



MasterMine for GoldMine Installation and Getting Started

Short Version:

- Install to workstation or terminal server
- Download installer from www.mastermine.net
- Turn off all Excel and log into GoldMine as intended MasterMine user
- Launch MM installer and answer prompts (usually defaults, plus SQL login info)
- When finished, re-log into GoldMine and see MasterMine in GoldMine taskbar

System Requirements:

1. Microsoft Excel (Office 2007 or higher, with all service packs) must be installed on the workstation or terminal server prior to installing MasterMine.
2. MasterMine for QuoteWerks works with Windows XP or higher, including Windows 10.

Detailed Installation Instructions:

MasterMine typically installs to your local workstation (the same machine as your QuoteWerks node and MSOffice, to which it supplies an add-in). See below for terminal services installations.

Install Preparation

1. You will need SQL credentials to complete the installation. For at least one installation (to place user-defined functions onto the SQL server) your credentials must have "write" access to the SQL server. Subsequent workstation installations may use read-only SQL credentials.
2. Make sure you have all Office Service Packs installed for the version you are running. You may want to launch Excel on the local machine to be sure there are no Excel issues that need resolution BEFORE attempting to install MasterMine. Make sure Excel's macro security is not set to the highest level ("Disable All Macros").
3. **Exit Excel** before beginning the installation.
4. Download MasterMine from the website if you have not already: www.mastermine.net
Save the downloaded file to your workstation.

5. Log into GoldMine as a user who will use MasterMine.

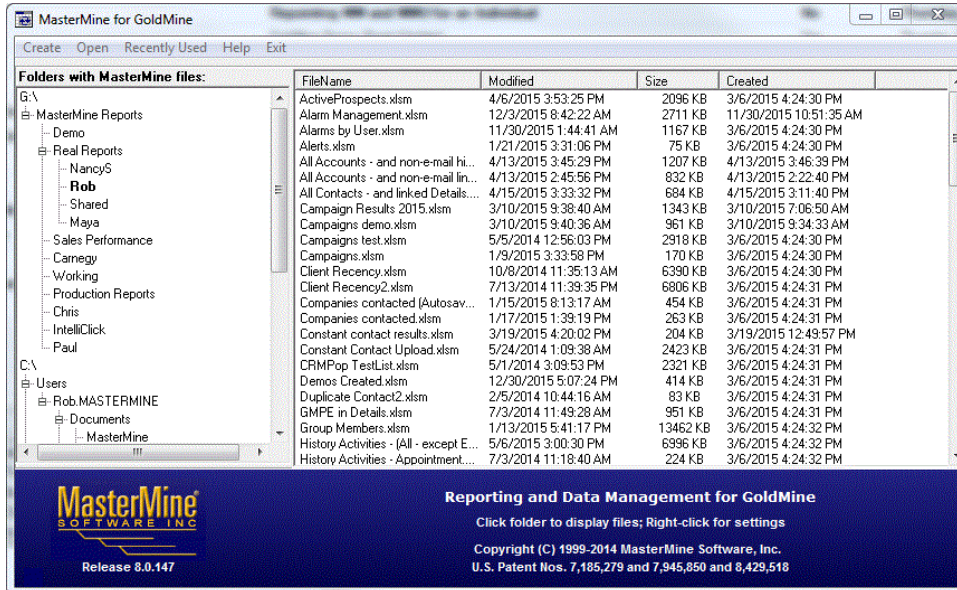
Basic Install:

1. Run the MasterMine for GoldMine installer with Windows Admin privileges (right click the downloaded installer and choose "Run as Administrator").
2. Install as you would any windows 32-bit application to the Program Files (on 32-bit Windows) or (x86) Program Files folder (on 64-bit Windows).
3. When installation is finished, re-log into GoldMine and look for MasterMine is on the taskbar in GoldMine. Enable taskbars by right-clicking in the open area to the right of the menu bars in GoldMine and checking "Taskbar". You should now see a "MasterMine" taskbar group with "Launch MasterMine as the first item within it.

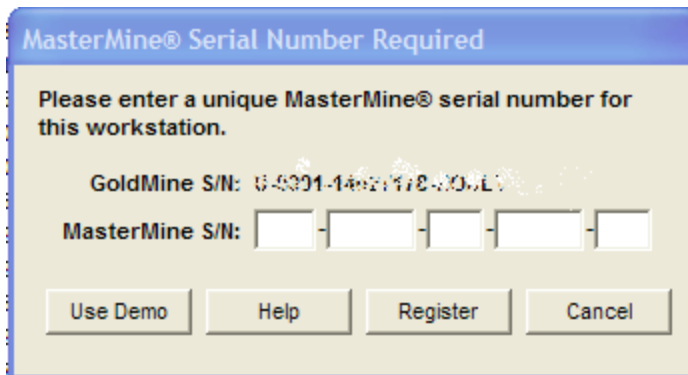
For GoldMine 4.x thru 7.x, which may not have taskbars, look for MasterMine on the “View” menu.

Licensing: Create or Share License

Launch MasterMine from the taskbar. A “Launch” dialog will come up. If the dialog displays any existing reports, you may open one. Otherwise, click “Create” to create a new report.



