



MailGo 1.2 for GoldMine

Product Manual

April 2015

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MailGo 1.2

How MailGo works

Imagine having a GoldMine user who sits in front of GoldMine 24 hours a day dutifully watching their calendar for next actions that instruct them to send out template-based e-mail messages to your customers, their associates, and/or other GoldMine users. Wouldn't this employee be useful for making sure that your e-mail marketing messages, newsletters, alerts, referrals, etc. arrived at exactly the right time you've determined to be optimal?

That's what MailGo does. MailGo acts as your team's invisible marketing assistant. The program runs on a machine in your network with access to your GoldMine's SQL database and constantly watches the calendar of a dedicated username for instructions via scheduled Next Actions with specially-formatted instructions in the notes field. These instructions include details about the message(s) to be sent.

Manually scheduling actions for MailGo is only scratching the surface of the automation opportunities presented by this synergy with the GoldMine calendar, however. A whole new level of marketing automation can be achieved by utilizing GoldMine's Automated Processes to schedule items for MailGo based on conditions in the GoldMine database. With thoughtfully constructed Automated Processes, you could:



- alert customers (or your own staff) to approaching deadlines
- notify 3rd parties of customer milestones
- welcome new customers who visit your website and fill out GoldMine Web-Import-linked forms
- send your customers legal documents or other important forms at the right time

Installing MailGo

Run the setup file called **mailgo_setup.msi** or **setup.exe**. The difference between the two being that **setup.exe** will also install .NET framework prerequisites.



Hit Next



Review, select **I Agree** and hit next



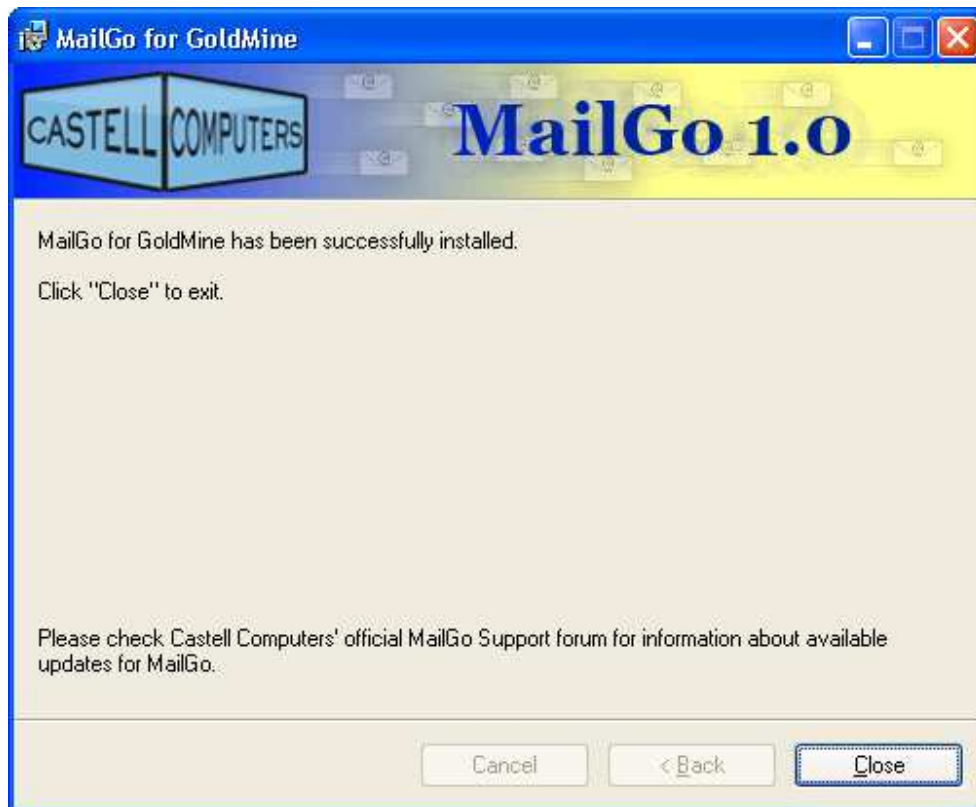
Select your preferred installation folder and user options and hit next.



Hit Next



Enjoy the progress bar...



