

# GoldMine Mobile Edition Installation and User Guide

Version 9.0



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# Installation

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## Overview

GoldMine Mobile is a powerful tool designed to help manage your daily business activities. Maintain business relationships, manage time, establish and achieve goals.

The installation process for GoldMine Mobile involves several prerequisites (depending on your Windows Server version) and then installation of both GoldMine PE and GoldMine Mobile. This section provides an overview of the necessary steps to install and configure the various applications to get GoldMine Mobile running.

## Prerequisites

The prerequisites listed below are for specific versions of Windows Server. In addition to these prerequisites, you must also determine your required installation process (see ["Installation Options" on page 6](#)).

<b>Windows Server 2008 R2</b>	<ol style="list-style-type: none"><li>1. Internet Information Services (IIS) 7.5</li><li>2. Microsoft .NET Framework 4</li><li>3. GoldMine PE 9.0.3</li></ol>
<b>Windows Server 2008</b>	<ol style="list-style-type: none"><li>1. Internet Information Services (IIS) 7.0</li><li>2. Microsoft .NET Framework 4</li><li>3. GoldMine PE 9.0.3</li></ol>
<b>Windows Server 2003 R2</b>	<ol style="list-style-type: none"><li>1. Internet Information Services (IIS) 6.0</li><li>2. Microsoft .NET Framework 4</li><li>3. GoldMine PE 9.0.3</li></ol>

## Important Note Regarding IIS 6.0 and .NET Framework 4

If you install .NET Framework 4 before you enable IIS 6.0, you must run the ASP.NET IIS Registration tool to both register the .NET Framework with IIS and create application pools that use the .NET Framework 4.

1. Open the **Start** menu and select **Run**.
2. On the Run dialog box, enter **cmd** and click **OK**.
3. Change to the framework v.4x directory (e.g., **c:\windows\microsoft.net\framework\v4.0.303019**).
4. Run the asp.net registration tool (**aspnet\_regiis.exe -i**).

**NOTE:** The “-i” parameter updates the ASP.NET version of the IIS configuration at the root level; this works for GoldMine Mobile, but can cause other web applications running on earlier builds of ASP.NET to stop working. If this occurs, manually change the ASP.NET version for those applications using the IIS Manager.

## Installation Options

There are three basic installation options used for installing and configuring GoldMine PE and GoldMine Mobile. Within those options are different configurations regarding the database, the GoldMine Application Server, and the GoldMine Mobile Server. The following diagrams depict several variations of this scenario. For more information, refer the following topics:

- [Installation on a Local Server \(see page 7\)](#)
- [Installation in a Workgroup \(see page 10\)](#)
- [Installation in a Domain \(see page 14\)](#)

## Configuration

After you fulfill the prerequisites and complete the Installation on the selected Windows Server platform, the GoldMine Mobile web server and the GoldMine PE application must both be configured to allow access by GoldMine Mobile. These steps include the following topics:

- [Grant Access to the GoldMine Mobile Web Server \(see page 18\)](#)
- [Configure Alarm Messages for GoldMine Mobile \(see page 19\)](#)

**NOTE:** If you receive error messages after completing the installation and configuration, refer to "[Error Messages Troubleshooting](#)" on page 21.

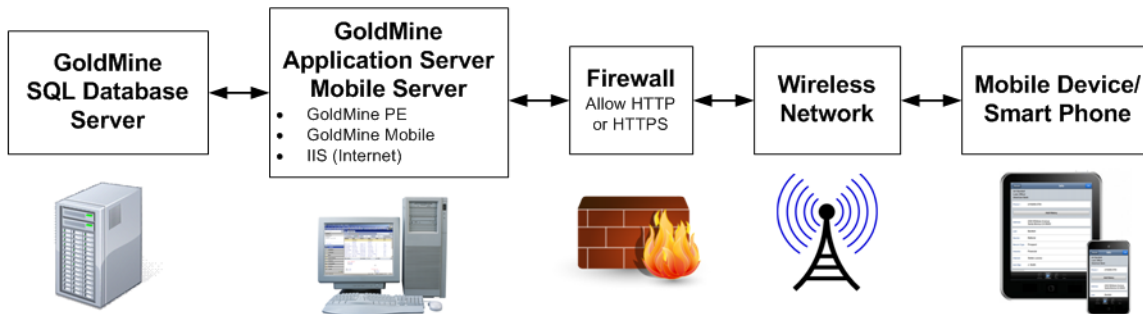
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# Installation on a Local Server

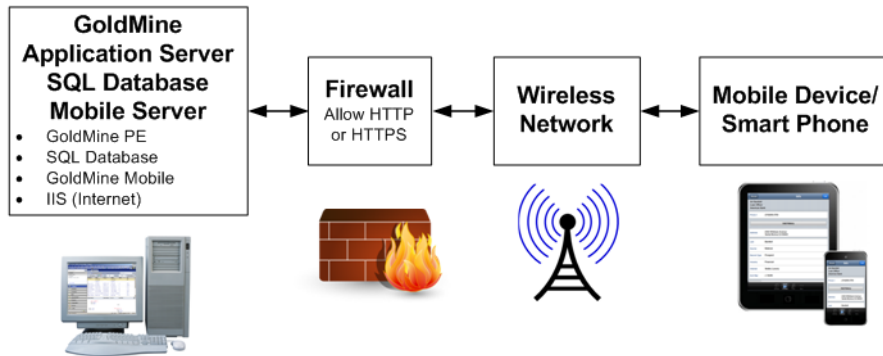
A **Local** installation is one where GoldMine PE and GoldMine Mobile are both installed on the same local computer. However, the GoldMine database can be on a different location. Refer to the *GoldMine Premium Edition Installation Guide* PDF for installation details.

## Installation Scenarios

- **Local Installation (with Remote Database)**



- **Local Installation (on a Single Server)**



## Installation Options

There are separate installation and configuration instructions for the various versions of Windows Server. Select from the following installation options, which pertain to your operating system and configuration.

- [Installing on Windows Server 2008 on a Local Server \(see page 8\)](#)
- [Installing on Windows Server 2003 R2 on a Local Server \(see page 8\)](#)

**NOTE:** For information about installing GoldMine PE and GoldMine Mobile on separate computers, refer to "Installation in a Workgroup" on page 10.

# Installing on Windows Server 2008 on a Local Server

The following instructions pertain to both 32-bit and 64-bit (R2) versions of Windows Server 2008 on a Local Server.

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**IMPORTANT:** SQL Server must be running for GoldMine Mobile to access the database.

---

1. Configure IIS.
  - a. **Start > Programs > Administrative Tools > Server Manager > Add Roles.**
  - b. Start the **Add Roles Wizard** and select the **Web Server (IIS)** role.
  - c. Apply Windows updates.
  - d. Restart System as needed.
2. Install the GoldMine Mobile application.
  - a. Run the **gmmobile.exe** file to start the wizard, and then click **Next**.
  - b. Accept the license agreement and confirmation options, and then click **Next**.
  - c. Choose the **Complete** installation type, and then click **Next**.
  - d. Click **Install** to start the installation process.
  - e. Click **Finish** to complete the installation.
3. Grant the **Users** group permissions to modify the **\ProgramData\GoldMine** directory.
4. [Add the GoldMine Mobile License to GoldMine \(see page 17\).](#)
5. [Set the GoldMine Mobile User Options \(see page 17\).](#)
6. [Configure Alarm Messages for GoldMine Mobile \(see page 19\).](#)
7. Restart IIS.
  - a. **Start > Run**
  - b. Type `iisreset` and click **OK**.

