



Introducing

GoldFORM

The GoldMine Web Import Form Wizard

Product Guide

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Introduction

Welcome to GoldFORM for GoldMine

The Powerful new Web Import Form build tool for GoldMine

A Web form is an HTML document for collecting information from a web site. The Web form allows users to type text and make choices from selection lists. You can design forms that meet your customer's requirements by combining many fields input types.

Using a Web form in conjunction with a script on a web server the submitted data from the form is processed and sent via E-mail.

When a person fills out a form and clicks Submit, the browser sends (or posts) the information in the form to the script or application running on the server for processing. The script processes the information passed from the browser to the server. The processed information can be sent back to the server, or, as with GoldMine's Web Import feature, sent by Email to a designated recipient which is then collected in GoldMine and will create a new record or update an existing record.

GoldFORM gives you the power to build **complex** web import forms for use with GoldMine, cut your web form development time by using GoldFORM to build your web form using the field labels, lookups and detail record information straight out of GoldMine

- See [what's new](#) in the latest release of GoldFORM
- Check out the [GoldFORM features](#)
- [Getting started](#), follow this quick guide

Using GoldFORM to build your forms and using our script on our server, the time and effort you put into building web forms will be dramatically reduced, allowing you to build an unlimited number of web forms with minimal effort and time.

Automatically uses the field labels, lookups and detail record information straight out of the GoldMine database it is attached to.

Build web forms which will work on any website, regardless of the type of web server

Stop Spam and Viruses by using GoldFORM to build your forms:

Having your email address on a web page or in web page coding is becoming increasingly more hazardous.

Spam mailing lists are now using automated email harvesters to collect email addresses for their lists. These harvesters trawl web pages for anything that looks like an email address and then simply add what it finds to their lists.

A related and more serious problem is email viruses and worms. The new generations of email viruses are designed to maximize their distribution. They do this by searching the host computer for email addresses both in email address books and local files. They then send themselves to these addresses and often appear to come from one of them. So if you have a web page containing your email address sitting on somebody's

computer (which happens as soon as they view your page) it can be found by viruses. This will result in not only you receiving a contaminated email but other email addresses found on the computer may also be sent an infected email appearing to come from you. This type of virus can make you appear to be the source of virus infected emails by faking the email from address.

To address this problem GoldFORM reduces this risk by making the data for the form unreadable by encoding it and so hiding this data from the harvesters and virus.

Other benefits & features.....

- Import data into Contact1, Contact2 and detail records.
- Pull in your F2 lookup lists from GoldMine and populate Drop Down lists and Radio list.
- Excellent duplicate checking against each web contact.
- You can build your Drop Down, Text Box, Check Box, and Hidden Fields with easy
- Save your web import profile and retrieve for modification at anytime, if your needs change on your form, just load up the profile make your changes and re-build your form.
- Add up to 3 Automated Processes to each web form you build.
- Apply Mandatory Fields where and when you need them.
- No coding needed at all, the forms work the minute you build them.
- Produce your own web templates for use in GoldFORM, just by following the guidelines.
- Profiles storage file is portable to other installations of GoldFORM.
- Resolves GoldMine's Web Import truncating the Email Address to 35 Characters.
- Resolves GoldMine's Web Import truncating the Website Address to 35 Characters.
- Ensure the new contacts Email Address is set as Primary.

Getting Started Guide

What can you do in GoldFORM

- **Toolbars and Menus**
Easy Navigation in GoldFORM
- **Top Toolbar and Menu Selections**
 - **New Profile**
Start a new profile, clearing all previously entered profile settings.
 - **Load Profile**
Load the details of a previously saved form profile.
 - **Close Profile**
Really just the same as using: **New Profile**.
 - **Save Profile**
Save the details of a form profile.
 - **Save As Profile**
 - **Build Form**
Using a saved Profile you can build the final HTML web page
 - **Settings**
Alter your GoldFORM settings, including the GoldMine integration settings
 - **Check for Update**
Check for new versions of GoldFORM from our server and automatically update required files.
- **Profile Entry Toolbar**
GoldFORM builds web import forms from your supplied selections and lists we call these profiles.
 - **Important Data**
This is the very important information that is needed for your web form to function correctly including which GoldMine user to notify for new records and also up to 3 Automated processes (Tracks).
 - **Standard Fields**
Here you will select which fields you would like from the main record fields, e.g. Company Name, Contact Name etc.
 - **Additional Fields**
These are the key fields and notes field you may wish to include.
 - **User Defined Fields.**
This section allows you to choose up to 12 of the built in Default User fields GoldMine offers.

