

Quick Guide to Installation and Usage



GoldMine® Link to ACCPAC® Source Products

Link versions:

This Link is available for both the Pro and Vision Point Series. The Pro Series versions are essentially the same program, just compiled differently to match the ACCPAC Series: **LINK5p5.exe** for Pro 5, and **LINK5p6.exe** for Pro 6, etc. The Vision Point program is compiled only in VFP 6 and is called **LINK5vp.exe**.

INSTALLATION:

1) Locate the GoldMine program directory. Example: C:\Program Files\GoldMine. Copy the file LINK5xx.EXE into this directory.

2) In this GoldMine directory, find <username>.ini (example: DWIGHT.INI) make a copy of it for reference purposes (example: DWIGHT.OLD). With a text editor, edit <username>.ini and look for "[FileMenu]" if not found, add the [FileMenu] heading. Under this heading, enter:

Opt1=ACCPAC,,C:\Program Files\GoldMine\Link5xx.exe (Use your correct path).

If you already have an Opt1 entry, use Opt2 or the next available Menu option number. This step will add a new menu option on the GoldMine Files menu.

3) Enter GoldMine (restart if already running). Choose File and click on the new "ACCPAC" menu selection.

4) Setup Screen:

The first time the program is run, the Setup Screen is displayed. Simply follow the steps outlined on the screen. #1) Trial or Live... The Trial is already checked. If you purchased the "live" program you will be given an Install Code which removes the trial limitations. #2) Locate the ACCPAC Sysdata.dbf file. You may enter the full path directly, or point to the directory. We use this file to determine the location of your other company's files and directories. #3) Double Click on the Company you want linked. Only companies with AR installed are available for selection. #4) Select/Deselect... a) Use 10 User Defined Fields in the Fields 'Tab' area? 5) Click on "Save" and you are finished with the setup.

You may reenter this Setup Screen anytime, by selecting Help|Setup from the Menu.

SETTING PERMISSIONS AND OPTIONS:

There are many permissions and options available with the Link. These "switches" are set in GoldMine's <username>.ini file for individual settings or in the gm.ini file for global settings. A listing of these "switches" are given in the Appendix of the Documentation. Be sure to read the documentation for further information.

Early Version of the ACCPAC Source Programs:

This program was written in Visual FoxPro which is the language of the Pro 5.0, Pro 6.0 and Visual 10 series. If you are running an earlier version of ACCPAC then these, you will need the necessary DLL's installed on your computer. These DLL's are available at no charge from Microsoft. You can find them easily from the Strong-Software web site <<http://www.strong-software.com>>. Unzip these files and copy into a directory that's in your path "x:\windows\system" is an example of a good place for Windows 95/98.

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USAGE:

1. Start GoldMine
2. Create new Contact File (to experiment with) : Click on File | Open File | New. Enter Name "TEST".
3. Use new "TEST" Contact File: Click on File | Open File, select TEST.
4. Start the **Link**: Click on File | ACCPAC. See Misc. Note #3 for putting a "Launch" Icon on Tool Bar.

Add Customer to GoldMine

5. Run Update: Choose Update Contact File .
6. You will get message: "ACCPAC record is not in GoldMine" It will show the Customer Number and prompt to add record. Click on "Yes".
7. The next ACCPAC customer will also not be found, add this and the next 2 or three records. (After the initial familiarization of the Link, you can set a switch to add all customers without the prompts.)
8. Exit the **Link** menu.

Examine Imported Data

9. Select one of the newly added Customer records in GoldMine.
10. Note the Company, Contact, Address, Phone, etc. are from the ACCPAC customer file.
11. Note the "Asst" Field has today's date in it, showing the date of last update. See documentation for re-labeling this field to "UpDate".
12. Note the 3rd field in the 4th Quadrant (Key3 field) has the Customer number in it. You may have to rename the label manually for this field
13. Note the Fields Tab area has data in it representing 10 fields from the ACCPAC Customer file (an additional nine fields can also be mapped to this or the main screen area).

See Differences Between ACCPAC And Goldmine Data

14. Change last digit of phone number
15. Move off of this record , then come back to it.. or Double Click on Link screen to force update.
16. Note the message on your Link screen says the Record Has Changed, click on this button.
17. Screen shows Fields (in Red) which are different. You have a choice of which way to update.

View Live Data

18. Choose View from the Customer menu item. Note that data in this live view is identical to the fields on your GoldMine Fields Tab area (because accessing the Link, automatically updates GoldMine).
19. Choose View | Invoices. Note the Header information grid and the matching Detail items.
20. Choose View | Sales Orders. Note the Header information grid and the matching Detail items.

Place a (simulated) Order

21. Choose **B**id from the Menu. Note the Header Page and make changes to Discount and ShipTo.
22. Click on the Detail page and select an item, click on Zoom for larger viewing of items.
23. Press OK to enter items into the Detail Grid. Press Cancel to cancel order if this is live company data.

Add New Customer to ACCPAC

24. In GoldMine, add new Contact record. Enter "Test Company, Inc." as Company name, put in dummy contact, address, and phone number. In the Key3 field (Customer Number) enter "TCI"
25. From the menu, choose Customer | Add.
26. Note that Name, Address, Phone Number and other basic customer information has been brought over from GoldMine. Other data such as taxable, discount, terms, etc. can be brought in from GoldMine's <username>.ini file.
27. Enter the Alpha portion of the customer number and click on "Get Next Number" to make this a unique customer number.
28. Click on Save. You'll get a message confirming that the GoldMine contact is now a record in ACCPAC

Please feel free to experiment further with your trial company using our full documentation.