# Installing on Windows Server 2003 R2 on a Local Server

The following instructions pertain to both 32-bit and 64-bit versions of Windows Server 2003 R2 on a Local Server.

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**IMPORTANT:** SQL Server must be running for GoldMine Mobile to access the database.

---

1. Install the GoldMine Mobile application.
  - a. Run the **gmmobile.exe** file to start the wizard and **Next** to continue.
  - b. Accept the license agreement and confirmation options, and then click **Next**.
  - c. Choose the **Complete** installation type, and then click **Next**.
  - d. Click **Install** to start the installation process.
  - e. Click **Finish** to complete the installation.

2. Add a Wildcard Application Mapping to the GoldMine Site.

**NOTE:** GoldMine Mobile requires ASP.NET 4.x. If the web server for GoldMine Mobile is also hosting applications that require an earlier version of ASP.NET (such as 1.x or 2.x), use wildcard application mapping for GoldMine Mobile.

- a. Open IIS Manager.
- b. Expand **Web Sites > Default Web Site**.
- c. Select the **GoldMine** site.
- d. Right-click and select **Properties**.
- e. Select the **Virtual Directory** tab.
- f. Click the **Configuration** button.
- g. Select the **Mappings** tab and click the **Insert** button.
- h. Browse to the **c:\windows\Microsoft.NET\Framework\v4.0.30319** directory.
- i. Select the **aspnet\_isapi.dll** file and click **Open**.
- j. Deselect the **Verify that file exists** check box.
- k. Click **OK** until you return to the IIS Manager.

3. Allow Web Service Extension for ASP.NET v4.0.0319.

**For 32-bit Systems**

- a. Open IIS Manager.
- b. Click on **Web Service Extensions**.
- c. Select the **ASP.NET v4.0.0319** Web Service Extension.
- d. Click the **Allow** button.

**For 64-bit Systems**

- a. Open IIS Manager.
- b. Click on **Web Service Extensions**.
- c. Select the **ASP.NET v4.0.0319 (32-bit)** Web Service Extension.
- d. Click the **Allow** button.

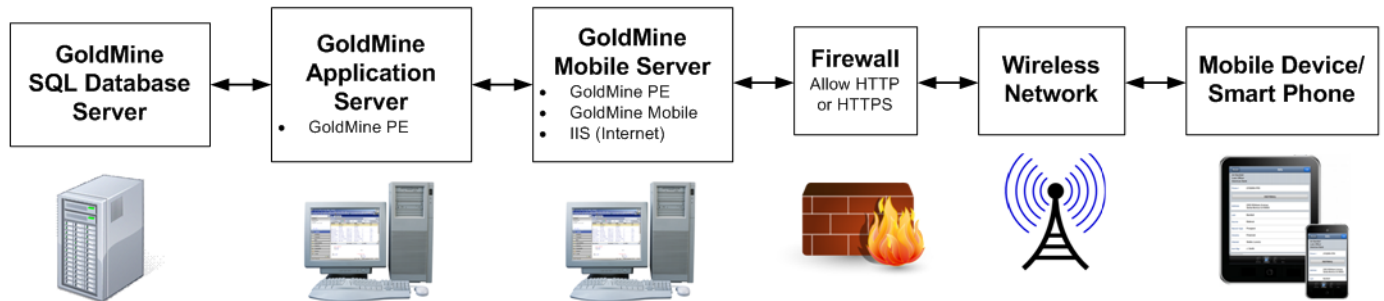
4. Grant the **Users** group permissions to modify the **\GoldMine** directory.
5. [Add the GoldMine Mobile License to GoldMine \(see page 17\)](#).
6. [Set the GoldMine Mobile User Options \(see page 17\)](#).
7. [Configure Alarm Messages for GoldMine Mobile \(see page 19\)](#).

# Installation in a Workgroup

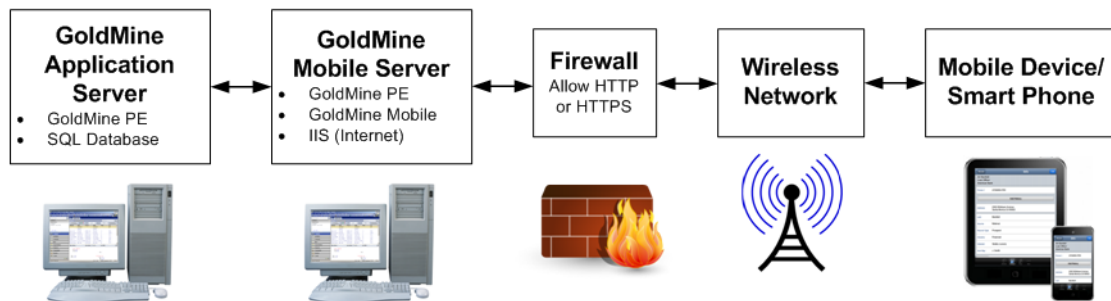
A **Workgroup** installation is an accessible server where the **GoldMine Application Server** (installed GoldMine PE connected to the GoldMine Database) and **GoldMine Mobile Server** (installed GoldMine PE and GoldMine Mobile Edition) are installed on separate computers located in the same workgroup. Refer to the *GoldMine Premium Edition Installation Guide* PDF for installation details.

## Installation Scenarios

- **Workgroup Installation (with Remote Database)**



- **Workgroup Installation (with Local Database)**



## Installation Options

There are separate installation and configuration instructions for the various versions of Microsoft's Windows Server. Select from the following installation options, which pertain to your operating system and configuration.

- [Installing on Windows Server 2008 in a Workgroup \(see page 10\)](#)
- [Installing on Windows Server 2003 R2 in a Workgroup \(see page 12\)](#)

## Installing on Windows Server 2008 in a Workgroup

The following instructions pertain to both 32-bit and 64-bit (R2) versions of Windows Server 2008 in the same workgroup.

In this example, the GoldMine Application Server and GoldMine Mobile Server are part of the same workgroup, but on different computers in the Workgroup. For additional installation details, refer to the *GoldMine Premium Edition Installation Guide* PDF.

1. On the GoldMine Mobile Server, Install GoldMine PE using the **Install GoldMine to connect to an existing database** installation option (using the UNC path) to connect to the GoldMine Application Server.