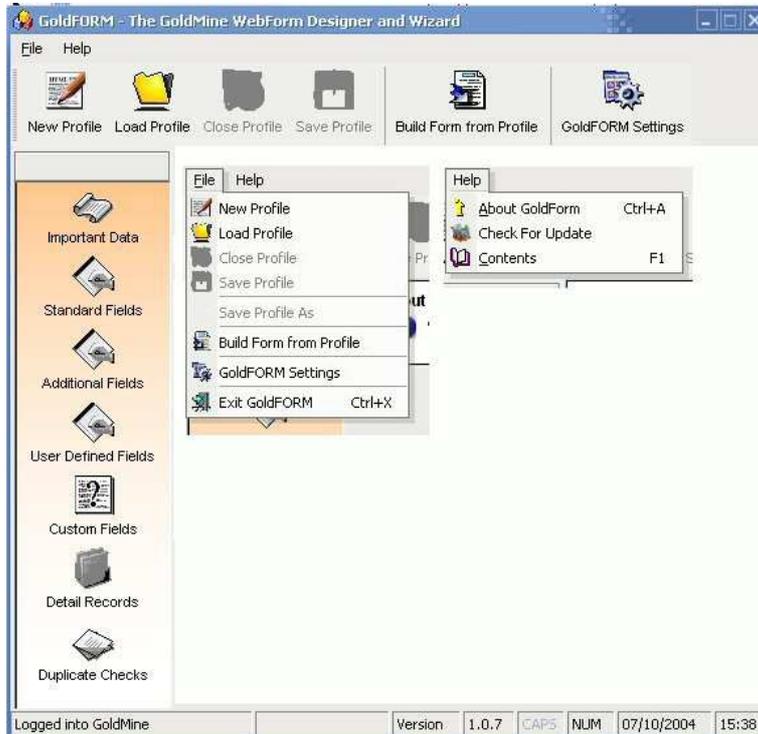
- **Custom Fields**
In this area, you may select up to 150 Custom User Created fields.

- **Detail Records**
You are allowed to include up to 7 Detail records including the 8 extra fields on those details records

- **Duplicate Checks**
Specify here which 3 fields to use to check if the incoming record already exists within the GoldMine database, and if the contact is a duplicate which GoldMine user to notify

1. Getting Started Guide – The Toolbars and Menus

GoldFORM uses menus and Toolbars to give the user access to the key areas of the Application.



The Top Toolbar allows you quick and obvious access to the basic functions of GoldFORM. These are duplicated on the File menu

1.1 Getting Started Guide – New Profile

New Profile Details



When you select “New Profile” or “Close Profile” you will be prompted to save any modifications made to your profile if you have one open and which has been changed. Basically all New Profile does is clear down any entered information ready to create your new Web Import Form profile.

1.2 Getting Started Guide – Load Profile

Load Profile



Here you will see a list of any saved profiles; every aspect of a web import profile will be stored so you may re load at anytime to make modifications. Select which Profile you wish to load and click the load button or double click the profile from the list.

You can also delete a profile from this area; you will be prompted for confirmation before the profile is deleted

WARNING: Deleting a profile cannot be undone.



You will note that the Date and Time the Profile was created and Amended are shown as you select each profile from the list

1.3 Getting Started Guide – Save and Save As Profile

Save and Save As Profile



Once you have built your web import form profile you will want to save your settings so you can build it and at a latter date maybe alter it for new fields or dropdown items.

Here you will see a list of any previously saved profiles; when you select save and you have altered a loaded profile you do not need to select which profile you are saving, if you select a profile other than the loaded profile GoldFORM will prompt you to overwrite the profile already stored, you can type a new name if you wish, this is just like using Save As, Save As just sets your cursor at the New Name area.

WARNING: Overwriting a profile cannot be undone.



You will note that the Date and Time the Profile was created and Amended are shown as you select each profile from the list

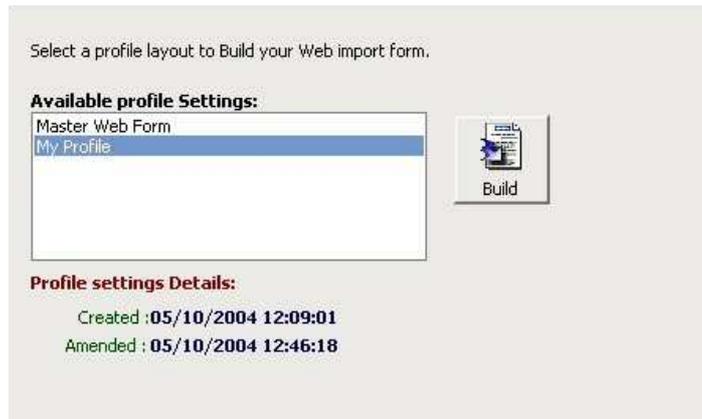
1.4 Getting Started Guide – Build Form from Profile

Build Form from Profile



Once you have built and saved your web import form profile you can build it here

Just like Save and Load profiles you will select and click build or double click your previously saved profile from the list to access the build section. See **Building Your Form**



You will note that the Date and Time the Profile was created and Amended are shown as you select each profile from the list

1.5 Getting Started Guide – GoldFORM Settings

GoldFORM Settings



Some basic settings and options are located in the Settings page this includes the GoldMine integration parameters necessary to retrieve data from GoldMine while you build your form profile
See **GoldFORM Settings**

1.6 Getting Started Guide - GoldFORM Settings – Database Settings

Database Settings

GoldFORM stores your profiles in an Access database file on your local hard drive, this file by default is named GoldFORM.gfc it cannot be opened in Access as it is password protected and can only be used with GoldFORM.



From time to time if you add new profiles, delete old profiles and update existing profiles the database file will grow larger, even if you delete profiles the file size can steadily increase. It is a good idea from time to time to use the Pack option on the settings page, just click the button and wait for GoldFORM to tidy up.

You will also see some information about the profiles database file, specifically the path to the database file, the date it was created, current file and comments.

You can create new profile databases if you would like to archive old profiles away or have multiple databases for different reasons.