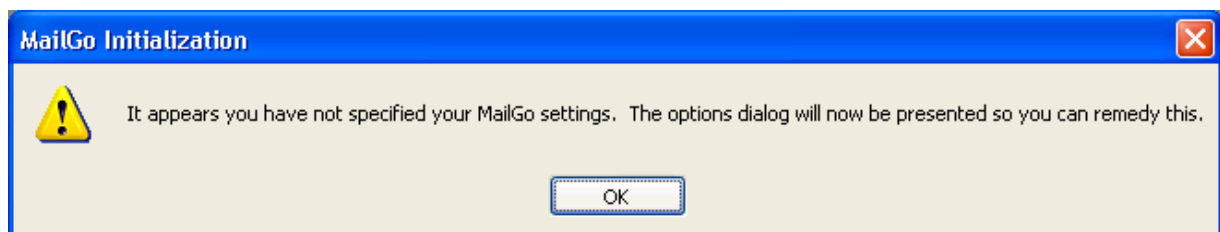
Hit Close, installation is now complete.

The official support forum for MailGo is located at

<http://www.castellcomputers.com/contactreview/phpbb2/viewforum.php?f=32>

Launch MailGo using the "MailGo 1.2" shortcut added to your Start Menu and Desktop.

MailGo will recognize that it has not yet been setup:

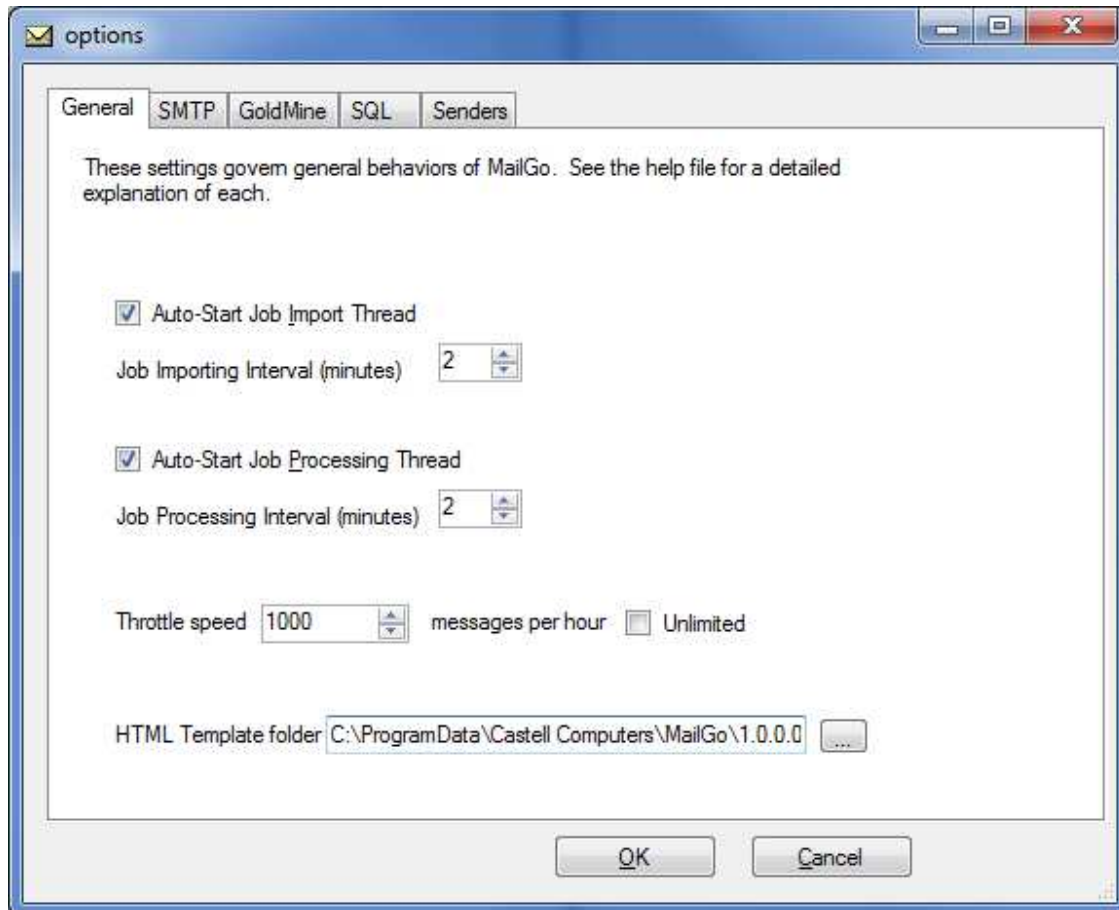


Upon clicking OK, you will be presented with the MailGo options screen.