2. Configure IIS on the GoldMine Web Server.
    - a. **Start > Programs > Administrative Tools > Server Manager > Add Roles.**
    - b. Start the **Add Roles Wizard** and select the **Web Server (IIS)** role.
    - c. Apply Windows updates.
    - d. Restart system as needed.
  3. Install the GoldMine Mobile Edition application on the GoldMine Mobile Server.
    - a. Run the **gmmobile.exe** file to start the wizard and **Next** to continue.
    - b. Accept the license agreement and confirmation options, and then click **Next**.
    - c. Choose the **Complete** installation type, and then click **Next**.
    - d. Click **Install** to start the installation process.
    - e. Click **Finish** to complete the installation.
  4. Add a user (e.g., **gmmobile**) at the GoldMine Mobile Server to the **Users** group.
    - a. **Start > Programs > Administrative Tools > Computer Management.**
    - b. On the Computer Management tree, expand **Local Users and Groups**.
    - c. Select the **Users** folder, then right click and select **New User**.
    - d. Add the **User name** (e.g., **gmmobile**) and the **Password**.
    - e. Click the **Create** button.
  5. Add the user (e.g., **gmmobile**) to the GoldMine Mobile Server **IIS\_IUSRS** group.
    - a. On the Computer Management tree, expand **Local Users and Groups**.
    - b. Select the **Groups** folder.
    - c. In the panel on the right, select the **IIS\_IUSRS** group, then right-click and select **Properties**.
    - d. Click the **Add** button and add the user (e.g., **gmmobile**) created in the previous step.
    - e. Click **OK** and then **OK**.
  6. Add the user (e.g., **gmmobile**) at the GoldMine Application Server to the **Users** group.
  7. Grant the user (e.g., **gmmobile**) permission to modify the **\ProgramData\GoldMine** folders on the GoldMine Application Server and the GoldMine Mobile Server.
  8. On the GoldMine Mobile Server, assign the application pool identity to the added user.
    - a. Open IIS Manager.
    - b. Right-click on the **GMMobileAppPool** application pool.
    - c. Select **Advanced Settings**, then **Process Model > Identity**.
    - d. Click the ellipses button (...) next to **ApplicationPoolIdentity**.
    - e. Select the **Custom account** radio button.
    - f. Click **Set**.
    - g. Enter the Windows **User name** (e.g., **gmmobile**) and **Password**.
- NOTE:** The **User name/Password** combination must be the same in all locations where the User (e.g., **gmmobile**) is added.
9. [Add the GoldMine Mobile License to GoldMine \(see page 17\).](#)
  10. [Set the GoldMine Mobile User Options \(see page 17\).](#)
  11. [Configure Alarm Messages for GoldMine Mobile \(see page 19\)](#) .
  12. Restart IIS.
    - a. **Start > Run**
    - b. Type `iisreset` and click **OK**.

# Installing on Windows Server 2003 R2 in a Workgroup

The following instructions pertain to both 32-bit and 64-bit versions of Windows Server 2003 R2 on a Local Server.

In this example, the GoldMine Application Server and GoldMine Mobile Server are part of the same workgroup, but on different computers in a Workgroup. For additional installation details, refer to the *GoldMine Premium Edition Installation Guide* PDF.

1. On the GoldMine Mobile Server, Install GoldMine PE using the **Install GoldMine to connect to an existing database** installation option (using the UNC path) to connect to the GoldMine Application Server (refer to the *GoldMine Premium Edition Installation Guide* pdf).
2. Install the GoldMine Mobile Application.
  - a. Run the **gmmobile.exe** file to start the wizard and **Next** to continue.
  - b. Accept the license agreement and confirmation options, and then click **Next**.
  - c. Choose the **Complete** installation type, and then click **Next**.
  - d. Click **Install** to start the installation process.
  - e. Click **Finish** to complete the installation.
3. Add a user (e.g., **gmmobile**) at the GoldMine Mobile Server to the **Users** group.
  - a. **Start > Settings > Control Panel > Administrative Tools > Computer Management**.
  - b. On the Computer Management tree, expand **Local Users and Groups**.
  - c. Select the **Users** folder, then right click and select **New User**.
  - d. Add the **User name** (e.g., **gmmobile**) and the **Password**.
  - e. Click the **Create** button, then click **Close**.
4. Add the user (e.g., **gmmobile**) at the GoldMine Mobile Server to **IIS\_IUSRS** group.
  - a. On the Computer Management tree, expand **Local Users and Groups**.
  - b. Select the **Groups** folder.
  - c. In the panel on the right, select the **IIS\_WPG** group, then right-click and select **Properties**.
  - d. Click the **Add** button and add the user (e.g., **gmmobile**) created in the previous step.
  - e. Click **OK** and then **OK**.
5. Add the user (e.g., **gmmobile**) at the GoldMine Application Server to the **Users** group.
6. Grant the users (e.g., **gmmobile**) permission to modify the **\GoldMine** folder on the GoldMine Application Server and the GoldMine Mobile Server.

7. Add a Wildcard Application Mapping to the GoldMine Site

**NOTE:** GoldMine Mobile requires ASP.NET 4.x. If the web server for GoldMine Mobile is also hosting applications that require an earlier version of ASP.NET (such as 1.x or 2.x), use wildcard application mapping for GoldMine Mobile.

- a. Open IIS Manager.
  - b. Expand **Web Sites > Default Web Site**.
  - c. Select the **GoldMine** site.
  - d. Right-click and select **Properties**.
  - e. Select the **Virtual Directory** tab.
  - f. Click the **Configuration** button.
  - g. Select the **Mappings** tab and click the **Insert** button.
  - h. Browse to the **c:\windows\Microsoft.NET\Framework\v4.0.30319** directory.
  - i. Select the **aspnet\_isapi.dll** file and click **Open**.
  - j. Deselect the **Verify that file exists** check box.
  - k. Click **OK** until you return to the IIS Manager.
8. Assign application pool identity to the added user.
- a. Right-click on the newly created **GMMobileAppPool** application pool and select **Properties**.
  - b. Click the **Identity** tab .
  - c. Select the **Configurable** radio button.
  - d. Enter or browse for the user (e.g., **gmmobile**).

**NOTE:** The **User name/Password** combination must be the same in all locations where the User (e.g, **gmmobile**) is added.

9. Allow Web Service Extension for ASP.NET v4.0.0319.

**For 32-bit Systems**

- a. Open IIS Manager.
- b. Click on **Web Service Extensions**.
- c. Select the **ASP.NET v4.0.0319** Web Service Extension.
- d. Click the **Allow** button.

**For 64-bit Systems**

- a. Open IIS Manager.
- b. Click on **Web Service Extensions**.
- c. Select the **ASP.NET v4.0.0319 (32-bit)** Web Service Extension.
- d. Click the **Allow** button.

10. [Add the GoldMine Mobile License to GoldMine \(see page 17\)](#).
11. [Set the GoldMine Mobile User Options \(see page 17\)](#).
12. [Configure Alarm Messages for GoldMine Mobile \(see page 19\)](#).