By default you are not able to create a new database file; you will need to add an entry into the GoldFORM.ini file to switch this feature on.

To turn on this ability simply close GoldFORM, locate the GoldFORM.ini file found in the GoldFORM installation directory “C:\Program Files\GoldFORM”, Open this file in notepad and add the following line under the “[General]” section:

Advanced=True

E.g.:

**[General]
Advanced=True**

Now restart GoldFORM and go to the settings page, you will see that the “New” button and the Path area are now available,

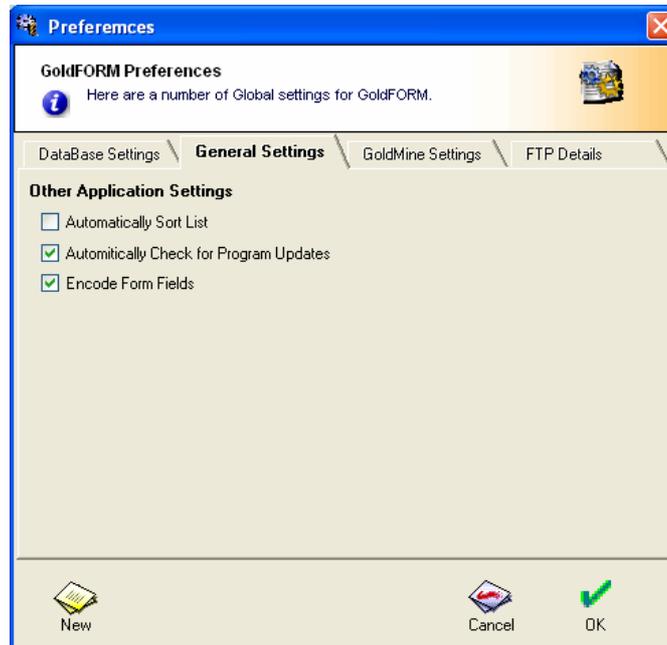
You can attach to an existing GFC file if you wish by typing in the path or using the browse button.

Important Note: Your GoldMine settings are also saved in the Profile database file, so if you do use more than one profiles database you will need to make sure your GoldMine integration settings are correct in each one. When you create a new one your current settings will be saved into the new database. ANY passwords used for GoldMine access or FTP are encrypted.

1.7 Getting Started Guide - GoldFORM Settings- General Settings

General Settings

On this page we will put any general settings, at present there are only three



- [Automatically Sort Lists](#)
This option will instruct GoldFORM to sort any Dropdown or Radio lists entered or pulled from GoldMine automatically.
- [Automatically Check For Program Updates](#)
This option will cause GoldFORM to check our server for any new program updates every 5 Days when you launch GoldFORM.
- [Encode Form Fields](#)
This option will instruct GoldFORM to encode the form fields when building the form. Encoding is some simple obfuscation but is a good way to combat the spam bots

1.8 Getting Started Guide - GoldFORM Settings- GoldMine Settings

GoldMine Settings

On the GoldMine settings page there are a number of pieces of information we require to allow the integration to work



To enable GoldMine integration you will need to tick “[Integrate with Local GoldMine](#)”, doing this will enable the GoldMine settings on this page.

Paths

GoldFORM needs to know the location of your GoldMine folders, if you have GoldMine already open then if you click the button labeled “[Click to transfer settings from running GoldMine](#)” GoldFORM will fill in the paths and contact used by your current GoldMine.

Just supply the password and test by clicking “[Login](#)”

If you wish you can browse for these locations manually, and you may also choose a contact set from the list if you successfully retrieved from GoldMine.

Once you have successfully logged in you will notice

- [Unload](#)
Log back out of GoldMine, click this if you wish to alter the paths or contact set you wish to use.
- [GM.INI Update](#)
Click this button to open a screen where you can update the GM.INI file of GoldMine and specify some important settings to control how duplicate contacts records are dealt with, this button will only become available if the user name you specified has master rights.



Type **I Want To Allow Fields To Be Updated By WebImport** in the text box if you want web imports for existing contacts to update information in your GoldMine database.

Fields that can be updated: Select the fields that are allowed to be updated by the Web Import

Just click Save once you are complete.

- [Refresh GoldMine Fields](#)
- [Automatically use GoldMine Field Names](#)
This option will instruct GoldFORM to use the field name in GoldMine automatically, eliminating the need for you to click on the Get Field Name button on most of the field selections
- [Automatically Retrieve GoldMine Lookup Lists](#)
Using this options will cause GoldFORM to populate the DropDown/Radio lists page with the F2 lookup data from GoldMine when you select “Build” and there are no entries already entered.
- [Validate User Defined Fields on Entry](#)
Set this option to check any manually typed custom fields exist in GoldMine as you enter them.
- [Automatically Use Detail Record Field Labels](#)
When using Detail records and you show the Tabs entry window, GoldFORM can show the field names as the field names in GoldMine if you have changed them in GoldMine.

1.9 Getting Started Guide - GoldFORM Settings- FTP Settings

FTP Settings

If you supply your FTP details here, GoldFORM will be able to FTP you form to your web server automatically.



The screenshot shows the 'GoldFORM Preferences' dialog box with the 'FTP Details' tab selected. The fields are filled with the following information:

- FTP Server Address: ftp.goldmineforms.com
- User Name: [Redacted]
- Password: [Redacted]
- Remote Folder: /usr/local/home/httpd/vhdocs/goldminefo
- Port: 21
- Passive mode is selected (radio button).