MailGo Options

The five tabs in the MailGo options area allow you to define how MailGo interacts with GoldMine, your SQL and SMTP server and provides

General Options

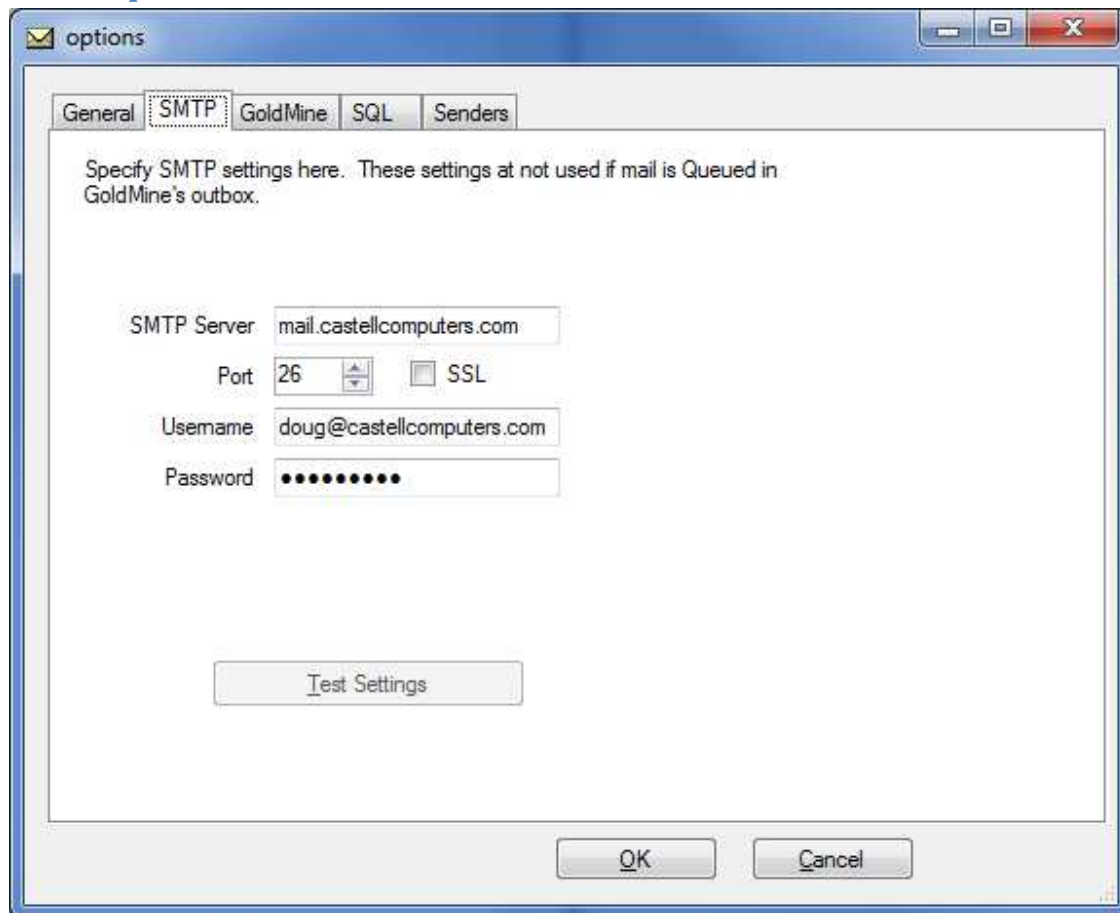


The Auto-Start options define what happens when you run MailGo. **The Job Import thread** is the one that checks MailGo's GoldMine calendar and the **Job Processing thread** is the one that sends out e-mail. Set your intervals accordingly.

If you'd like to limit the number of messages that MailGo sends to your SMTP server, adjust the **Throttle Speed** accordingly, otherwise, select 'Unlimited'.

The **HTML Template Folder** is the default location for the storage of e-mail templates documents. When scheduling MailGo jobs, you can optionally indicate to pull the body of your e-mail from html documents placed here. Note that this path is defined *in relation to the machine running MailGo*. If you use a mapped drive, be sure it's accessible to the windows user who will typically be running MailGo.

SMTP Options



MailGo is not a mail server. MailGo sends out e-mail using the SMTP server settings you provide.

If you are sending mass marketing messages, it's typically advisable to utilize servers other than your own e-mail provider (or Gmail, etc.) to avoid having your mail server/account banned or black-listed.