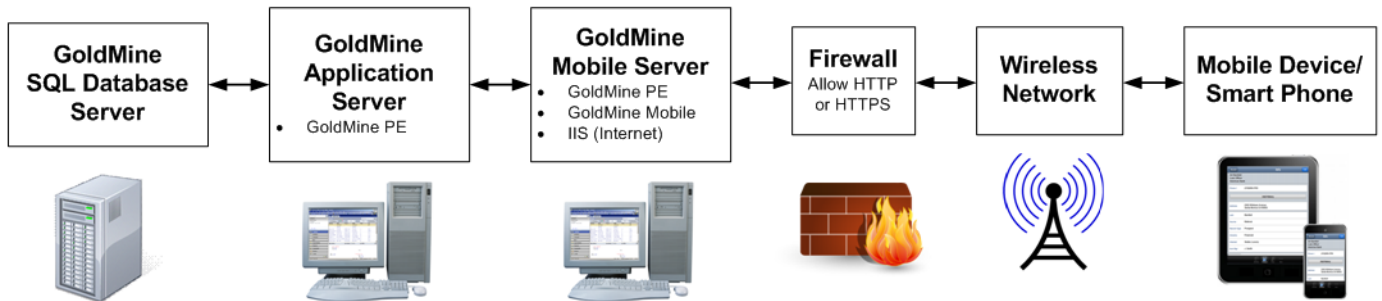
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# Installation in a Domain

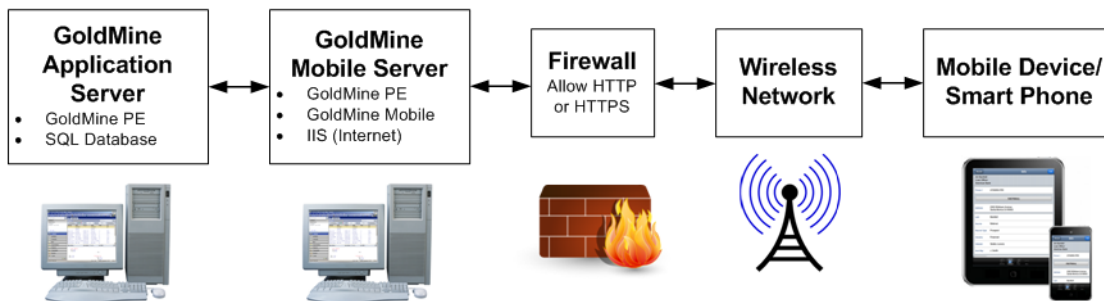
A **Domain** installation is an accessible server where the **GoldMine Application Server** (installed GoldMine PE connected to the GoldMine Database) and **GoldMine Mobile Server** (installed GoldMine PE and GoldMine Mobile Edition) are installed on separate computers located in the same domain. Refer to the *GoldMine Premium Edition Installation Guide* PDF for installation details.

## Installation Scenarios

- **Domain Installation (with Remote Database)**



- **Domain Installation (with Local Database)**



## Installation Options

There are separate installation and configuration instructions for the various versions of Windows Server. Select from the following installation options, which pertain to your operating system and configuration.

- [Installing on Windows Server 2008 in a Domain \(see page 15\)](#)
- [Installing on Windows Server 2003 R2 in a Domain \(see page 15\)](#)

## Installing on Windows Server 2008 in a Domain

The following instructions pertain to both 32-bit and 64-bit (R2) versions of Windows Server 2008 in the same domain.

In this example, the GoldMine Application Server and GoldMine Mobile Server are part of the same domain. For additional installation details, refer to the *GoldMine Premium Edition Installation Guide* PDF.

1. On the GoldMine Mobile Server, Install GoldMine PE using the **Install GoldMine to connect to an existing database** installation option (using the UNC path) to connect to the GoldMine Application Server (refer to the *GoldMine Premium Edition Installation Guide* pdf).
2. Configure IIS.
  - a. **Start > Programs > Administrative Tools > Server Manager > Add Roles.**
  - b. Start the **Add Roles Wizard** and select the **Web Server (IIS)** role.
  - c. Apply Windows updates.
  - d. Restart system as needed.
3. Install the GoldMine Mobile application.
  - a. Run the **gmmobile.exe** file to start the wizard, and then click **Next**.
  - b. Accept the license agreement and confirmation options, and then click **Next**.
  - c. Choose the **Complete** installation type, and then click **Next**.
  - d. Click **Install** to start the installation process.
  - e. Click **Finish** to complete the installation.
4. Grant the **Users** group **Modify** permissions on the **\ProgramData\GoldMine** folder on the GoldMine Application Server and the GoldMine Mobile Server.
5. [Add the GoldMine Mobile License to GoldMine \(see page 17\).](#)
6. [Set the GoldMine Mobile User Options \(see page 17\).](#)
7. [Configure Alarm Messages for GoldMine Mobile \(see page 19\).](#)
8. Restart IIS.
  - a. **Start > Run**
  - b. Type `iisreset` and click **OK**.

## Installing on Windows Server 2003 R2 in a Domain

The GoldMine server and GoldMine Mobile server are part of the same domain.

1. On the GoldMine Mobile Server, Install GoldMine PE using the **Install GoldMine to connect to an existing database** installation option (using the UNC path) to connect to the GoldMine Application Server (refer to the *GoldMine Premium Edition Installation Guide* pdf).
2. Install the GoldMine Mobile Application.
  - a. Run the **gmmobile.exe** file to start the wizard and **Next** to continue.
  - b. Accept the license agreement and confirmation options, and then click **Next**.
  - c. Choose the **Complete** installation type, and then click **Next**.
  - d. Click **Install** to start the installation process.
  - e. Click **Finish** to complete the installation.

3. Grant the **Users** group **Modify** permissions on the **\GoldMine** folder on the GoldMine Application Server and the GoldMine Mobile Server.
4. Add a Wildcard Application Mapping to the GoldMine Site.

**NOTE:** GoldMine Mobile requires ASP.NET 4.x. If the web server for GoldMine Mobile is also hosting applications that require an earlier version of ASP.NET (such as 1.x or 2.x), use wildcard application mapping for GoldMine Mobile.

- a. Open IIS Manager.
  - b. Expand **Web Sites > Default Web Site**.
  - c. Select the **GoldMine** site.
  - d. Right-click and select **Properties**.
  - e. Select the **Virtual Directory** tab.
  - f. Click the **Configuration** button.
  - g. Select the **Mappings** tab and click the **Insert** button.
  - h. Browse to the **c:\windows\Microsoft.NET\Framework\v4.0.30319** directory.
  - i. Select the **aspnet\_isapi.dll** file and click **Open**.
  - j. Deselect the **Verify that file exists** check box.
  - k. Click **OK** until you return to the IIS Manager.
5. Allow Web Service Extension for ASP.NET v4.0.0319.

#### **For 32-bit Systems**

- a. Open IIS Manager.
- b. Click on **Web Service Extensions**.
- c. Select the **ASP.NET v4.0.0319** Web Service Extension.
- d. Click the **Allow** button.

#### **For 64-bit Systems**

- a. Open IIS Manager.
- b. Click on **Web Service Extensions**.
- c. Select the **ASP.NET v4.0.0319 (32-bit)** Web Service Extension.
- d. Click the **Allow** button.

6. [Add the GoldMine Mobile License to GoldMine \(see page 17\)](#).
7. [Set the GoldMine Mobile User Options \(see page 17\)](#).
8. [Configure Alarm Messages for GoldMine Mobile \(see page 19\)](#).

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# Update GoldMine Mobile License and Users

Users are not able to login or use GoldMine Mobile until after you [Add the GoldMine Mobile License to GoldMine \(see page 17\)](#) and [Set the GoldMine Mobile User Options \(see page 17\)](#) in GoldMine PE.

## Add the GoldMine Mobile License to GoldMine

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools** menu and select **Configure > License Manager**.
3. Click the **New License** button to open the GoldMine License Upgrade dialog box.
4. Click **I AGREE** to continue.
5. Enter or paste the GoldMine Mobile license number (composed of three Serial Number & Key Code), and then click **OK**.
6. Click **Close** to close the GoldMine License Manager.

**NOTE:** For more information about “Licensing”, refer to the *GoldMine Premium Edition Administrator Guide* PDF or GoldMine PE Online Help.