Buttons include 'Save', 'Browse', 'Test Connection', 'New', 'Cancel', and 'OK'.

FTP Server address

This is your web server FTP address or IP address of your web server. If you do not wish to FTP just leave this field blank. If you supply an FTP address here, once your form is built you can then FTP to your server just by clicking the FTP button

User Name

The User name required here is your FTP user name. When this setting is stored it is encrypted to ensure security.

Password

Supply the password needed to log into your web server. The password will be encrypted when saved to ensure security. If you choose not to supply your password along with **Save** GoldFORM will prompt you to enter your password when you start the FTP process.

Browse

Click this button once you have supplied the above details to select the remote folder location you wish to upload any of your forms to.

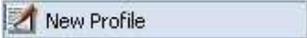
Test Connection

Once you have supplied the above information you can click this button to ensure GoldFORM can communicate correctly to your Web server.

2. Getting Started Guide - Using GoldFORM – Selecting your fields

2.1 Building your first Web Import Profile

Let's build your first web import profile with GoldFORM.

Begin by clicking on the  button.

GoldFORM will begin by ensuring any previous entries are saved or cleared then place the cursor at the first part of the “Important Data” page.

You do not have to fill in and select the fields in any pre-defined order, but you must select a valid recipient address before you can save the profile.



2.1.1 Which E-Mail address will the Web Import be sent to:

This field is an important field and you **must** make sure you supply a valid authorized Email address.

When you deploy your form and a user submits their details via your form, the web form will contact our servers to process the responses, it will validate the Email addresses domain portion entered here with a list of authorized user's domains on our server. If the domain portion is not authorized then it will send the import result to the address but using our demo mode options, which will include a demo message in the web import mail and also will only, be allowed to send up to 20 web imports to that domain.

The reason we have to authorize the use is to stop abuse of the script and to only allow our customers the rights to use our servers.

Once the domain is authorized you may use any email address for that domain as you wish. It only takes a few minutes to activate a domain, once we receive notification.

2.1.2 Which URL will be displayed after the form is submitted:

Here you need to specify the URL of your thank you web page, this is the location to send the browser to thank the user for submitting the form if the form submission was successful.

It is important you supply a URL to a valid page here otherwise you will get our default response page,

For Example:

<http://www.yourdomain.com/thankyou.html>

2.1.3 Which GoldMine user is notified of new contacts:

You enter here the GoldMine user name to which an internal GoldMine Email will be sent to telling them of the new contact record when it is created in GoldMine.

If you have integrated to GoldMine correctly then to the right of this field is a button you can press to bring up a GoldMine users list select screen. E.g.



2.1.4 Mandatory Fields

As part of the templates supplied we have included some basic java code for field validations if you wish to use this code to validate the fields that are set to mandatory entry just select *“Use Java Code within form”* This will set the web form to validate the mandatory fields with this java.

If this is not required then select *“Redirect to URL if Mandatory fields are incomplete.”* And specify the URL to the missing field’s web page. Remember to ensure the http:// is specified in this URL

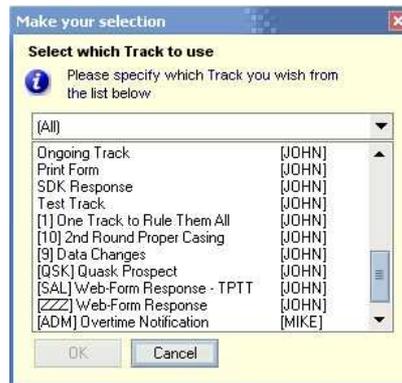
For Example:

<http://www.yourdomain.com/missingfields.html>

2.1.5 Automated Processes

Here you may specify up to 3 Automated Processes to attach to the record after the import happens in GoldMine, these are also known as “Tracks”. The Web form needs to know the exact name of the Track to attach. The same track will be attached to both a new contact and a duplicate contact record at this time.

Like many other fields in GoldFORM if you have integrated to GoldMine correctly then to the right of this field is a button you can press to bring up a GoldMine Automated Processes list select screen. E.g.



Automated processes can be a very important and powerful part of GoldMine to help you to get even more out of your imported web contacts.

For example when a contact comes into your system you could have an Automated Process that updates any addition fields / create a history entry or calendar entry, send back a formatted email confirmation message and then schedule a call back.

2.2 Select which fields to include on your form - Standard Fields

The primary fields are the main contact1 fields, the most common fields in GoldMine, and these include the company name, contact name, Address fields and phone number to name a few.

Most fields list on the following pages allow you to right click the fields selection box to access additional information about the field, at present this only allows setting the Mandatory flag for the given field, if a field is set to mandatory then the field name selection will become bold and once the form is built the mandatory list will hold these fields to ensure completion.

In a future version we plan to add field validation to enable Numeric, Date and text entry validations along with mandatory entry validation.