Popular paid SMTP options include:

- [SMTP.COM](#)
- [Mandrill \(MailChimp\)](#)
- [MailJet](#)
- [SendGrid](#)
- [Amazon Simple Email Service](#)

GoldMine Options

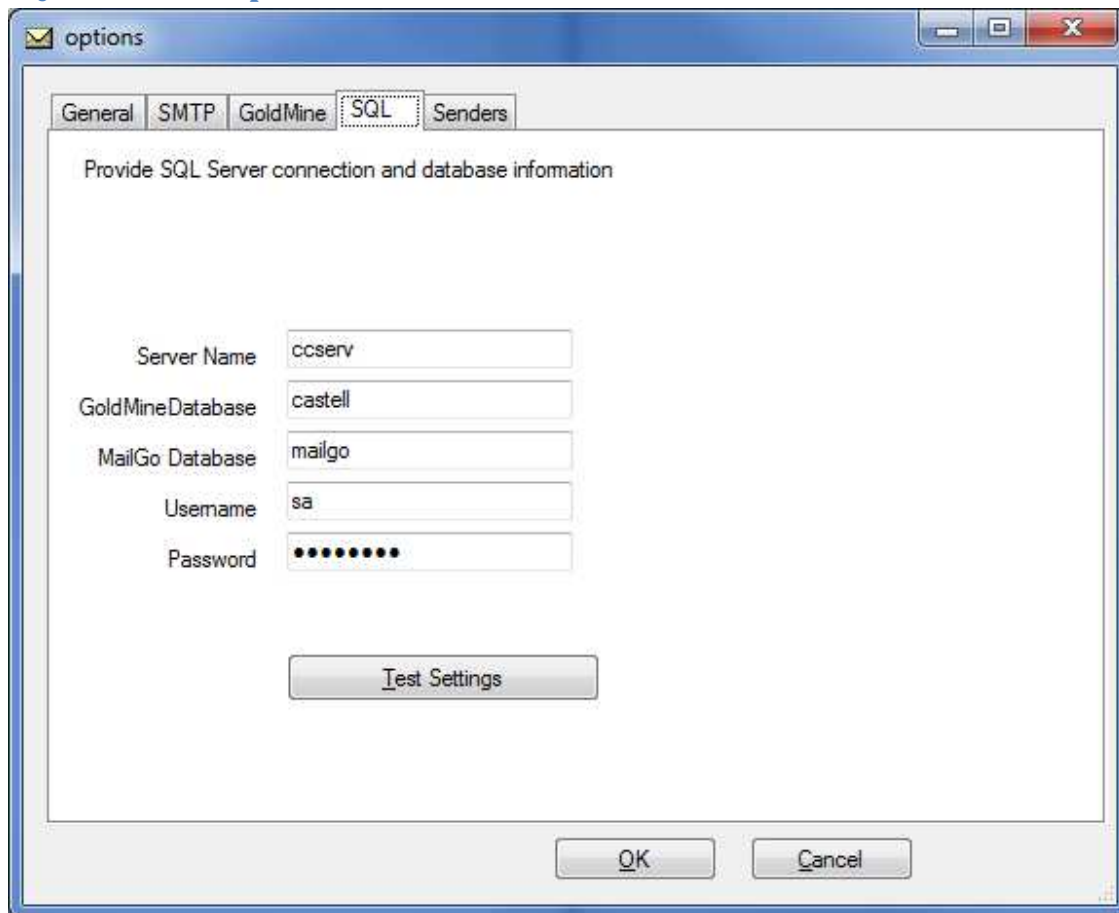
The screenshot shows a Windows-style dialog box titled "options" with a tabbed interface. The "GoldMine" tab is selected. The dialog contains the following elements:

- Instructional text: "Specify your GoldMine settings here. The GoldMine username will be the username whose calendar will drive MailGo jobs (next actions with a reference line of 'MailGo Instructions')"
- Fields for "Username" (containing "email") and "password" (containing five dots).
- A "Get From GoldMine" button next to the password field.
- A "sysdir" field containing "p:\goldmine\" with a browse button.
- A "golddir" field containing "castell:".
- A "commdir" field containing "castell:".
- Two checkboxes: "Queue Mail in GoldMine's Outbox (do not send via SMTP)" (unchecked) and "Save Completed Jobs in History" (checked).
- A "Test Settings" button.
- "OK" and "Cancel" buttons at the bottom.

Specify the settings MailGo should use to communicate with your GoldMine installation here. If GoldMine is running, you can use the “Get From GoldMine” button to populate most of the settings (other than password.)

The GoldMine Username specified here is the same one MailGo will depend on for scheduled activities. This should not be a user who will also be using GoldMine for every-day work. This should be a dedicated username you’ve created for MailGo’s purposes. Popular choices for the username are MAILGO, EMAIL, MARKET, etc.

