

CASTELLE

**FaxPress™
and
GoldMine® Integration**

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Benefits of FaxPress and GoldMine Integration

FaxPress network fax servers support GoldMine 3.x through 6.x.

FaxPress integration with Goldmine enables:

- broadcast of customized faxes to a GoldMine contact list, with full GoldMine fax merge support.
- easy broadcasting of fixed documents to GoldMine contacts
- quick faxing to a GoldMine contact without needing entry of destination fax number, name etc

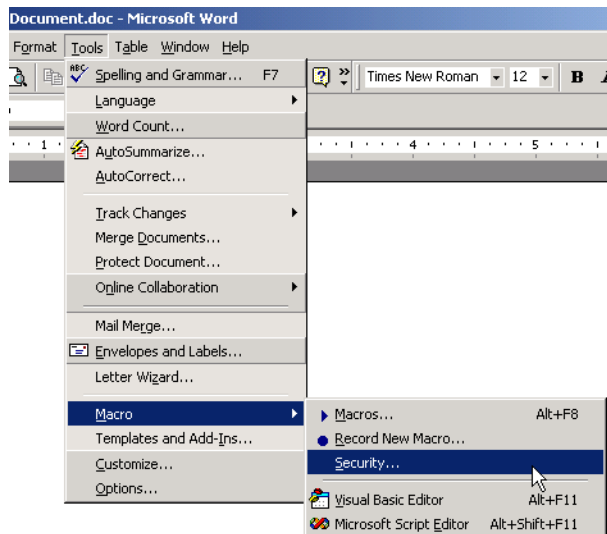
Installing the FaxPress GoldMine link provides convenient new options in Word and in GoldMine. After the installation, your Word documents will include a **GoldMine** option in the menu bar, and a **GoldMine Contact via Castelle FaxPress** option under **File>Send to**.

In the GoldMine program, the **Fax via FaxPress** option will be added into the **File** menu. This option launches the FaxPress **Send Fax** dialog box and automatically connects it to your Goldmine Contacts List.

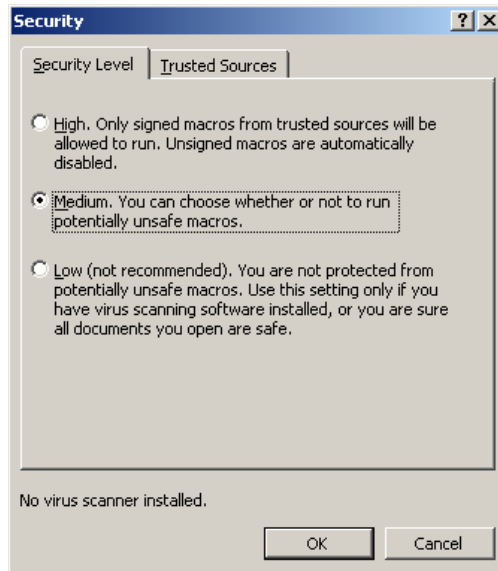
Preparing for the Installation

Before you begin the GoldMine to FaxPress Link installation, confirm the following:

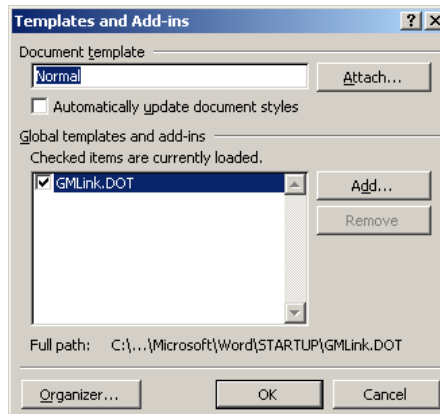
1. Confirm FaxPress client software is installed. To use a GoldMine/FaxPress connection, you must be running FaxPress 6.0 or above client software.
2. Make sure all open applications are closed before beginning the install.
3. Confirm the Microsoft Macro Security settings are set to **Medium** or **Low**, by opening a Word document and going to **Tools> Macro>Security..**



If your security option is set to **High** make sure you change it to **Medium** or **Low**.