2.2.1 The Primary Fields

It is required that you select which of the primary fields you wish to gather information for on your web form. There are 2 pages on this screen due to the number of fields that are allowed, just select the **Main Primary Fields** or **More Primary Fields**

Field	Field Style	Field Label or Hidden Value
<input checked="" type="checkbox"/> Company	TextBox	Company ..
<input checked="" type="checkbox"/> Contact	TextBox	Contact ..
<input type="checkbox"/> Department		
<input checked="" type="checkbox"/> Title	DropDown	Title .. Build
<input type="checkbox"/> Secr		
<input checked="" type="checkbox"/> Lastname	TextBox	Last Name ..
<input checked="" type="checkbox"/> Dear	TextBox	Dear ..
<input checked="" type="checkbox"/> Address1	TextBox	Address1 ..
<input checked="" type="checkbox"/> Address2	TextBox	Address2 ..
<input checked="" type="checkbox"/> Address3	TextBox	Address3 ..
<input checked="" type="checkbox"/> City	DropDown	City .. Build

When you select a field to be included on your form, it will allow access to the “**Field Style**” and “**Field Label or Hidden Value**” sections. The “**Field Style**” selection is a list of available styles for that fields appearance on your final form, these are:

TextBox

A basic single line text entry field, this field allows free text entry and has no validation apart from the field length; the field length used will be the same as the GoldMine field length, or a default if GoldMine integration is not enabled.

DropDown

A dropdown field, here is where you can select from a pre-defined list of values. Selecting this style will show a new button to the right of the entry; “**Build**” pressing this button will open a build screen where you can build your dropdown list. If the list is being built for the first time or is empty you may get prompted to use a default list.



We have supplied a number of default lists for use in GoldFORM, and these can be overridden with your own lists or more added for other fields. [See Default Lists Section](#) for further details



This screen simply allows you to add and remove items from a list which the corresponding field will use, the first item in this list is generally the first item selected on your form when deployed. You can sort this list manually by clicking “Sort” and you can drag items up and down the list using the mouse by selecting the item and dragging it up or down the list. Enter the item to add in the text box under “Items List” and hit return or click the “Add” button.

To delete an item, select it, then click “Delete”, you may also click “Clear” which will erase the list completely.

The list can automatically be sorted if you select this option from the preferences page, you can also pull the F2 lookup list from GoldMine if GoldMine has successfully been integrated and enabled. The F2 lookup can also be pulled in automatically by setting the option in the preferences.

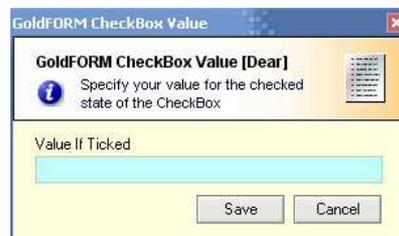
Clicking Save will store the list items for your profile, and will be saved along with the profile.

Radio Button

A Radio Button list is similar to a DropDown list in the respect that you provide a list of available selections, but the results of this list are shown as Radio Buttons, This sort of field is used mostly for a small list of options.

CheckBox

A Check Box is a single check box entry, if selected then the resulting value entered using the “Build” will be submitted with the form, if not selected then nothing is submitted.



You need to supply the Checked Value to return in your web import.

Hidden

A hidden field is a field which will not be shown to the person filling out the form, select "**Hidden**". Then enter the information you wish to have entered into the resulting GoldMine contact record in the "**Field Label or Hidden Value**" text box. No field will appear on your form, but the information you entered will populate the selected field in GoldMine.

"Field Label or Hidden Value"

Here you need to supply the Label shown on the form next to the entry, if the selected field is set as "**Hidden**" then enter here the data you wish to have placed in this field when the contact record is imported.

Also Like other fields in GoldFORM if you have integrated to GoldMine correctly then to the right of this field is a button you can press to pull in the fields label from GoldMine. This can be done automatically is the option is set in the GoldFORM preferences page.

Select All

Tick this to select all Primary fields on this page

Get Field Names from GM

This button is of more use if you have not set the Automatic field labels option in the GoldFORM preferences page and you want all the field labels taken from GoldMine, it will enter all the GoldMine field labels only for the given page.

2.2.2 Select which fields to include on your form - Additional Fields

In this section you can select any additional fields for your form; these include the 5 Key fields, web address, Email address, notes and source. Although you can choose to not include the Email field it is highly recommended you always select it.

Along with the notes field there is an option called “PowerNotes™”

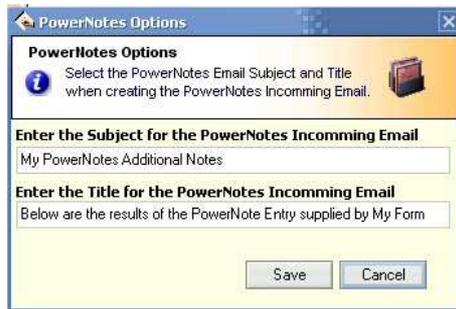
The standard notes field import restricts the amount of text you can collect to approx 255 characters into the notes tab, there is also another restriction in that with importing text to the notes field you also cannot use carriage returns, due to these limitations in GoldMine, when using our script the carriage returns are converted to “ - ” to ensure nothing is lost, it is also recommended by many to never use the notes field in GoldMine for anything important.

Because of the above limitations PowerNotes™ is a very powerful feature of GoldFORM and allows you to collect an unlimited amount of additional text by sending an additional Email with the results of the Notes field attached to it which is then automatically linked to the new GoldMine record when it is imported.

This additional Email will by default include the results of some of your form fields. E.g.