SQL Database Options



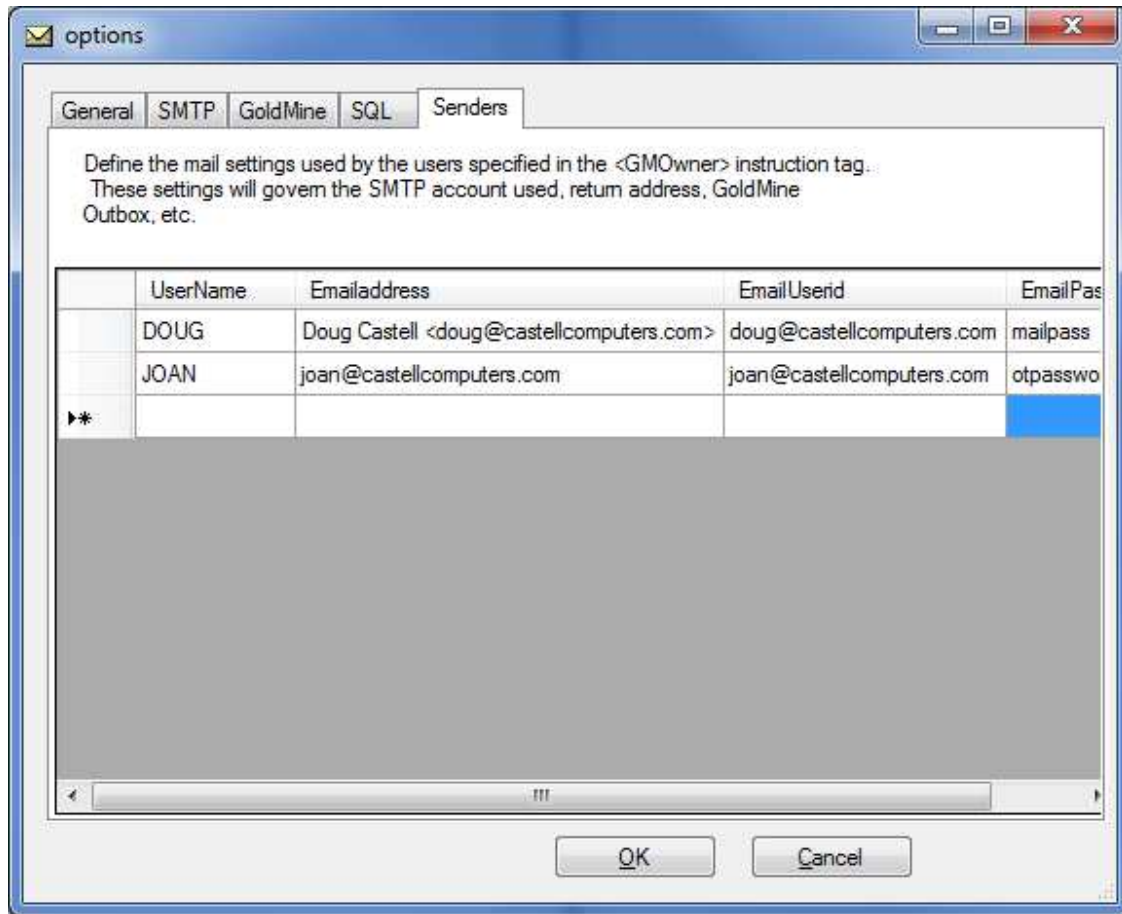
The screenshot shows a Windows-style dialog box titled "options" with a tabbed interface. The "SQL" tab is selected. The dialog contains the following fields and controls:

- Server Name: ccserv
- GoldMineDatabase: castell
- MailGo Database: mailgo
- Username: sa
- Password: masked with 10 dots
- Test Settings button
- OK button
- Cancel button

These settings should reflect the direct SQL connection to your GoldMine and MailGo databases. Your MailGo database can be the same database as your GoldMine database or it can be an empty database that you create on your SQL server.

Note that MailGo will not create the MailGo database for you. Given that your server/database administrator will probably wish to have some control over where the MailGo database resides on the server and how it fits in with the SQL maintenance and backup plans, I've left it up to you to have a database in-place prior to this step.

Sender Options



Sender options define the e-mail account (and account settings) that correspond to your various GoldMine usernames. These settings will be used to define SMTP credentials and sender/return address information on e-mails coming from your users.

Using MailGo

Telling MailGo what to do is easy: Schedule a Next Action in GoldMine. You might choose to schedule single, recurring or group actions. You could schedule these items directly or via an Automated Process -- or even via the GoldMine API. No matter how the activities make it to MailGo's GoldMine calendar, as long as they're properly formatted, MailGo will take appropriate action to complete them.

For MailGo to see and understand your instructions:

- the activity must be scheduled for the **MailGo user** (as specified in the MailGo options)
- the activity type must be a **Next Action**
- the reference line of the scheduled item must be "**MailGo Instructions**" (without the quotes)
- The detailed instructions must appear in properly-formatted XML in the notes area of the scheduled activity (detailed below)

MailGo pays attention to the time and date of the action and doesn't take action until it's supposed to. If you tell it to send out 500 e-mails on the first Monday of each month by carefully scheduling your next actions using GoldMine's powerful recurring activity scheduling abilities, MailGo will do exactly that.