4. Make sure the Microsoft dBase driver for ODBC (Open Database Connectivity) is installed and made available as a data source. 32-bit ODBC must also be installed. If the dBase driver is not enabled, and ODBC is not already installed and operational, please see **Installing 32 Bit ODBC and DAO on page 15**.
5. Open a Word doc, and go to **Tools>Templates and Add Ins** to confirm that only **gmlink.dot** is listed under **Global Templates and Add-ins**.



Frequently, other macros will need to be removed from Templates and Add-ins, like Adobe Acrobat Reader or Writer templates. You will also need to delete these using Windows Explorer in addition to removing them. The GMLink.dot file should also be removed, manually, as described below.

Installing the Goldmine to FaxPress Link

The Goldmine to FaxPress Link creates the **Fax via FaxPress** option in the Goldmine **File** menu. This option launches the FaxPress **Send Fax** dialog box and automatically connects it to your Goldmine Contacts List.

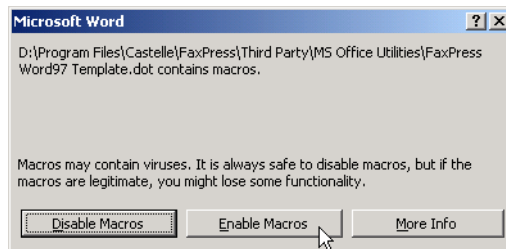
The GoldMine to FaxPress Link installation must not be done on top of an existing GoldMine Link to Word. **Any currently installed GoldMine Link to Word must be removed before the GoldMine to FaxPress Link installation.** The FaxPress Goldmine link will not be installed if the existing GoldMine Link to Word is not removed, but there will be no error message notifying you the link installation was not successful..

To remove any existing GoldMine Link to Word, follow these steps:

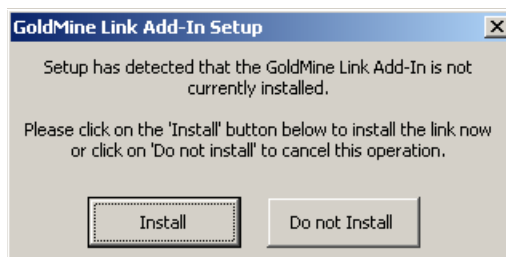
1. Run the **gmlinkinstaller.exe** file, then follow the prompts to remove the currently installed GoldMine Link to Word.
2. Confirm that the existing GoldMine link to Word has been removed by making sure that the GoldMine dropdown menu no longer appears in your Word documents. If you **can** still see the Goldmine dropdown menu from an open Word document, uninstall the link from the GoldMine dropdown menu.
3. Do a search (**Start>Find Files or Folders**) for the files **Gmlink.dot** and **Normal.dot** and remove them.

To install FaxPress/GoldMine link, follow these steps:

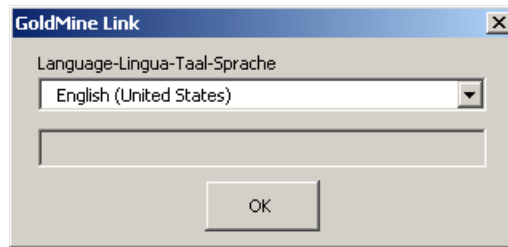
1. Exit all other applications.
2. Start GoldMine.
3. Go to **Start>FaxPress>GoldMine>Install GoldMine 6.0.**
4. If a warning about macros appears, choose **Enable Macros**.