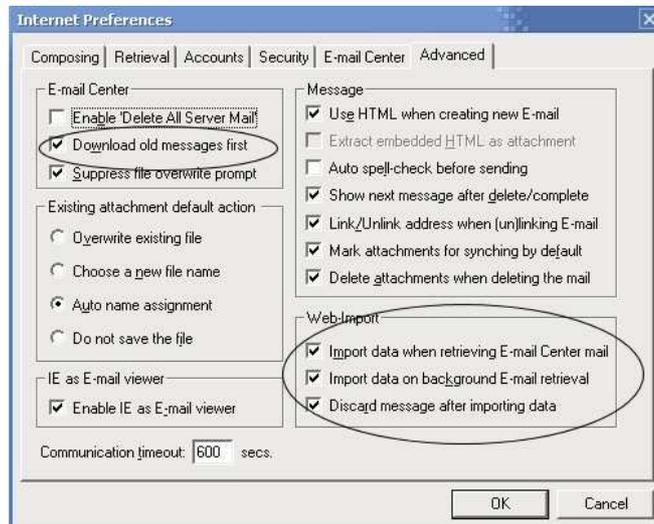
Company Name
Contact Name
Phone1

The PowerNotes Options button will allow you to select the Subject and Title fields of the PowerNotes email



GoldFORM will use a default “**PowerNotes Additional Notes**” for the Subject and “**Below are the results of the PowerNote Entry supplied for your Form**” and you can override them here.

When using PowerNotes™ it is also important to have GoldMine’s Email collection settings correct to ensure the PowerNotes™ Email is collected after the web import Email, otherwise GoldMine will not be able to link the Email to the newly created contact record.



Above you will see the settings page from GoldMine and the settings that should be set to ensure correct operation of web import and PowerNotes collection.

2.2.3 Select which fields to include on your form – User Defined Fields

Since GoldMine 6.0 a fresh install of GoldMine allows up to 16 pre-created User Defined fields for you to use, these fields are called USERDEF01 to USERDEF16, older versions of GoldMine prior to 6.0 only have 10, we have allowed 12 in GoldFORM because we realize, while some people may wish to use these fields, most will be using Custom created fields because they allow a higher flexibility.

	Field Style:	Field Label or Hidden Value:	
<input checked="" type="checkbox"/> UserDef01	CheckBox	Vat Registered?	Build
<input checked="" type="checkbox"/> UserDef02	Radio Button	My Own Field	Build
<input type="checkbox"/> UserDef03	TextBox		
<input type="checkbox"/> UserDef04			
<input type="checkbox"/> UserDef05			
<input type="checkbox"/> UserDef06			
<input type="checkbox"/> UserDef07			
<input type="checkbox"/> UserDef08			
<input type="checkbox"/> UserDef09			
<input type="checkbox"/> UserDef10			
<input type="checkbox"/> UserDef11			
<input type="checkbox"/> UserDef12			

Version 1.0.5 CAPS NUM 05/10/2004 12:36

The User Defined fields selection work in exactly the same way as the Primary fields, Select which field to include, select the Style and select the Label or hidden field value. Also you can select the label from GoldMine, and build a Dropdown or Radio list.

2.2.4 Select which fields to include on your form – Custom Fields

Here you can select to include your own custom created fields. Using this section you are presented with a grid where these fields are shown, you can add, remove, edit and move fields in this area. If integrated to GoldMine correctly, just like everywhere else, you can pull the fields you wish to use directly out from GoldMine. You can select the field style, label or hidden value and even build any Dropdown lists or radio buttons like any other field in GoldFORM.

While technically there is no limit to the number of custom fields you may add to GoldMine, there is a known limit of 233 fields before problems can arise in GoldMine.

We have imposed a limit of 150 custom fields on any form you may make, only due to the fact that it is highly unlikely you will ever have any more than 150 custom fields in conjunction with the primary fields, this is mainly because having too many fields will make your forms unfriendly to use. If in the future this needs to change we can increase this limitation.

Field	GoldMine Field	Field Style	Label or Hidden Value	Mandatory
1	UACCMAN	TextBox	Origin	<input type="checkbox"/>
2	UBANKACCT	TextBox	Account No	<input type="checkbox"/>
3	UCALLME	TextBox	Require Call Back?	<input checked="" type="checkbox"/>
4	UCLOSENUM	TextBox	Close Number	<input type="checkbox"/>
5	UCOURSE	Radio Button	Course	<input type="checkbox"/>
6	UCREDITLMT	TextBox	Credit Limit	<input type="checkbox"/>

Click “Add New” to start adding a new Custom Field to the list, you will then need to type in the custom field name, (Field Style “TextBox”, “Dropdown”, “Radio button”, “Checkbox” or “Hidden field”), the Label or Hidden Value and whether the field entered is mandatory.

Selecting “Dropdown, Radio button or Checkbox” will enable the “Populate List” button, clicking this button will bring up the List build dialog the same as other fields.

If you enter a field name without the preceding “U” GoldFORM will add this for you

If integrated to GoldMine correctly you will see a “Select GoldMine Fields” button, click this button and you will be shown a list of all the fields from GoldMine that you may use, Any previous fields you have already selected or entered will automatically be ticked.



Using this dialog you may also select the field style from the Dropdown list, to build the Dropdown, Radio button or checkbox, select “Save” and use the main screen to perform this.