For clarity's sake, see Appendix A for a definition of some commonly used terms.

MailGo Instructions

This section details the XML instructions that will appear in the Notes field of your scheduled Next Actions in GoldMine.

Many of these settings allow for the use of **expressions**. Expressions can be useful when you would prefer that a given value be a derived value -- something other than the explicitly specified text in your MailGo Instructions.



When utilizing an expression for any MailGo value, preface it with a question mark to tell MailGo to not take the value literally but instead pass it to GoldMine or MSSQL for evaluation (ie. *?userdef01*, *?left(contact1.company,5)*, *?age(ubirthday)*, and so on).

Leveraging expressions, you can personalize your message delivery in more ways than just having merge fields in the body of the message.

The screenshot shows the "Schedule a Next Action" dialog box. The "Detail" tab is active. The "Link to selected Contact" checkbox is checked, and "Doug Castell" is selected. The "Reference" is "MailGo Instructions". The "Notes" field contains the following XML:

```
<?xml version="1.0"?>
<MailGoInstructions>
<Subject>Compliance reseller info</Subject>
<GMOwner>?userdef05</GMOwner>
```

 The "Options" section shows "Activity" set to "Next Actn", "Code" is empty, and "Color" is blue. "Opportunity / Project" and "Or Case" are both set to "(none)". The "Primary User" is "EMAIL (Email User)". The "Time" section shows "Date" as 7/23/2012, "Time" is empty, and "Duration" is 0 minutes. The "Actions" section has "Notify via E-mail" checked, and "Auto-generate RSVP", "Mark as Private", and "Send a request with the Next Actn to:" are unchecked. The "Contact(s)" field is empty. "Schedule" and "Cancel" buttons are at the bottom.

A typical Next Action being manually scheduled for MailGo in GoldMine Premium Edition 9.0

<Recipient>

Description: Who the e-mail message will be sent to. This can be the primary contact's primary e-mail address, an e-mail address from a field, a valid dBase expression, or a valid GoldMine user.

Notes:

1. The value must be a *valid e-mail address or GoldMine Username*.
2. Some e-mail address format checking will occur during the Import process. Invalid values will be passed back to the GoldMine user who originally scheduled the Next Action.

This setting is *optional*

Value	Description
<i>(default)</i>	If not specified, the primary e-mail address of the Linked Contact will be the recipient.
<i>Username</i>	An exact GoldMine username. Examples: <Recipient>BOBBY</Recipient> <Recipient>JSMITH</Recipient> <Recipient>SALLY</Recipient>
<i>?expression</i>	A dBase expression to be evaluated by GoldMine against the linked contact. Examples: <Recipient>?ualtemail</Recipient> <Recipient>?key2</Recipient>

<GMOwner>

Description: The *GoldMine Owner* of the message. This controls who the resulting e-mail appears to be from as well as the return address. When templates are parsed for merge fields, this setting will govern which GoldMine user the fields are evaluated against. GoldMine merge codes like <&sigfile>, <&userfullname> (and similar) will be evaluated against the GoldMine username specified as the GMOwner.

Note: The value must be both a valid, Licensed Sender in MailGo and a valid GoldMine User.

This setting is *required*

Value	Description
<i>Username</i>	An exact GoldMine username. Examples: <GMOwner>BOBBY</GMOwner> <GMOwner>JSMITH</GMOwner> <GMOwner>SALLY</GMOwner>
<i>?expression</i>	An expression to be evaluated by MSSQL (not the dBase Expression engine of GoldMine) against the linked contact. Examples: <GMOwner>?userdef05</GMOwner> <GMOwner>?key2</GMOwner> <GMOwner>?left(contact1.company,5)</GMOwner> <GMOwner>?isnull(key4,'MATT')</GMOwner>

<Subject>

Description: The subject line of the e-mail message your recipients see.

Note: Can be simple text or the result of a dBase expression.

This setting is *required*.

Value	Description
<i>text</i>	<p>The exact subject to be displayed</p> <p>Example:</p> <pre><Subject>More information about the product you requested</Subject></pre>
<i>?expression</i>	<p>A subject including inserted field codes</p> <p>Examples:</p> <pre><Subject>Dear <&contact>>, this is your lucky day!</Subject> <Subject><&userfullname>> wants you to know!</Subject></pre>

<GMTemplate>

Description: What template text will be used for the body of the message. The body of the e-mail will be drawn from the specified GoldMine e-mail template. The template body is parsed for standard GoldMine-style merge fields (including user-specific things like <&sigfile>)

Notes:

- The specified GoldMine e-mail template cannot have an attachment in GoldMine. See the <Attachment> instruction to specify an e-mail attachment.
- Avoid special characters in your e-mail subject line (apostrophes, quotes, parenthesis, etc.) as they could confuse MailGo.