5. Next click on **Install**.



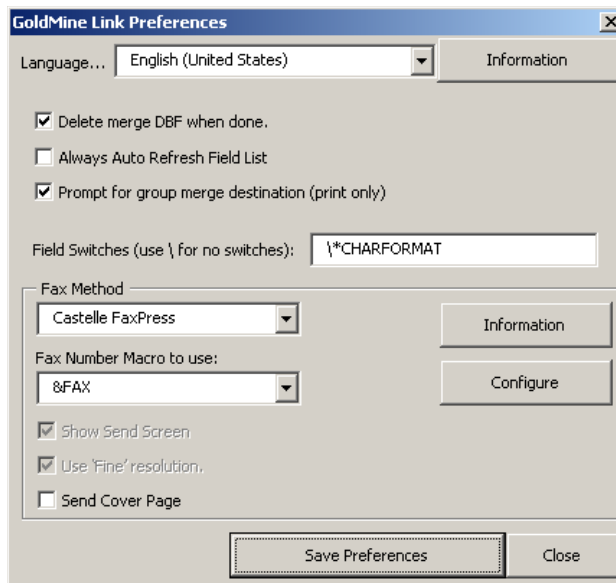
6. Next click on **OK**



7. Next click on **OK**.



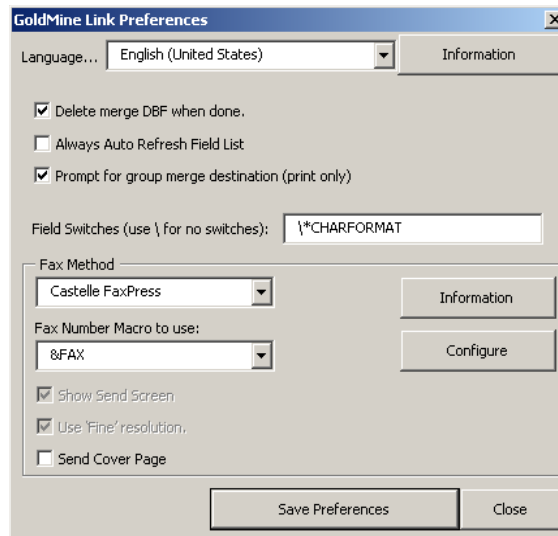
8. Next click on **Configure**.



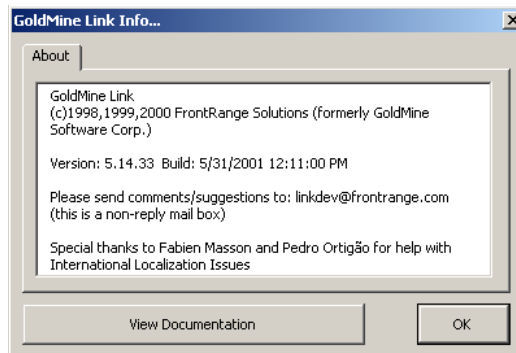
9. Next chose a FaxPress server and put in a FaxPress user name and password, then click on Login.



10. Next you must click on **Save Preferences**



11. Click **OK**.



The GoldMine link should appear under MS-Word tool bar.

Installation Tips

If you are having issues with the FaxPress GoldMine Link support, please check first whether you can install the GoldMine Link without FaxPress involved.

If you are having problems with the GoldMine Link, check the following pre requisites first, then manually uninstall and reinstall the GoldMine Link to make sure it is working without FaxPress involved.

If you're experiencing some issues with your GoldMine link install, check these

- Some Antivirus Software may be running and not allowing the macro to be installed. Always shut down your AntiVirus software.
- If you are doing a manual re-install, try getting a fresh link copy from Castelle's download site as your copy of the link may be corrupt.
- Find out whether or not Local Admin Rights are required for this procedure. Right click on My Computer, then select Manage, then Local Users and Groups to confirm.
- Make sure a local security policy isn't blocking you from installing (Start >Settings >Control Panel >Admin Tools >Local Security Policy).

Uninstalling the Goldmine to FaxPress Link

To uninstall the Goldmine to FaxPress link:

1. Go to **Start>FaxPress>GoldMine>Install GoldMine 6.0**

Note: If a warning about macros appears, choose **Enable Macros**.

2. Click the **Uninstall GoldMine to FaxPress Menu** button to remove the FaxPress/GoldMine link.
3. Close the installation document and restart GoldMine.

The connection between FaxPress and GoldMine has now been broken.

Faxing with the GoldMine/FaxPress Connection

There are several ways to fax with the link between FaxPress and Goldmine. From within GoldMine, users can send faxes through Faxmain or can use the merge mechanism provided by GoldMine. Additionally, automated processes can be set up.

Faxing with the FaxPress Link

To Fax from Goldmine via FaxPress link:

1. Open Goldmine and activate the contacts or groups that you want to send a fax.

2. Select the **Fax via FaxPress...** from the **File** pull down menu in your Goldmine menu bar. The **Goldmine Record Range** screen will be displayed.