## Set the GoldMine Mobile User Options

After the GoldMine Mobile License has been added in the License Manager, the GoldMine Mobile users must be added and configured. The following options are available on the GoldMine Mobile configuration dialog box:

- [To Specify GoldMine Users \(see page 17\)](#)
- [To Select the E-mail Composer \(see page 17\)](#)
- [To Enable the “Remember Me” Option \(see page 18\)](#)
- [To Set the User Time-Out Duration \(see page 18\)](#)

### *To Specify GoldMine Users*

The GoldMine Users that can login to GoldMine Mobile must be defined in GoldMine PE before they can access the database.



**IMPORTANT:** If you assign the Master user as a GoldMine Mobile user, it is recommended that you change the default password. Otherwise, the system could be exposed to unauthorized users.

---

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools** menu and select **Configure > GoldMine Mobile**.
3. Specify the GoldMine Mobile user(s) by double-clicking the User name from the list on the left to move it to the list on the right.

**TIP:** You can also select users from the list and then click the **Left** or **Right** arrow buttons to move them from one list to the other. This method can be used to remove a user’s authorization by moving the name from the list on the right back to the list on the left.

4. Click **OK**.

### *To Select the E-mail Composer*

By default, GoldMine Mobile uses the GoldMine e-mail composer for sending and receiving e-mail. This can be changed to use the e-mail application on the mobile device, if desired.

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools** menu and select **Configure > GoldMine Mobile**.
3. Choose whether or not to **Use the GoldMine e-mail composer by default**.
4. Click **OK**.

## To Enable the “Remember Me” Option

When the GoldMine Mobile user access the login screen, they can be provided the option to remember their login user name, but not their password. To enable this option, follow the steps below.

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools** menu and select **Configure > GoldMine Mobile**.
3. Check the **Enable ‘Remember Me’ on the login screen** option.
4. Click **OK**.

**NOTE:** This option can be configured individually by each user.

## To Set the User Time-Out Duration

GoldMine Mobile automatically logs out a user after a defined duration of non-activity. This value is set to 15 minutes by default, but can be modified to suit your needs.

**NOTE:** After the time-out duration has been exceeded, the screen continues to display the last screen in use. However, if you attempt to do anything within the application, you will be directed back to the login screen.

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools** menu and select **Configure > GoldMine Mobile**.
3. In the **Time-out user session when idle** area, use the Up/Down arrows, or enter a value, to set the time-out duration.
4. Click **OK**.

---

## Grant Access to the GoldMine Mobile Web Server

Users will access GoldMine Mobile through a web server, which needs to be accessible from the Internet. By default, the GoldMine Mobile installer creates the virtual directory **goldmine**. The URL used by GoldMine Mobile users will be **http://<server-IP-address>/goldmine** (or **https://** if you are using SSL). If you would like to use a named URL (e.g., mydomain.com) you will need to configure their DNS server.

**TIP:** HTTPS (HyperText Transfer Protocol Secure) is optional and requires an SSL (Secure Sockets Layer) certificate and configuration in IIS to require SSL.

With this in mind, the following must be true:

- The server computer has a public IP address that is reachable by the Internet.
- The Domain Name System (DNS) should be able to resolve the web server name to an IP address.
- The web server firewall needs to allow data exchange via HTTP or HTTPS protocols.

**NOTE:** For details about setting up your Firewall, refer to the documentation provided by the manufacturer.

---

# Configure Alarm Messages for GoldMine Mobile

Alarms for upcoming activities can be sent to the end-user's mobile devices as SMS messages (Short Message Service). This feature enables users to receive audible reminders even when they are not logged in to GoldMine Mobile Edition. After being configured in GoldMine PE, users can receive text message reminder and audible text tone alerts (or vibration when silenced).

Messaging must be configured by the Administrator within GoldMine PE in the following places:

- [Enabling Activity Reminders in GoldMine PE \(see page 19\)](#)
- [Setting the Web Server URL \(see page 20\)](#)
- [Enabling Message Reception for GoldMine Mobile Users \(see page 21\)](#)

**TIP:** The content of the text messages can also be customized (see [Modifying the SMS Template](#)).

## Important Notes about SMS Messaging

- GoldMine SMS messaging requires a production license (see ["Add the GoldMine Mobile License to GoldMine" on page 17](#)).
- The **GoldMine Messaging** service (Window's **Control Panel > Administrative Tools > Services**) must be running before SMS messages can be sent.
- GoldMine SMS messaging is only available for those GoldMine users specified as GoldMine Mobile users by the Administrator (see ["Set the GoldMine Mobile User Options" on page 17](#)).

## Enabling Activity Reminders in GoldMine PE

Before GoldMine can send Activity reminders to mobile device users, GoldMine Messaging must be enabled within the GoldMine system.



**IMPORTANT:** GoldMine Mobile must be installed before enabling activity reminders.

---

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools** menu and select **Configure > System Settings**.
3. Click the **Messaging** tab.
4. Check the **Enable GoldMine Messaging** box.
  - **For Workgroup Installations:** Change the logon account for the GoldMine Messaging Service.
    - a. **Start > Settings > Control Panel > Administrative Tools > Services.**
    - b. Select the **GoldMine Messaging Service**.
    - c. Right-click and select **Properties**.
    - d. Click the **Log On** tab.
    - e. Select the **This account** radio button.
    - f. Enter the GoldMine Windows account (e.g, **gmmobile**) and password.
    - g. Click **OK**.
    - h. Start the **GoldMine Messaging Service**.

**NOTE:** On Server 2008 systems, start the GoldMine Messaging service in Windows Services (**Start > Settings > Control Panel > Administrative Tools > Services**).

5. Specify the GoldMine username used to send GoldMine Alarms from the **Send from** drop-down list.

**NOTE:** The selected username must have an email account already configured in their user options or users will not receive reminder messages.

6. Click **OK**.

## Modifying the SMS Template

The SMS Message is comprised of text and macros that are used to produce the reminder message. To change the content that displays within the activity reminder message, the Message Template must be modified. Follow the steps listed below to modify the template.

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools** menu and select **Configure > System Settings**.
3. Click the **Messaging** tab.
4. Modify the Message Template.

The **Message Template** field contains a combination of **Text** and **Macros**.

- **Text:** Text is the alphanumeric characters before and/or after the Macro.
- **Macro:** Macros are denoted by the surrounding brackets (e.g., **[date]**).

The following macros can be used in the message body:

**[date]** – date of an activity (CAL.ONDATE)

**[time]** – time of an activity (CAL.ONTIME)

**[reference]** – reference (CAL.REF)

**[company]** – linked contact name (Contact1.Company)

**[contact]** – linked contact name (Contact1.Contact)

**[phone]** – linked contact name (Contact1.Phone1)

**[link]** – link to an activity that is used to open it in GoldMine Mobile

5. Click the **Show Example** button to view a sample message.
6. When you are satisfied with the changes, click **OK** to save your changes.

## Setting the Web Server URL

The Alarm message includes a link to the Activity in the GoldMine database. To enable this ability, the URL to the GoldMine Mobile web server must be defined to form the link.

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools** menu and select **Configure > GoldMine Mobile**.
3. In the Web server URL text box, enter the path to the GoldMine Mobile site.  
For example: **http://yourcompany.com/goldmine**
4. Click **OK**.

