Using the LOOKUP.INI

GoldMine 6.X

This guide is relevant to the following GoldMine version types:

Technical Guide Compatibility

GoldMine Version	5.0	5.5	5.7	6.0 plus versions
	✔	✔	✔	6.0 ✔ 6.5 ✔ 6.6 ✔
Database Type	dBase		SQL	
	✔		✔	
Office Version	V6	97	2000	XP(2002)

Key:
BCM: Business Contact Manager
S&M: Sales & Marketing
MRx: Maintenance Release

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1. Introduction

The **LOOKUP.INI** file is created in the GoldMine root directory (e.g. g:\apps\goldmine) using notepad, Word etc. Once configured, GoldMine will reference the file on startup in order to update fields based on data held in other fields. It is also possible to run applications based on records entered. If you make a change to the lookup.ini file, you should log out and log back into GoldMine.

2. AutoUpdate

The **Autoupdate** section of the LOOKUP.INI will automatically trigger an update to a given contact1 or contact2 field based upon another one.

Example:
In the following example, the GoldMine "Asst" field has been renamed to "First" to hold a contact's first name. Key Field 1 has been configured to hold the salesperson's name and Key 5 has been configured as a flag field to mark accounts that are "protected". Usually accounts will be automatically allocated to salespeople by postcode areas, but if a salesperson has a vested interest in an account that falls outside their own territory, it can be reserved for them by entering "Yes" into this field.

I want to automatically complete the "Dear" field using a formal salutation if I do not know the contact's first name. Once I get to know them and wish to address them on first name terms in a letter, I complete the "First" field that automatically updates the "Dear" field with the informal salutation. This assumes that Contact names are always entered into GoldMine in a standard way including a prefix – e.g. Dr Ian Smith, Mr Peter Robinson.

CRITERIA FOR THE WHOLE LOOKUP.INI.	
[AutoUpdate]	Required syntax to start the process whereby one field can be updated by another
Dear=Dear	Examine the contents of the Dear field and update the Dear field according to instructions
Secr=Dear	Examine the contents of the Secr field (here used as firstname) and update the Dear field according to instructions.
NewRecord=Dear, Secr	If a new record is added to the database, update the Dear field and the Secr field.
Contact=Dear	Examine the contents of the Contact field and update the Dear field accordingly.
Zip=Key1	Examine the contents of the postcode field and update Key Field 1 (here used as salesperson accordingly).

INSTRUCTIONS FOR THE DEAR FIELD	
[Dear]	Field to be updated, in this case Dear
Lookup1=&IIF(TRIM(contact1->secr)>"","T","F")	As this is Lookup1, this instruction will be performed first. This expression examines the Dear field to see whether or not it is empty. If it is empty, a value of False is returned. If it has been completed, a true value is returned.
T=&SECR	If the value is true, update the Dear field with the contents of the Secr field (the first name).
Otherwise=&Trim(substr(contact,1,at(" ",contact)))+" "+Trim(Contact1->Lastname)	If the value is not true, update the Dear field with the text in the Contact field up to the first space (i.e. Mr, Mrs, Ms etc), leave a space, then add on the Last field. This assumes that the Contact field is completed formally – i.e. Dr Sam Smith.
Overwrite=1	Overwrite the contents of the field even if there is an existing entry.
INSTRUCTIONS FOR KEY1 (SALESPERSON)	
[Key1]	Field to be updated, in this case Key1
Lookup1=&IIF(contact1->Key5="Yes","T","F")	As this is Lookup1, this instruction will be performed first. This instructs GoldMine to examine the contents of Key5 (Protected account) and check to see whether "Yes" has been entered. If it has, then a True value is returned. If any other value has been entered, a false value is returned.
T=&Key1	If the value is True, update Key1 with itself – i.e. no change.
Overwrite=1	Overwrite the contents of the field even if there is an existing entry.
Lookup2=&SUBSTR(contact1->zip,1,3)	As this is Lookup2, this instruction will be performed if the instructions in Lookup1 result in Key 1 not being altered. This instructs GoldMine to examine the contents of the Postcode field (zip) and read the first three characters.
EC3=Claire Robinson	If the first three characters read

	"EC3", update the salesperson field (Key1) with the value "Claire Robinson"
EC2= Claire Robinson	If the first three characters read "EC2", update the salesperson field (Key1) with the value "Claire Robinson"
EC1= Claire Robinson	As above
EC4= Claire Robinson	As above etc.
Overwrite=1	Overwrite the contents of the field even if there is an existing entry.
Lookup3=&SUBSTR(contact1->zip,1,2)	As this is Lookup3, this instruction will be performed if the instructions in Lookup1 and Lookup 2 result in Key 1 not being altered. This instructs GoldMine to examine the contents of the Postcode field (zip) and read the first two characters.
N1=Richard Young	If the first two characters read "EC2", update the salesperson field (Key1) with the value "Richard Young"
SW=Richard Young	As above etc.
Otherwise=Unassigned	If a match is not found, enter "Unassigned" into the field.
Overwrite=1	Overwrite the contents of the field even if there is an existing entry.

3. OnNewRun

This section of the LOOKUP.INI will automatically run an external application on the creation of any new record e.g. when you add a new contact record. You can identify a specific database record e.g. Contact1, Contact2, ContSupp, OpMgr, etc. and additionally specify record types within the database e.g. ContSupp Details, Calendar appointments, etc.

To specify the database on creation, simply enter the database name = to the external application. To specify a record type (RECTYPE) within the database simply postfix the database name with -RECTYPE, e.g. ContSupp-P or Cal-A.

SECTION	DESCRIPTION
[OnNewRun]	Your applications can be executed on creation of records
Contact1=C:\Newrec.exe	When a Contact1 record is created execute Newrec.exe
ContSupp-P=C:\Detail.exe	When a Detail (previously known as Profiles) record is created execute Detail.exe
Otherwise=C:\ANYAPP.EXE	When creating any new record that is not specified

	above, run the external program ANYAPP.EXE. When this program is executed it is suffixed with the File + RECTYPE i.e. MYAPP.EXE CAL-A if a Calendar appointment was scheduled.
AppendRecNo=1	Appends the record number to the executable e.g. MYAPP.EXE 123
DisableFromAP=1	If an automated process creates the record then do **NOT** run the program.

4. OnEditRun

The OnEditRun section works in the same way as the OnNewRun, however, this section is only concerned with updates to records.

SECTION	DESCRIPTION
[OnEditRun]	Whenever a record is edited the given program will be run
Contact1=C:\UpdateC1.exe	When a Contact1 record is created execute UpdateC1.EXE
ContSupp-P=C:\UpdateD.exe	When a Detail record is created execute UpdateD.EXE

5. CalClrCode

This section will automatically allocate a default colour by specific activity types or specific activity codes within an activity type.

SECTION	DESCRIPTION
[CalClrCode]	Colour codes can now be dynamically allocated
S-HOT = 9	Colour set to red for forecasted sales with activity codes of HOT
A = 4	All appointments will have the colour default to bright green
C = 7	All calls will have a default colour of white
Otherwise = 12	Default to blue

The table below details the code to colours for the [CalClrCode] section.

CODE	COLOUR	CODE	COLOUR
0	BRBLUE	8	GRAY
1	BRPURPLE	9	RED
2	BRRED	10	GREEN
3	BRCYAN	11	YELLOW
4	BRGREEN	12	BLUE
5	BRYELLOW	13	PURPLE
6	CYAN	14	DKGRAY
7	WHITE	15	BLACK