



Genesis

Genesis dramatically improves data entry speed and accuracy in Goldmine. It achieves this feat by employing SquareGiraffe's unique FormDesigner technology, which allows you to design screens with data entry controls that are much more efficient than the standard Goldmine controls. It also enables superior record typing compared to GoldMine's Record Typing implementation.

Immediate benefits include increased data entry speeds, and a significant reduction in errors. This is made possible due to the validation built into all controls in Genesis.

A further benefit is that your training needs to new recruits will reduce, since data entry screens can be designed to suit a particular department or marketing campaign.

Revolutionising data entry in GoldMine

“Design superior data entry screens to match your business needs”

“Dynamic Record Typing: Load custom designed screens based on the value in a pre-defined field”

“Just the paste expert and the checkbox control make Genesis a must have product”

Data entry controls in Genesis include a tabbed notebook, lookup edit controls, date controls, checkbox controls, group boxes, panels and labels. Use these controls to design a form for a specific purpose or department, linking to fields in CONTACT1 or CONTACT2.

System requirements: All SquareGiraffe programs make use of an efficient library that is common to all programs. The library files need 7MB hard disk space, and the Genesis program needs 430KB.

Genesis is designed for Windows 95 upwards, and will run on the specification provided by Microsoft for each operating system.

Genesis is able to integrate with Goldmine versions 4, 5, 5.5, 5.7, 6.0, 6.5, 6.7 and 7.

To purchase please visit the AddOnStore for GoldMine at www.goldmineaddons.com where you can find more information about this product and many more addons for GoldMine. Or call 800 806-5288.

Feature	Explanation and benefits of Genesis
<p>Record typing</p>	<p>Through the FormDesigner technology, dynamically load different screen layouts based on the values of a particular field, e.g. KEY1.</p> <p>This functionality is now available for GoldMine versions prior to 6.5, right back to GoldMine 4</p> <p>Unlike GoldMine's implementation of Record Typing, the FormDesigner Record Typing enables you to design and dynamically load a <i>complete</i> screen with all the relevant CONTACT1 and CONTACT2 fields – thereby greatly enhancing user acceptance and data entry efficiency</p> <p>All designed forms are available from an easily accessible drop-down box, which is always visible</p> <p>Flexible licencing options for the FormDesigner, starting with a single form licence included in Genesis. This can be upgraded to the Small Business FormDesigner licence for up to 5 forms, and a site licence for unlimited forms</p>
<p>Paste expert</p>	<p>An extremely user friendly Paste Expert makes entering data via the Windows clipboard a painless operation. It involves a two step operation of copying the information to the clipboard from whatever source (websites, your own internal database, etc). The paste expert reformats the data from the clipboard, so now you are ready to paste! Simply click on the field in Genesis where you wish the topmost line from the Paste Expert to be pasted</p> <p>The Paste Expert can be used in New or Edit mode</p> <p>See a "flash" demo of this fantastic feature on our website (www.squaregiraffe.co.uk)</p>
<p>Built-in, powerful designer</p>	<p>The program has two modes: A "run" mode which is the normal mode, and simply means that the program is ready to accept data entry input. The other mode is design mode, and is accessible to users with master rights. It allows you to design screens containing the Goldmine fields that are important to you</p> <p>In run mode, users will perceive the screen layout as part of your business, since it can mimic the layouts of other programs, paper data entry forms etc., already used in your business</p> <p>In design mode, you can add various controls onto the form and link it up to the appropriate field from CONTACT1 or CONTACT2 You have (almost!) complete control over the layout of the form</p> <p>Controls include a lookup control that mimics Goldmine's lookups, date controls, and even a checkbox control for logical, yes/no values. Further design aids like a tabbed notebook and panels are included to give you the capability to design any form of your choosing</p>
<p>Edit existing records and create new records</p>	<p>Edit mode is the normal mode. Genesis is refreshed as soon as it is activated, so that it always shows the same details as the current Goldmine record</p> <p>Edit mode is invaluable as a tool for validating existing records</p> <p>It is also a great way to view all the pertinent information of your business from CONTACT1 and CONTACT2 on one screen, in a layout that you are familiar with. This includes data held in user defined fields in CONTACT2</p> <p>New record mode clears all the fields, ready for new record data entry making it an extremely efficient method of entering large numbers of new records</p>

Feature	Explanation and benefits of Genesis
Built-in mandatory field checking	Every editable control can be configured to either show a warning if it is left blank, or prevent the record from being saved if it is blank
Duplicate checking	<p>When in new record mode, Genesis checks for duplicate contacts as you type</p> <p>Unlike Goldmine, Genesis finds matches anywhere in the phrase, so you can quickly check if a record is already on the database by typing a few characters from any part of the contact name, company, telephone number or email address</p>
Active Sync with Goldmine	<p>When you move from contact to contact in Goldmine, and subsequently switch to Genesis, the currently active Goldmine contact is loaded into Genesis</p> <p>You can even scroll the Goldmine contact from within Genesis</p>
Calendar and history events	<p>You can create multiple calendar and history events and save it all at once</p> <p>For example, you can create a new contact, schedule three calendar events and one history event, all in one operation</p> <p>You can save frequently used events as templates, which means that it can be loaded with a single click</p>
Save confirmation option	<p>When you save a record, the save confirmation dialog shows you a summary of what is about to happen. This is useful for novice users, who may be unsure of what they are about to do</p> <p>This option can be switched off, so as not to impede the speed of data entry of more experienced users</p> <p>There is an "Info" button that gives you instant access to the save confirmation dialog</p>
Superfast data entry	<p>The cursor jumps to the next control when you press ENTER - unlike Goldmine that goes out of edit mode</p> <p>You can set the tab-order of controls in the designer, by simply Ctrl-click-selecting the controls in the order that you want the cursor to move</p> <p>You can change the character case in the designer, for example to automatically convert the postcode to uppercase</p> <p>There are shortcut keys for common operations like Ctrl-S to save, Ctrl-G to go to Goldmine</p>
Standard lookup controls	<p>The lookup controls use the same lookup values as defined in Goldmine</p> <p>Genesis has two ways of performing lookups. It can be done in the traditional way by clicking the lookup button, but in addition, it has Quicken style matching-as-you-type</p>
Tight integration with GoldSearch	<p>The keyboard shortcut Ctrl-F6 switches between Genesis and GoldSearch, making it easy to find records, and edit it in your favourite editor</p> <p>Genesis and GoldSearch are tightly integrated, so that you always have the same information on the screen in Genesis, GoldSearch and Goldmine</p>