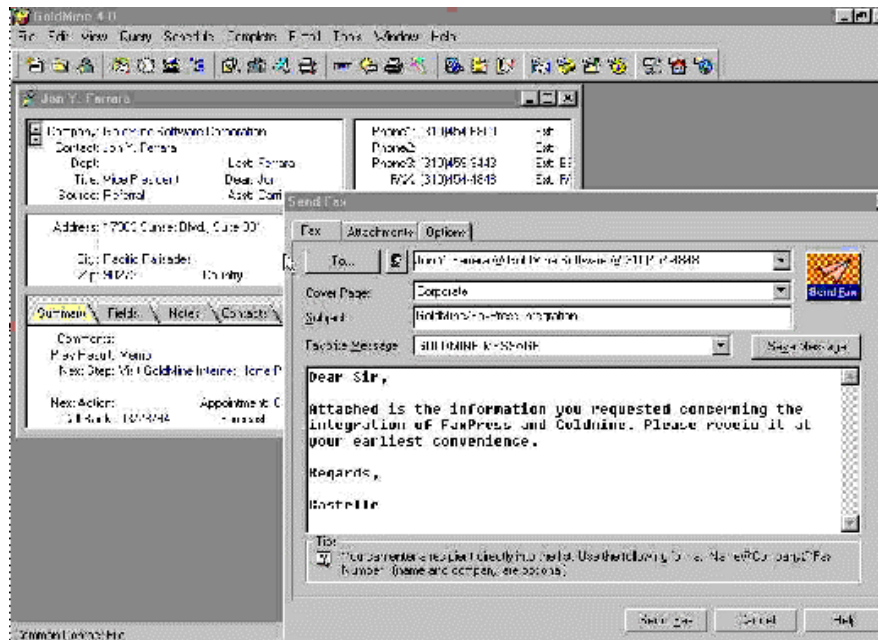


3. Select **Current Contact** to send the fax to the activated contact or **All Contacts** to send to all.

Note: If you have not activated a contact or group this fax will be sent to all contacts in the database.

4. If you have not activated automatic login to Faxmain, the **FaxPress Login** screen will be displayed. Fill in your user name and password.

The **Send Fax** dialog box will pop up with the recipient information from the GoldMine database already embedded.



5. Complete the dialog box by adding a message, choosing a cover page or adding any attachments.
6. Once the dialog box is filled out, click on **Send Fax**.

The fax will be sent to the contact or list of contacts specified.

Entries will be added to each contacts history list indicating that the fax has been sent, subject of the fax, and list of any attachments to the fax.

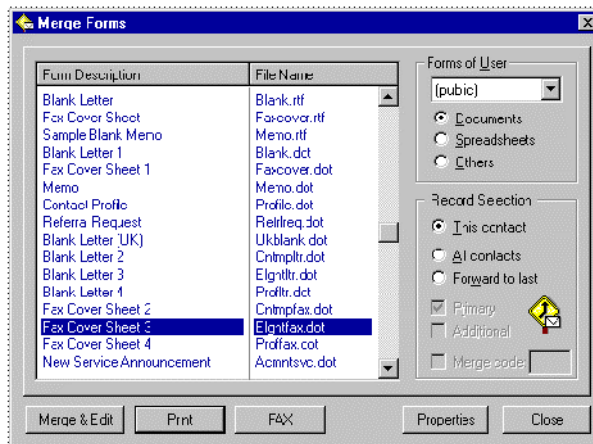
Date	User	Activity	Result	Reference
Mar 18, 99	MARMENTZ	Form		Fax Cover Sheet 3
Mar 18, 99	MARMENTZ	Form		Fax Cover Sheet 3
Mar 18, 99	MARMENTZ	Form		Blank Letter 3
Mar 18, 99	MARMENTZ	Form		Fax Cover Sheet 4
Mar 18, 99	MARMENTZ	Form		Fax Cover Sheet 4

You will be able to obtain status information about the fax transmission by checking the Outgoing Faxes or Notices list in FaxMain. See **Chapter 18, "Notices and Alerts"**.

Faxing Merged Forms

With the merge feature, you can add specific information to documents that you use frequently. Merging GoldMine data and a template document will allow you to create customized faxes specifically made for that contact.

1. Select the **Merge Forms** from the **File** pull down menu in your Goldmine menu bar.



2. Choose a document/form to merge. Any template may be used from any user in the **Forms of User** combo box as long as the **Documents** option is selected.
3. Specify record selection from the following options:
 - **This Contact**—will fax to the currently active contact record,
 - **All Contacts**— will fax to the currently active filtered list or group of contacts
 - **Forward to Last**— will fax to all contacts starting from the current active record, taking all filters and groups into account.
 - **Primary**— will only fax to the primary contact of the record and selecting

- **Additional**— will fax to the additional contacts of the same record.