# Enabling Message Reception for GoldMine Mobile Users

After [Enabling Activity Reminders in GoldMine PE \(see page 19\)](#), specify the GoldMine Mobile users that can receive activity message reminders from GoldMine PE, and configure the message reception for their mobile devices.



**IMPORTANT:** GoldMine Mobile must be installed before enabling message reception.

---

1. Log into GoldMine PE as a user with Master rights.
2. Open the **Tools** menu and select **Users' Settings**.
3. Select the desired GoldMine Mobile user and then click the **Preferences** button.
4. On the <User's> Options page, select the **Messaging** tab.
5. Check the **Send activity alarms as a message to my device** box.
6. Specify the GoldMine Mobile User's e-mail address used for receiving SMS messages in the **E-mail address for the mobile device** text box.

**NOTE:** This option is also available for non-master rights users provided that message sending has already been enabled in the System Settings (see "[Enabling Activity Reminders in GoldMine PE](#)" on page 19).

**TIP:** For assistance in determining the e-mail address, refer to the following article for a listing of service providers' SMS gateways: [http://en.wikipedia.org/wiki/List\\_of\\_SMS\\_gateways](http://en.wikipedia.org/wiki/List_of_SMS_gateways)

7. Click **OK**.
8. Repeat this process for other GoldMine Mobile users as needed.

---

## Error Messages Troubleshooting

After installation and configuration of GoldMine PE and GoldMine Mobile, any error messages that appear in the GoldMine Mobile application are logged by the Event Viewer to the server where GoldMine Mobile is installed. If there is a system error (such as an error message shown to an end user) the administrator can check the Event Viewer (Application log) for troubleshooting information. Administrators can use this information to troubleshoot the problem themselves or provide to technical support for further assistance.

### *To Access the Event Viewer*

Use one of the following methods to open the Event Viewer:

- Open **Administrative Tools** and double-click **Event Viewer**
- Open a **Command Prompt**, type eventvwr, and then press ENTER.

**NOTE:** For more information about the Event Viewer, refer to the Server 2003/2008 documentation provided by the manufacturer.



# GoldMine Mobile User Guide

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## Overview

- [Getting Started \(see page 23\)](#)
  - [GoldMine Mobile Overview \(see page 24\)](#)
  - [Activities \(see page 27\)](#)
  - [Contacts \(see page 28\)](#)
  - [Cases \(see page 30\)](#)
  - [More \(see page 31\)](#)
- 

## Getting Started

- [Login to GoldMine Mobile \(see page 23\)](#)
- [Create a Shortcut on the Home Screen \(see page 24\)](#)

## Login to GoldMine Mobile

When you open the GoldMine Mobile application, you will be required to login before you can access the database. Your login and password combination is the same one used when logging in to GoldMine PE, and contains all the rights defined for your login role.

**NOTE:** Passwords are sent in encrypted form when using either HTTP or HTTPS. HTTPS provides a higher level of security and also encrypts customer data sent over the network.

### *To Open GoldMine Mobile from a Link*

If you were sent a link to the URL in a message, follow the steps below.

1. Open the message (email or text) and tap the link.
2. Your default mobile web browser opens to the GoldMine Mobile login screen.
3. Enter your Username and Password and then tap **Login**.
4. [Create a Shortcut on the Home Screen \(see page 24\)](#).

### *To Open GoldMine Mobile from the Home Screen*

1. Tap the **GoldMine Mobile** shortcut on the Home screen
2. Your default web browser opens to the login screen.
3. Enter your Username and Password and then tap **Login**.
4. [Create a Shortcut on the Home Screen \(see page 24\)](#).

# Create a Shortcut on the Home Screen

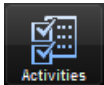
If you do not have a shortcut to GoldMine Mobile on the Home screen of your mobile device, follow these steps to create one.

**NOTE:** The shortcut must be made from the GoldMine Mobile Login screen. If you are currently logged in, you must logout before creating the shortcut.

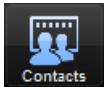
1. Open the GoldMine Mobile login page location in your mobile browser.
2. Tap the **Bookmarks** button on the tab bar.
3. Tap **Add to Home Screen**.
4. Enter **GoldMine Mobile** as the title and then click **Add**.

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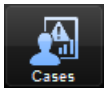
## GoldMine Mobile Overview



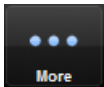
Activities



Contacts



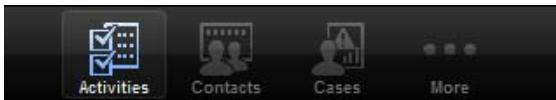
Cases



More

For more information, see the ["Tab Bar" on page 24](#) and the ["List and Detail Panels" on page 25](#).

## Tab Bar



The Tab Bar is located at the bottom of the application screen. It contains a list of buttons to switch to another type of business object record and access to additional GoldMine Mobile content.

- **Activities:** search, view, schedule, reassign, and complete activities.
- **Contacts:** search, view, add, and update contacts.
- **Cases:** search, review, create, and change case information.
- **More:** open a new screen to change Settings, view About details, open Help, and Logout.

# List and Detail Panels

The user interface for GoldMine Mobile consists of the [List Panel](#) and [Details Panel](#). For detailed information about each panel, refer to the following topics:

- [List Panel \(see page 25\)](#)
- [Details Panel \(see page 25\)](#)

## List Panel

The List Panel initially contains a list of categories used to refine the list based on your selection. Subsequent to selecting a category option, the List panel displays a list of items from which you can make selection.

To select a list item and view the details, tap an item. The details appear in the [Details Panel \(see page 25\)](#) panel. The List Panel also contains a [Search Bar \(see page 25\)](#) to quickly filter and help you find the desired item(s) on the list.

**NOTE:** You can use the **Add** button on the List Panel to add new entries to the list.

## Search Bar

The Search bar is located at the top of the List of a selected category (see "[List Panel](#)" on page 25). You can enter alpha-numeric characters into this field to search the current list for matching entries.



Search Field

Clear Field Button

## To Run a Search

1. Tap in the Search Field to enable the on-screen keyboard of the mobile device.
2. Start entering text in the field.

As you start typing characters, Search automatically filters the current list. The more characters you enter, the further refined the search results appear. Alternately, as you remove characters from the search, the results increase.

3. Select the desired record to view the details.

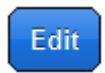
**TIP:** To clear the search field and reset the list, tap the **Clear Field** button to the right of the Search Field.

## Details Panel

When you select an item from the [List Panel \(see page 25\)](#), the general details appear in the Details Panel. The Details Panel is comprised of [Action Buttons \(see page 26\)](#) and the [Details Form \(see page 26\)](#).

## Action Buttons

The Action Buttons are located at the top of each form. These buttons allow you to perform various functions on the form, and can include the following types of buttons (depending on the type of form):



**Edit:** Tap the this button to open the current Details screen to edit the current record.



**Add:** Tap this button to add Details to a Contact.



**Add Contact:** Tap this button to add a Contact.



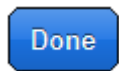
**Add Activity:** Tap this button to add a new Activity.



**Add Case:** Tap this button to add a new Case.



**Back:** Tap this button to navigate back to the previous screen. The label of this button is based on the record type to which it returns.