This setting is *required* (when using a GoldMine Template-based template body.)

Value	Description
<i>Template</i>	The full and exact template subject line from within GoldMine Examples: <GMTemplate>Information about widgets</GMTemplate> <GMTemplate>Check out our awesome website!</GMTemplate> <GMTemplate>Your Favorite Newsletter – July 2012</GMTemplate>

<GMTemplateUser>

Description: The GoldMine user who owns the specified e-mail template inside GoldMine.

This setting is *required* (when using a GoldMine Template-based template body.)

Value	Description
<i>Username</i>	An exact GoldMine username. Examples: <GMTemplateUser>BOBBY</GMTemplateUser> <GMTemplateUser>JSMITH</GMTemplateUser> <GMTemplateUser>SALLY</GMTemplateUser>

<TemplateFile>

Description: Specifies an external file containing template text to be used for the body of the message. The template body is parsed for standard GoldMine-style merge fields (including user-specific things like <<&sigfile>>)

This setting is *required* (when using a file-based template body.)

Value	Description
<i>filename</i>	<p>If only a filename specified, the location of the file is assumed to be in the default MailGo template folder (as specified in the MailGo options screen.)</p> <p>Examples: <Attachment>Interesting Stuff.txt</Attachment> <Attachment>SpcFormA123.htm</Attachment></p>
<i>Fully-qualified file location</i>	<p>If a fully-qualified mapped drive or UNC path is used be sure the location is available to the MailGo process/user.</p> <p>Examples: <Attachment>F:\marketing\newsletter attachments\Feb2013\Info about widgets.html</Attachment> <Attachment>\\server1\sprt_att\Install_gd.txt</Attachment></p>

<Priority>

Description: How high-priority is this item? Maybe you have a newsletter constantly going out by the thousands on a daily basis. What if you suddenly have an urgent message that needs to go out to 100 customers *right now*? You wouldn't want to have to wait for the newsletters to finish sending before your urgent message. Just set a higher priority for the urgent items and MailGo will send those before it continues churning out newsletters.

Note: The lower the number, the higher the priority. A priority of 1 is the highest priority and would take precedence over a priority 50 item.

This setting is *optional*.

Value	Description
<i>number</i>	Integer values between 1 and 65535 are valid. Examples: <Priority>1</Priority> <Priority>25</Priority>

<isHTML>

Description: Specifies whether the e-mail is to be sent as plain text or HTML.

Note: 1 means TRUE, 0 means FALSE.

This setting is *optional*.

Value	Description
<i>number</i>	<p>Specifies in the e-mail header whether the e-mail is in HTML format or plain text.</p> <p>Examples:</p> <pre><isHTML>1</isHTML> <isHTML>0</isHTML></pre>

<Attachment>

Description: A file to be attached to the e-mail. The attached file is not parsed for inserted field codes.

Notes:

1. This item is **not parsed** for inserted field codes.
2. Only one attachment can be specified.

This setting is *optional*.

Value	Description
<i>filename</i>	<p>If only a filename specified, the location of the file is assumed to be in the default MailGo template folder (as specified in the MailGo General options screen.)</p> <p>Examples:</p> <pre><Attachment>Interesting Stuff.docx</Attachment> <Attachment>SpcFormA123.pdf</Attachment></pre>
<i>Fully-qualified file location</i>	<p>If a fully-qualified file location specified, that location must be a fully-qualified mapped drive or UNC path. Be sure the location is available to the MailGo process/user!</p> <p>Examples:</p> <pre><Attachment>F:\marketing\newsletter attachments\Feb2013\Info about widgets.pdf</Attachment> <Attachment>\\server1\sprt_att\Install_gd.pdf</Attachment></pre>

<ParseAttach>

Description: A file that is to be parsed against the linked contact record and attached to the e-mail as a PDF. The source file should be in plain text or HTML format.

Notes:

- Regular GoldMine e-mail template-style field codes and expressions are recognized.

This setting is *optional*.