If both **Primary** and **Additional** are selected, then faxes will be generated for the Primary and Additional contacts.

4. Click on **FAX** at the bottom of the screen.

The FaxPress/GoldMine connection software will automatically launch MS-Word, merge information into the document and then send the document to all the contacts specified. After the fax has been submitted to the FaxPress, a message appears notifying the user that the fax has been sent successfully.

Entries will be added to each contacts history list indicating that the fax has been sent and the name of the merged document.

Merging from MS Word

Faxing to a Single Contact from MS Word

The user can fax the current active MS Word document to the current contact in GoldMine. The document may or may not be a GoldMine template.

1. Make sure that the GoldMine contact who is to receive the fax is the current contact in GoldMine. This means that the contact record is on top and is being viewed.
2. In Word, select **Send to Contact via Fax...** from the **File** pull down menu.

This will fax the document to the current contact using the name, company, and fax information. The FaxPress login dialog box may appear depending on the settings that were set using the **FaxPress Login** menu.

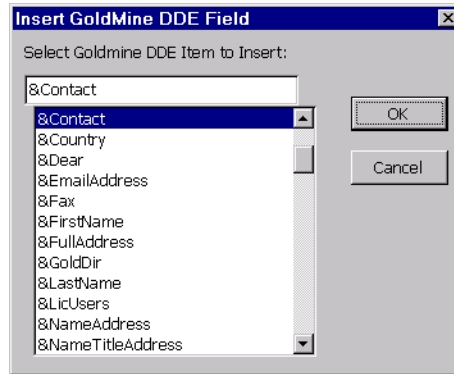
Creating Templates

You can create a GoldMine template, insert information into it from a GoldMine contact database, and send the merged documents as faxes.

To create a template, follow the steps below. For more information about creating templates, see the appropriate section in the GoldMine manual.

1. Create a new Microsoft Word document and include all the text and graphics that will stay the same for each version of the merged document.

- Place your cursor at the desired location and then, from the MS-Word **Insert** menu, select **GoldMine Field...** The **Insert GoldMine DDE Field** dialog will appear.

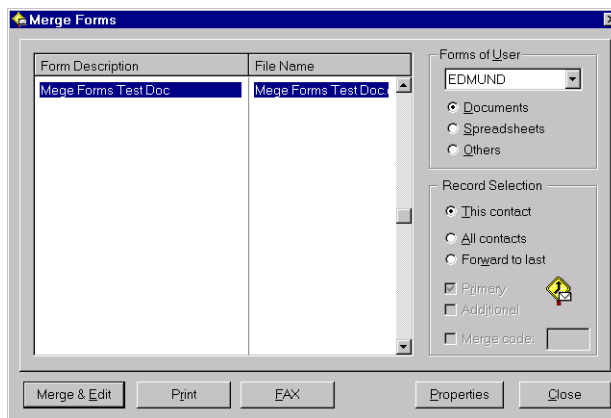


- Select the desired field names from the list and then press the **OK** button. The selected fields will be placed into the template document.
- Repeat insertions as needed to add additional Goldmine fields.
- Save the template by selecting **File / SaveAs GoldMine Template...**

If the document has not been previously saved, you will be prompted for a document title file name to save it. This will make an entry in the **GoldMine Merge Forms** window.

- The template document you just created will now be available from your list of merge forms.

To verify that this operation was successful, select **Merge Forms...** from your GoldMine **File** menu to bring up the **Merge Forms** dialog:



The forms will be listed number the name of the current Goldmine user displayed in the **Forms of User** scroll down list.

7. Selecting the document and clicking the **Properties** button will bring up the properties of the document:

- **Form Name** field should contain the title of the document
- **Template Filename** field should contain the full path to the Word document
- **App Identifier** field should contain “Word.Document.8”
- **DDE Command** field should contain “[GoldMineLink()].” If these settings are not correct, a GoldMine merge using this template will not work.

Updating GoldMine Templates

If you change a GoldMine template document, you must also update the GoldMine form record for the template.