**Done:** Tap this button to save your changes when editing or adding records.



**Cancel:** Tap this button to abort any changes when editing or adding records.

## Details Form


The Details Form contains all defined fields for the form type for [Viewing Form Fields \(see page 26\)](#) and [Updating Form Fields \(see page 27\)](#).

### Viewing Form Fields

Form fields make up the body of the form. The fields that display depend on the type of record being viewed and the fields that you are allowed to view based on your login (also see [Updating Form Fields](#)).





**TIP:** If the fields extend beyond the visible area on the screen, tap and drag (scroll) the screen to view more content.

There are several different fields types that can appear on the form screen.

- **Text Fields** display plain text, such as a names, values, or other details. Gray text indicates a read-only field and cannot be modified when editing a form.
- **Phone Number Fields** display numeric values as underlined text, which can then be tapped to initiate a call (only available on mobile devices which allow cellular-based calls).
- **More Fields** display text with and icon . When you tap a field with this icon, a new screen opens.
- **Email Fields** display the assigned email address. When you tap this text, the email program on the mobile device opens to send email to this address. For more information, see ["Disable the GoldMine Email Client" on page 31](#).
- **Address Fields** display the location for a contact and (when tapped) the mobile device's mapping application opens to show the location of the contact on a map.

## Updating Form Fields

When adding or editing a form, the following functionality becomes available:

- Tap in a field to directly change the text or values.
- Tap the **LookUp** button  to open a new screen of options.
- Tap the **Add Field** button  to open a list of optional fields to add to the form.
- Tap a **down arrow** button  to select from a list of options for the field.
- Tap the (-) or (+) buttons to set a duration, or enter text directly into a time field.
- Check  the field to enable/disable an option, such as an alarm or other notification.
- Tap a **Date** field to view a scrollable date wheel for Month, Day, and Year.
- Tap a **Time** field to view a scrollable time wheel for Hours, Minutes, and AM/PM.

---

## Activities

- [Select an Activities List Filter](#)
- [View Activity Details](#)
- [Update an Activity](#)
- [Add an Activity](#)

### Select an Activities List Filter

The Activities List displays several filter options to quickly sort through your Activities.

- **Recently Viewed** displays all of the recently viewed Activities.
- **All Open** displays a list of all open activities.
- **Open To-Dos** displays a list of all open items on your To-do list.
- **By type** displays another page sorted by Status. Select a Status option to view the Activities sorted by type.

**TIP:** After selecting a filter, use the [Search Bar \(see page 25\)](#) to search the Activities list.

### View Activity Details

1. Tap **Activities** on the [Tab Bar \(see page 24\)](#).
2. [Select an Activities List Filter \(see page 27\)](#) from the list.
3. Locate and select the Activity to view the details.


**TIP:** You can search for an Activity using the [Search Bar \(see page 25\)](#).

### Update an Activity

1. Tap **Activities** on the [Tab Bar \(see page 24\)](#).
2. Select an Activities filter from the list.
3. Locate and select the Activity to view the details.
4. Tap the **Edit** button to open the record for edit.
5. Make any changes and then tap **Done** to save changes.

**NOTE:** Opportunities that are linked to a Sale activity can not be closed through GoldMine Mobile. Alternately, you can set the RSVP option to flag the Sale activity after it has been closed.

## Add an Activity

1. Tap **Activities** on the [Tab Bar \(see page 24\)](#).
2. Tap the **Add Item** button .
3. Select the type of Activity you want to add from the list.
4. Enter the details for the new record (see "[Details Form](#)" on page 26).

**TIP:** To view the schedules of users assigned to the activity, click the **Free/Busy** button at the bottom of the page.

5. Tap **Done** to create the new Activity.

---

## Contacts

- [Select a Contact List Filter](#)
- [View Contact Details](#)
- [Add an Unscheduled Activity](#)
- [Edit Contact Details](#)
- [Add Contact Record](#)

### Select a Contact List Filter

The Contacts List displays several filter options to quickly sort through your Contacts.

- **Recent** displays your recently viewed Contacts.
- **My Contacts** displays Contacts which you have added to your Contact list.
- **All Contacts** displays all Contacts in the database.

**NOTE:** Displaying all contacts in a large database can cause slow performance.

- **Filters** displays a list of filters used to sort Contacts.
- **Groups** displays a list of groups used to categorize Contact. Select a Group option to view the Contacts list.

**TIP:** After selecting a filter, use the Search box to search the Contact list.

### View Contact Details

1. Tap **Contacts** on the [Tab Bar \(see page 24\)](#).
2. [Select a Contact List Filter \(see page 28\)](#) option from the list.
3. Scroll the list to view the records.
4. Tap the desired contact record to view the details.

**NOTE:** Database fields used for addresses are always organized together in a group, even if they are relabeled for a purpose other than storing addresses.

5. Select from the Additional Fields at the bottom of the details area:
  - **Details** displays details records to track basic information on topics meaningful to your business.
  - **Custom screens** displays the custom screens setup through GoldMine. For more information, refer to "Creating Custom Screens" in the *GoldMine Premium Edition Administrator Guide* PDF or Online Help.

- **Notes** allows you to store free-form written information about the contact.
  - **To Add a Note:** Tap the **Add** button, enter the details, and then tap **Done**.
  - **To Edit a Note:** Select the note and tap **Edit**. Then edit the details and tap **Done**.
  - **To Delete a Note:** Select the note, tap **Edit**, and then tap **Delete**.
- **Pending** displays all [Activities \(see page 27\)](#) scheduled for the contact.
- **History** stores completed scheduled and unscheduled activities for the contact.
- **Additional contacts** displays a list of all contacts associated with the current contact.
- **Cases** displays all cases linked to the contact.

**TIP:** You can search for a Contact by name, company, or phone number in the [Search Bar \(see page 25\)](#).

## Add an Unscheduled Activity



You can create new unscheduled activity for an active Contact record using the **Add History** button in Contact details form.

1. Tap **Add History** on the Contact's detail screen.
2. On the New screen, complete all fields.
3. Tap **Done** to save the activity for the Contact.

## Edit Contact Details

1. Tap **Contacts** on the [Tab Bar \(see page 24\)](#).
2. Select a Contacts filter option from the list.
3. Scroll the list to view the records.
4. Tap the desired contact record to view the details.
5. Tap the **Edit** button to open the record for edit.
6. Make any changes and then tap **Done** to save changes.

## Add Contact Record

1. Tap **Contacts** on the [Tab Bar \(see page 24\)](#).
2. Tap the **Add Contact** button .
3. Select the Contact type from the menu.
4. Enter the details for the new record.
5. To add additional fields, tap the **add field** button. .

**NOTE:** Only fields with content are displayed when viewing the Contact record details.

6. Tap **Done** to save the record.

---

# Cases

- [Select a Cases List Filter](#)
- [View Case Details](#)
- [Update Case Details](#)
- [Add a Case](#)

## Select a Cases List Filter

The Cases List displays several filter options to quickly sort through your Cases.

- **Recent** displays all of the recently viewed Cases.
- **All Cases** displays all Cases regardless of status or assignment.
- **Open Cases** displays all open Cases regardless of assignment.
- **My Priority List** displays all your high-priority Cases.
- **My Cases** displays all Cases assigned to you.
- **My Group's Cases** displays all Cases assigned to your group with additional filters by Open Cases and sorted by User.