Value	Description
<i>filename</i>	<p>If only a filename specified, the location of the file is assumed to be in the default MailGo template folder (as specified in the MailGo options screen.)</p> <p>Examples:</p> <pre><ParseAttach>Interesting Stuff.txt</ParseAttach> <ParseAttach>SpcFormA123.htm</ParseAttach></pre>
<i>Fully-qualified file location</i>	<p>If a fully-qualified file location specified, that location must be a fully-qualified mapped drive or UNC path. Be sure the location is available to the MailGo process/user!</p> <p>Examples:</p> <pre><ParseAttach>F:\marketing\newsletter attachments\Feb2013\Info about widgets.html</ParseAttach> <ParseAttach>server1\sprt_att\Install_gd.txt</ParseAttach></pre>

Appendix A: Definition of terms

These common terms are used throughout this manual and a thorough understanding of their usage in this context is key to understanding this manual.

Linked Contact (n.) – the GoldMine contact record associated with the scheduled Next Action

Sender (n.) – The GoldMine user for whom MailGo will transmit the e-mail. Licensed Senders are denoted in MailGo's options area. Licensed senders are stored in the mg_users table. To add more than the base-level five Senders, additional Sender licenses must be purchased.

Template Body (n.) – The *message* part of the e-mail message. This is typically comprised of text and images.

Import (v.) – MailGo pulls items from its GoldMine calendar and places them in its own job queue and stored in the mg_jobs table. Once MailGo has imported an item from the GoldMine calendar, it will add a tilde (~) to the beginning of the USERID value of that calendar item. This prevents the same item from being imported a second time and removes it from view/modification inside GoldMine.

Job (n.) – A scheduled e-mail containing the finalized versions of the sender, recipient, e-mail message, etc. and stored in the mg_jobs table. Once a job record is created, it is awaiting processing.

Process (v.) – MailGo carries out its jobs by sending the e-mail messages specified in the job details via the SMTP server specified in the MailGo Options area.

GoldMine Username (n) – The login name that GoldMine users fill in on the GoldMine login screen. This name is typically 4-12 characters long and usually displayed in all-uppercase in the GoldMine interface.

MailGo User (n.) – the GoldMine Username used by MailGo to login to the GoldMine API and the GoldMine calendar on which MailGo's Next Actions will be scheduled.

Appendix B: Example XML MailGo Instructions

Leveraging MailGo's various instructions to deliver your marketing message without having to hand-craft every e-mail is what it's all about. Figuring out how to build the XML to accomplish that without any working examples can be, well, tough, to say the least. Here are a few working examples that provide the same information in a variety of different ways.

Example 1 - Simple GoldMine-template-based instruction

```
<?xml version="1.0"?>
<MailGoInstructions>
  <Subject>Compliance reseller info</Subject>
  <GMOwner>DOUG</GMOwner>
  <Priority>5</Priority>
  <BodySource>
    <GMTemplateUser>DOUG</GMTemplateUser>
    <GMTemplate>Compliance for GoldMine -- E-mail extraction
Tool</GMTemplate>
    <isHTML>1</isHTML>
  </BodySource>
</MailGoInstructions>
```

Example 2 - Specify a sender other than the scheduler

```
<?xml version="1.0"?>
<MailGoInstructions>
  <Subject>Compliance reseller info</Subject>
  <GMOwner>JOAN</GMOwner>
  <Priority>5</Priority>
  <BodySource>
    <GMTemplateUser>DOUG</GMTemplateUser>
    <GMTemplate>Compliance for GoldMine -- E-mail extraction Tool</GMTemplate>
    <isHTML>1</isHTML>
  </BodySource>
</MailGoInstructions>
```

Example 3 - Pull the sender and recipient from contact1/contact2 fields

```
<?xml version="1.0"?>
<MailGoInstructions>
  <Subject>Compliance reseller info</Subject>
  <GMOwner>?userdef05</GMOwner>
  <Priority>5</Priority>
  <BodySource>
    <GMTemplateUser>DOUG</GMTemplateUser>
    <GMTemplate>Compliance for GoldMine -- E-mail extraction Tool</GMTemplate>
    <isHTML>1</isHTML>
  </BodySource>
  <Recipient>?key5</Recipient>
</MailGoInstructions>
```



Note: Copy-pasting these directly to GoldMine's notes field may carry-over HTML formatting for font, color, boldness, etc. It's a good idea to first copy-paste into Notepad in order to strip any unseen formatting.

Example 4 - Use a file-based template from the default template location

```
<?xml version="1.0" encoding="UTF-8"?>
<MailGoInstructions>
  <Subject>Compliance reseller info</Subject>
  <Priority>5</Priority>
  <GMOwner>DOUG</GMOwner>
  <BodySource>
    <TemplateFile>compliance_resell.htm</TemplateFile>
    <isHTML>1</isHTML>
  </BodySource>
</MailGoInstructions>
```