A form record contains a list of all the merge fields that are in the template, so that GoldMine can export a dBase file containing the correct fields for merging purposes.

If a document is changed and the form record is not updated, fax merge may not work correctly because the exported file may or may not contain the necessary fields that are required for the merge.

There are several ways to update the form record corresponding to the template.

Updating Templates from within MS Word

1. From within Word, open the template.
2. Make the changes: adding and/or deleting GoldMine fields as necessary.
3. From the File menu, select **Update GoldMine Template...**

This will update the form record automatically and save the changes to the template.

Updating Templates from within GoldMine

1. From the GoldMine **File** menu, select **Merge Forms...** to bring up the **Merge Forms** dialog.

2. Select the template that needs to be updated and then click on the **Properties** button to bring up the **Form Template Properties** dialog.
3. Click on the **Edit** button. This will launch Word with the template for editing.
4. Make the changes: adding and/or deleting GoldMine fields as necessary.
5. From the File menu, select **Update GoldMine Template...** This will update the form record automatically and save the changes to the template.

Configuring FaxPress Login

To automate faxing, you can configure the login parameters that will be used to send the faxes to FaxPress.

To configure FaxPress Login, do the following.

1. From Word, select the **Tools** menu and then select **Configure FaxPress Login...** This will bring up the **FaxPress Server Login** dialog box.



2. Specify the **Server** name, **User Name** and **Password**. You may need to check with your system administrator to determine these items.
3. Check the **Use These Settings Next Time** check box to retain these settings.
4. Click on the **Login** button

The next time you fax something from within GoldMine, these server settings will be applied.

Automated Faxing

You can also send faxes to GoldMine contacts using GoldMine Automated Processes, if you have previously set up the process to fax a document using the **Print Form** option.

When a fax is sent using Automated Faxing, an entry is made to the contact history.

For more information about Automated Faxing, see your GoldMine manual.

Installing 32 Bit ODBC and DAO

Open Database Connectivity (ODBC) is an open standard application programming interface (API) for accessing a database. By using ODBC statements in a program, you can access files in a number of different databases, including Access, dBase, DB2, Excel, and Text. In addition to the ODBC software, a separate module or driver is needed for each database to be accessed.

Installing ODBC

ODBC is already installed on Windows Me, Windows XP, Windows 2000 Professional and 2000 server, and may already be installed on your workstation or server. To determine whether or not ODBC is already installed, search for the file "odbc32.dll" or "odbc*.*" If you do not have a 32 Bit ODBC installed on your machine, you can install it from your FaxPress CD.

To install a 32 Bit ODBC, click on MDAC_TYP.EXE. The 32 Bit ODBC will be installed on your desktop.

Microsoft's Data Access Objects (DAO) 3.6

DAO (Data Access Objects) is an application program interface (API) available with Microsoft's Visual Basic that lets a programmer request access to a Microsoft Access database. DAO contains the library files for Microsoft's Jet database engine, which is used to access Microsoft Access databases.

DAO is already installed on Windows Me, Windows XP, Windows 2000 Professional and 2000 server, and may already be installed on your workstation or server. To determine whether or not DAO is already installed, search for the file "dao360.dll" or "DAO*. *"

DAO 3.6 is provided on the FaxPress installation CD, in the Microsoft folder in the ODBC installation folder. **You will only need to install the ODBC if it doesn't already exist.**

Follow these instructions for the installation of the ODBC, DAO drivers & Jet 4.0.

Windows 98 NT 4.0

Run Mdac_typ25.exe, this is provided on the FaxPress installation CD in the \Microsoft\odbc installation directory

For NT 4.0 prior to SP3 run Mdac_typ21.exe.

Registering DAO 3.6

Create a directory with the name DAO under System Drive:\Program Files\Common Files\Microsoft Shared and copy Dao360.dll to this directory. This .dll is provided on the FaxPress installation CD in the \Microsoft\odbc installation directory.