**TIP:** After selecting a filter, use the [Search Bar \(see page 25\)](#) to search the Cases list.

## View Case Details


1. Tap **Cases** on the [Tab Bar \(see page 24\)](#).
2. Select a Cases filter from the list.
3. Tap the desired Case to view the details.

**TIP:** You can search for a Case using the [Search Bar \(see page 25\)](#).

## Update Case Details

1. Tap **Cases** on the [Tab Bar \(see page 24\)](#).
2. Select a Cases filter option from the list.
3. Tap the desired Case record to view the details.
4. Tap the **Edit** button to open the Case for edit.
5. Make any changes and then tap **Done** to save changes.

## Add a Case

1. Tap **Cases** on the [Tab Bar \(see page 24\)](#).
2. Tap the **Add** button .
3. Enter the details for the new record.
4. Tap **Done** to save the record.

---

# More

The **More** button on the [Tab Bar \(see page 24\)](#) opens a new screen with the following options:

- **About** displays the version and copyright information.
- **Help** opens the GoldMine Mobile Online Help (see "[Viewing GoldMine Mobile Help](#)" on page 33).
- **Settings** opens the GoldMine Mobile [Settings](#) screen.
- **Logout** logs the user out of the application and returns to the login screen.

## Settings

The **Settings** option opens a screen of options to modify how the data and interface appear for the selected user.

- [E-Mail \(see page 31\)](#)
- [Contact \(see page 32\)](#)
- [Theme \(see page 32\)](#)
- [Login \(see page 32\)](#)

### *E-Mail*

#### **Disable the GoldMine Email Client**

By default, GoldMine Mobile uses the GoldMine composer to send email on your mobile device, which allows for the contact message-linking and history tracking features found in GoldMine's E-mail Center. However, if you would prefer to use the default email client on your mobile device, you can choose to disable the GoldMine Composer in GoldMine Mobile. When email is sent using the GoldMine Composer, it is automatically linked to the contact and case. Automatic linking does not occur when using the default mobile device email client.

**NOTE:** Before you can use the GoldMine Email client, it must first be configured in GoldMine. For more information, refer to the *GoldMine Premium Edition Administrator Guide* PDF.

1. Tap **More** on the [Tab Bar \(see page 24\)](#).
2. Tap the **Setting** tab.
3. Tap the **E-Mail** option.
4. Tap the **Off** button.

**TIP:** To enable the GoldMine Composer, set this option to **ON**.

#### **Add an Email Signature**

1. Tap **More** on the [Tab Bar \(see page 24\)](#).
2. Tap the **Setting** tab.
3. Tap the **Mail** option.
4. Tap inside the **Signature** area and enter the text for your desired signature.

**NOTE:** Images are not supported in the GoldMine Mobile email signature.

## Contact

Change the default settings used for creating Contact records. Then, tap **Done** to save any changes.

- **Default Record Type**

The Default Record type is the type of record that is created when you add a new Contact record (see "[Add Contact Record](#)" on page 29).

To set the default record type, tap a **down arrow** button ▼ to select from a list of available record types.

- **Phone format**

Check **ON** or **OFF** to set the **International** option. This sets the phone number format for international calling (outside of the U.S.A.) to include both country code and local number.

- **Duplicate Checking**

Check **ON** or **OFF** to set the following options:

- Contact & Company** - checks for duplicate contacts and companies.
- Phone** - checks for duplicate phone numbers.
- Email** - checks for duplicate email addresses.

## Theme

There are several different themes you can choose from. These themes alter the window colors and buttons. To change the theme, select one of the available options.

- **Dark Blue**
- **Light Blue**
- **Black/White/Orange**
- **Black/Blue**

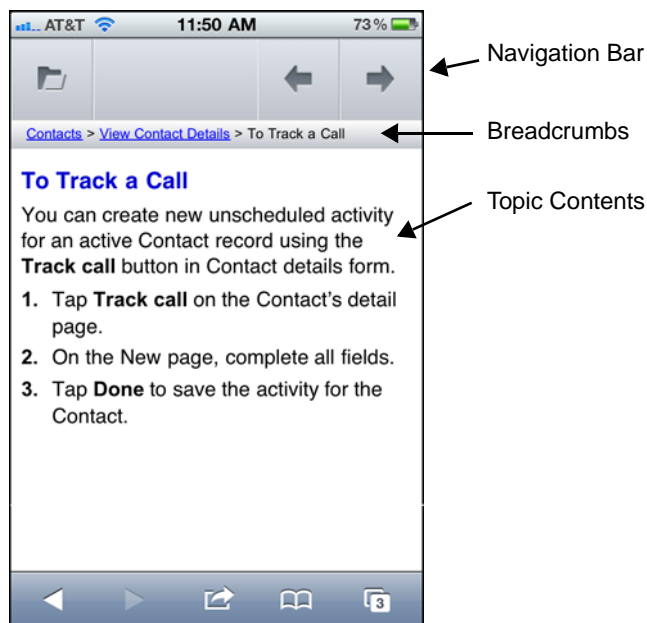
## Login

By default, GoldMine Mobile opens to the last viewed object/record that was open when the user logged out. To change this option, tap the **OFF** button next to the **Restore last viewed object** field. Tap **ON** to re-enable this feature.

# Viewing GoldMine Mobile Help

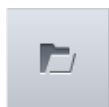
Online Documentation is made available to all GoldMine Mobile users through the [More \(see page 31\)](#) button on the [Tab Bar \(see page 24\)](#). By clicking the Help link, the users can access the information related to using GoldMine Mobile on their mobile device. Installation and configuration content is only available in the *GoldMine Mobile Edition Installation and User Guide* pdf.

## Online Help Navigation



**Breadcrumbs** are navigation aids located at the top of each topic screen. They describe the path to the currently viewed topic, as well as linking text back to the parent topic.

The **Navigation Bar** is located at the top of the Online Help screen and contains buttons to open the Table of Contents and move through the topics (see below).



The **Folder** button opens the Online Help Table of Contents. Headings can be tapped or expanded to view additional subtopics.



The **Next** button moves to the next topic in the Online Help.



The **Previous** button moves to the previous topic in the Online Help.

**NOTE:** Using the navigation buttons on the browser can navigate away from the Online Help file set. When viewing the Online Help, use only the Online Help Navigation buttons to move between topics.

**TIP:** If you inadvertently tap one of the browser's navigation buttons, tap the Folder button at the top of the screen to return to the list of topics.



# Resources

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## Additional Documentation

In addition to this guide, the following resources are available to provide you with information about GoldMine:

- **Online Help** - Accessed by clicking the Help menu option in GoldMine, Online Help provides topic overviews and step-by-step instructions to walk you through basic tasks, in addition to a comprehensive table of contents, index, and search function.

**TIP:** Guides are also available in PDF format from the Installation kit for maintenance customers at:

<http://www.frontrange.com/support>.

- **Training Courses** - Information regarding training courses for FrontRange Solutions family of products can be found at:  
<http://frontrange.learn.com>
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## Contact Us

### Support Site

FrontRange Solutions can answer your technical support questions about HEAT, FRS Foundation, GoldMine, and other FrontRange product families. Visit:

<http://www.frontrange.com/support>

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