2.2.5 Select which fields to include on your form – Detail Records (aka Profiles)

Another major improvement over the built in GoldMine web import wizard is the ability to create detail records using your forms.

GoldFORM allows you to build up to 7 Detail records with the ability to also include the 8 extended fields on a detail records “**Info Tab**”, Unfortunately GoldMine’s web import feature imposes a limitation of 9 but this includes 2 records already built in, 1 is the Email address and the other is the Website field as these are recorded in GoldMine as Details Records

Detail	Field Style	Info Tab	Detail Name	Field Label or Hidden Value
<input checked="" type="checkbox"/> Detail 01	TextBox	Info Tab	Buying Guide	Buying Guide
<input checked="" type="checkbox"/> Detail 02	Hidden	Info Tab	Account Details	Bank Account
<input type="checkbox"/> Detail 03				
<input type="checkbox"/> Detail 04				
<input type="checkbox"/> Detail 05				
<input type="checkbox"/> Detail 06				
<input type="checkbox"/> Detail 07				

After selecting your Detail record field, choose a field style and enter both the “**Detail Name**” and the “**Field Label or Hidden Value**”.

The “**Detail Name**” field is required and will be included on the form as a Hidden field. This entry tells GoldFORM which detail record you are creating in GoldMine, you can type in any Detail record name you wish or select it from a list of Detail records you have already created already in GoldMine using the button next to the Detail Name entry field.

Select which Detail Record to use

Please specify which Detail Record you wish from the list below

- Password
- Policy
- Quask
- Quotespeed
- Quotewerks
- Serial Number
- Software License
- Support Reference
- Tenfore API
- Tradestation 2000i
- Web Site
- Wholesale Data

OK Cancel

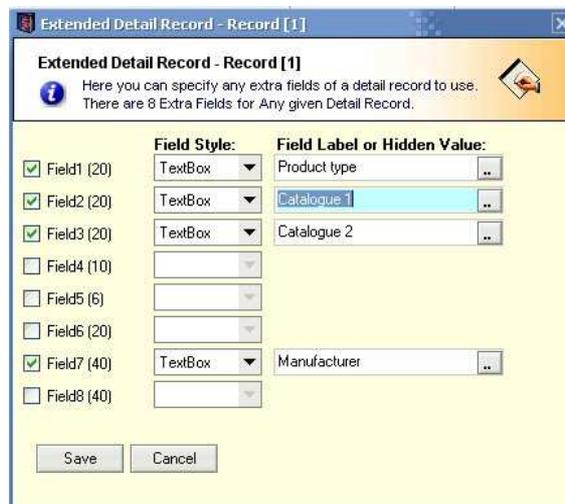
The “**Field Label or Hidden Value**” is the field entry the form will collect and place into the Details Reference field in GoldMine.

NOTE: if the data supplied on the form exceeds the 35 Character limit then the Reference field will be updated with “See Notes” and the data supplied will be entered into the Notes field of the record.

If you choose to select the Field Type as “Hidden” then if the Detail Name is found in GoldMine clicking on the [...] button will show you a list of valid F2 lookup entries for that Detail Name. You may also manually type your own value.



Once you have selected these you can select the “**Info Tab**” to enable you to collect data for the Detail records extended fields, just like in GoldMine this is the 8 Fields on a Detail record that you can use.



The fields on this dialog act exactly the same way as other fields, you can select the field to use, choose its style and supply the Label or hidden value, and you can include a Dropdown list or Radio or Checkbox and build those lists just like other fields. You can get the GoldMine’s field label from GoldMine if the Detail Record entered or selected is found in GoldMine. Just make your selections then click “**Save**” to continue.

2.3 Select which fields to include on your form – Duplicate checks

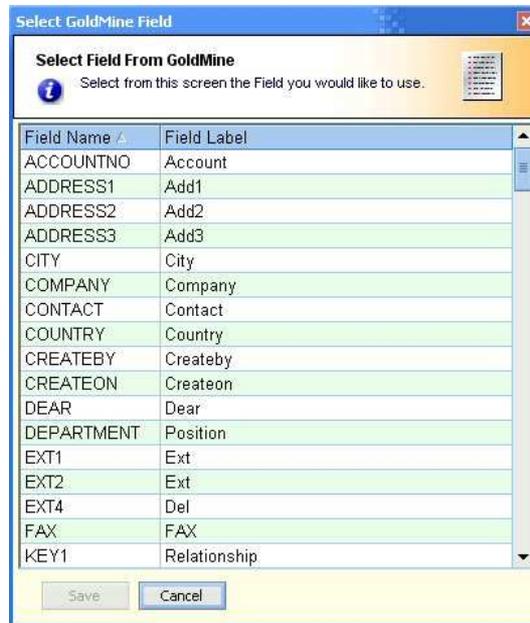
The final area is the Duplicate Checks page, on this page you have 3 default main fields, 2 Own choice fields, it is important that if you want to perform a duplicate check when the record is imported at least 1 field must be one of the primary fields: - Company Name, Contact Name or Email Address.

