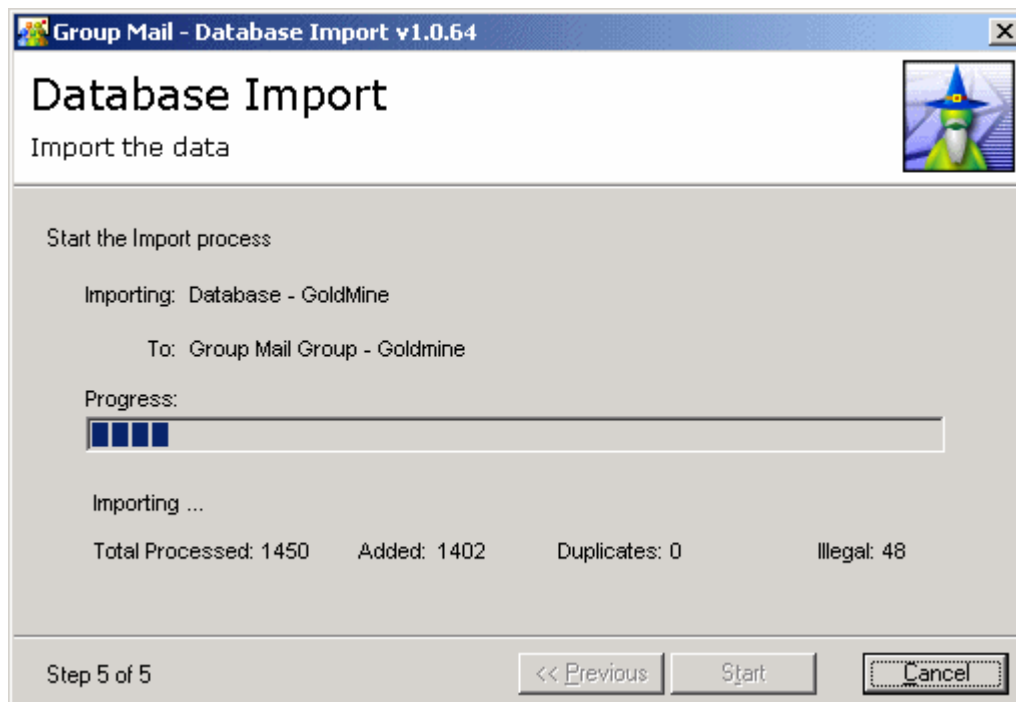


Figure 15

When the Import is finished you will be presented with a dialog that allows you to view a progress/status log. The log file will show you which records were not imported and why. Also it will detail those records which were updated or rejected (based on the Duplicate option described earlier).

You have now successfully completed importing your GoldMine? contacts into Group Mail !