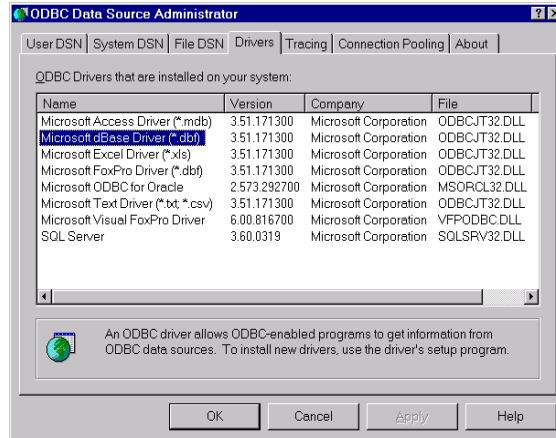
In addition, Dao360.dll must be registered as a COM DLL. This can be accomplished by using the Regsvr32.EXE utility, e.g.

```
RegSvr32 "C:\Program Files\Common Files\Microsoft Shared\DAO\Dao360.dll"
```

Installing ODBC Drivers

Check Status

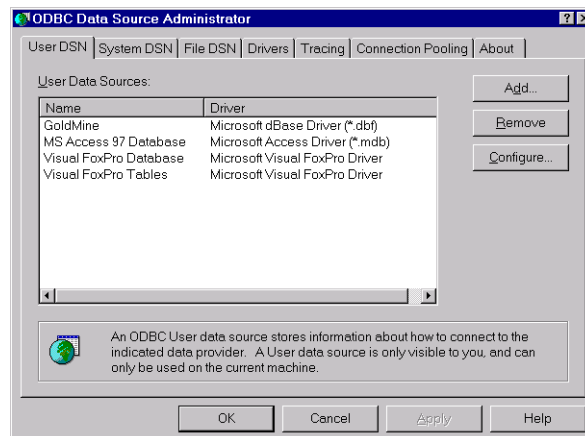
To check that the required ODBC driver is installed, double-check on the **ODBC** icon and inspect the **ODBC Data Source Administrator** screen. Select the **Drivers** tab and make sure that the driver corresponding to the data source you will be using is available.



Adding a New Data Source Name

If your data source is a dBase file, then the **Microsoft dBase** driver must be available as a **User DSN** or a **System DSN**. To check if the dBase driver is available as a data source, do the following.

1. Select the **User DSN** or **System DSN** tab. Two columns, a **Name** column and a **Driver** column, are displayed.



2. Check to see if the **.dbf** driver is there.

Look through the list and make sure that the **Driver** column contains the **Microsoft dBase Driver (*.dbf)**. The corresponding **Name** does not matter.

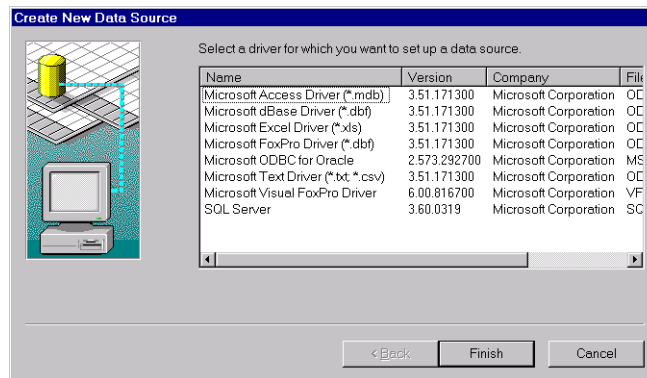
If the driver is not present, look in the other tab (in the above case, check the **System DSN** tab).

Where the dBase driver is located does not matter as long as it is present in one of these locations. The only difference is that the **User DSN** can only be seen by the current user that is logged into the workstation, while the **System DSN** can be seen by all users who login to the same workstation.

3. Install the dBase driver if needed.

If you need the dBase driver, you can add it by doing the following.

- a. Click on **Add**.
- b. Select either the **User DSN** or **System DSN** tab and click on the **Add** button. The **Create New Data Source** dialog will be displayed.



The list of available drivers depends on the drivers that are currently installed on the system.

- c. Select the **dBase** driver.
- d. Select the **Microsoft dBase Driver (*.dbf)**.

4. Click on **Finish**.

Click on the **Finish** button. The **ODBC dBase Setup** dialog will appear.



5. Enter a **Name** and, optionally, a **Description**.

Data Source Name— Enter a name for **Data Source Name** field. This is required.

Description— Enter a description for the **Description** field. This is optional.

Version— Make sure that the **Version** corresponds to the version of the dBase file or higher.

6. When done, click **OK**.