The screenshot shows the 'GoldFORM Duplicate Check' window. At the top, it says 'Set up the Duplication Checks required. Duplicates can be checked for using up to 3 Fields, Select the fields required'. Below this, there are four checkboxes for field selection: 'Company Name' (checked), 'Contact Name' (unchecked), 'E-mail Address' (checked), and 'Own Choice Field' (checked). The 'Own Choice Field' is set to 'UBANKACCT'. To the right of the 'E-mail Address' checkbox is a 'Field Name.' label and a dropdown menu. Below the field selection is a section titled 'Which GoldMine User is to be notified of Duplicate contacts' with a dropdown menu set to 'DARREN'. Underneath is a 'Web Import Goldmine Password' section with a checkbox 'Use Web Import Password' (checked) and a password field containing 'mypassword'. At the bottom, there is a dropdown menu for 'Please Specify which version of GoldMine you will receive web imports into' set to 'Version 6.0 or Above'. The status bar at the bottom right shows 'Version 1.0.11 CAPS NUM 27/10/2004 10:59'.

You may only specify up to three fields, two of which may be custom fields. GoldMine uses the supplied fields to determine if the incoming contact record already exists in GoldMine, if the fields selected match the fields of the import data then the record is a duplicate. If the record is a duplicate it can update the matching records fields, but only if the GM.INI file has been modified to allow this. [See the GoldMine Preferences](#)

2.3.1 Select which fields to include on your form – Duplicate checks – Fields to Check

To the right of the “Own Choice Field” selections you can click on the [...] button to lookup a custom field from the fields in GoldMine if you have successfully integrated with GoldMine.



2.3.2 Select which fields to include on your form – Duplicate checks – User to Notify

You will also need to specify which GoldMine user to send a Notification Email to if a duplicate is found,

Enter here the GoldMine user name to which an internal GoldMine Email will be sent to telling them of the duplicate contact record when it is created in GoldMine.

If you have integrated to GoldMine correctly then to the right of this field is a button you can press to bring up a GoldMine users list select screen. E.g.



2.3.3 Select which fields to include on your form –Duplicate checks – Web Import Password

You should protect the Web Import process with passwords so only authorized incoming instruction files may be imported. This prevents unauthorized persons from sending e-mail messages and inundating a GoldMine system with unwanted data.

The **[WebImpPassword]** section must exist in the GM.INI file and your web import profile password must match one of the passwords defined there.

If a password is required, the instruction file is not processed if the incoming instruction file does not contain a password or contains an invalid password.

To require a password, create a **[WebImpPassword]** section in the GM.INI file. The **[WebImpPassword]** section contains a password list to test against.

Place the following settings in the **[WebImpPassword]** section of GM.INI file:

Passwordn=value

Where n represents the number of the password entry. The password can consist of up to 20 alphanumeric characters.

Each web import can contain only one password; however, the **[WebImpPassword]** section can contain multiple passwords, numbered from Password1 through Password999.

The following example includes a password list:

```
[WebImpPassword]
Password1=Yankee
Password2=Doodle
Password3=WentToTown
```

Once when you have completed the entry of your profile, save the profile ready to build.

2.3.4 Select which version of GoldMine the web import will be collected in

This selection tells the import script which version the web import is expected to be imported into, it only affects how the internal Email message is sent to the Duplicate notification user or the New Notification user, Versions of GoldMine prior to 6.0 perform this slightly differently so we have provided this selection to account for the variation.

You may choose between two options:

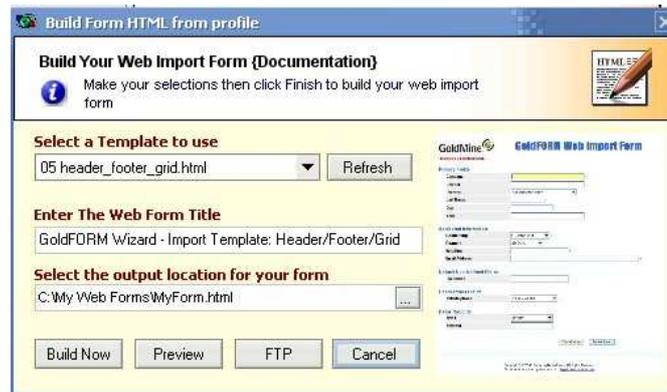
- Below Version 6.0
- Version 6.0 or Above – This option is the default.

3 Building your form

Building your web import form from your profile is very quick and simple.

Simply select the profile you wish to build [see Section 1.4 Getting Started Guide – Build Form from Profile](#)

Once you have selected the profile you wish to build you will be required to make a few selections.



3.1.1 Select a Template

Choose which of the supplied templates you wish to use, this will build you the basic form which you can later edit as required. GoldFORM will remember your selection.

As you select a template the preview will show a simulation of what the form will look like, this is not an accurate visualization but just an example.

3.1.2 Enter the Web Form Title

When you select a template the title will appear here, you may alter this title to be anything you require, GoldFORM will remember your selection.

3.1.3 Select the output location for your form

Choose where you would like the built form to be created. If the java and Style sheet provided with GoldFORM is not present in this location a copy of these will be created here also.

3.2 Build Now

Click this button to begin the build process, building is very simple, and the form will be produced quickly and written to the specified location. GoldFORM will prompt you to overwrite any form that already exists.

3.3 Preview

The preview button becomes available once your form is built and will launch your form in an explorer window so you can see the results. Once you are happy then you can publish the Form, Java and style sheet to your web site.

3.4 FTP

Once you have successfully built your form GoldFORM can upload the required files and your form to your web server automatically. You will need to supply your FTP details on the preferences page. See GoldFORM preferences – FTP Settings