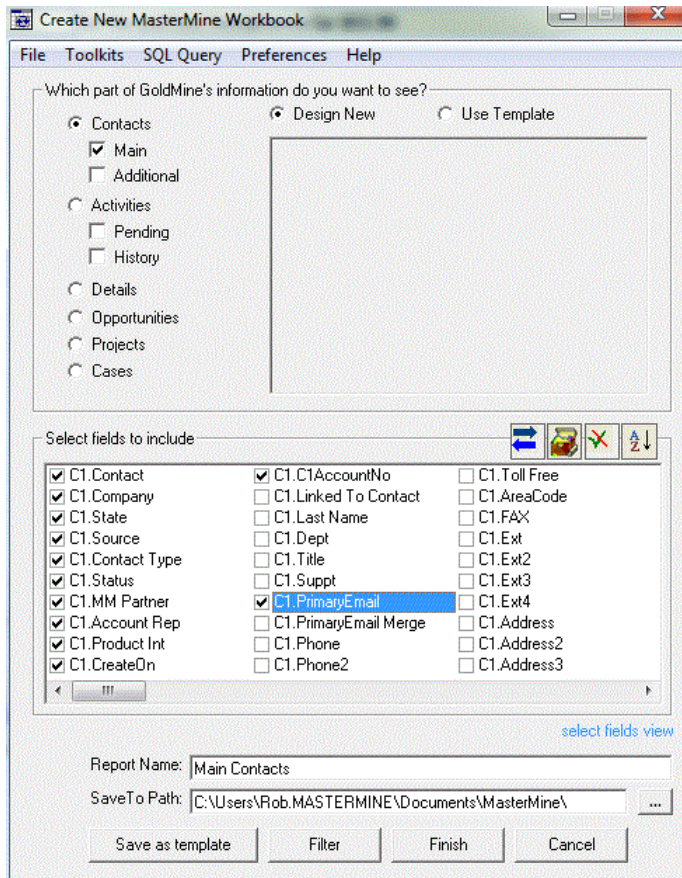
This will bring up a licensing screen like the following. Enter a unique license number which will be assigned to the currently logged-in GoldMine user.



The license number BEGINS with the number of authorized seats covered by the license, and ENDS with the sequence number of the specific licensee. For example, if the license reads “3-12345-67-98765-01”, this license covers 3 users, and will be assigned to users in sequence, ending in 01, 02, and 03.

If user MARY is licensing MasterMine and enters this license number, but JOE has already used it, she will be notified and may go on to try the next number in sequence, namely “3-12345-67-98765-02”. Once these licenses are all assigned (e.g. when the sequence number

To verify that the SQL functions were properly installed, click “C1.PrimaryEmail” in the Create dialog, as follows:



If no error comes up, SQL functions are present. If an error does come up, you can re-install the functions WITHOUT fully reinstalling by running MMconfig.exe in the MasterMine application folder. Right-click it and select “Run as Administrator” for best results.

Create a test report by simply hitting “Finish” without selecting any additional parameters. The resulting report will be an overview of the accounts in your database.

See the MasterMine user manual (under “Help” in the create dialog, or in Excel after opening a MasterMine workbook, under “User Manual” on the MasterMine ribbon/toolbar).

Licensing MMUpdater (or Master License)

You must license MMUpdater from within Excel, with a MasterMine workbook open. To license, drill down (double-click any number in the Data area of a pivot table) to create a drill down sheet.

From the drill down sheet select MasterMine Drilldown from the menu options in Excel. From there click the MMUpdater icon in the ribbon above. When prompted to use demo or register, click on register and enter in your MMUpdater license number in the box provided and click ok. A congratulations box will appear, click “OK” and the product is ready to use.



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Further help with any installation issues can be found in our online knowledgebase at www.mastermine.net under "Support". Give us a call toll-free at 877-877-7212 if you have taken the steps above and your install does not look like this.



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Special Installations:

Adding MasterMine to other users' menus without installing again:

Normally, MasterMine is installed on each users' workstation, and added to each user's menu at that time. To accomplish ONLY the addition of MasterMine items to the menu of a user, do the following:

1. Launch GoldMine under the name of the new MasterMine user
2. In the MasterMine application folder, double-click on "MMconfig.bat" and indicate preferred setup if requested.
3. Re-log into GoldMine as the new user

Terminal Services:

Install MasterMine on your terminal server as you would any other application. Make sure at install time that the installing user has administrative rights to the GoldMine application folder and its subsidiary folders. Follow the instructions above to add menu items for each user without re-installing MasterMine multiple times.

Note that MasterMine has only one MMINI.xls file, which holds user preferences, per workstation. In a terminal services environment, all users will therefore have the same preferences set.

SQL GoldMine with multiple databases

You may wish to use MasterMine with more than one contact set/database combination. To simplify logging into these different SQL databases (e.g. so as not to be asked each time for a SQL username and password), MasterMine allows for storage of multiple sets of SQL parameters in its MMINI.xls file.

Locate this file in the "Support" folder within the MasterMine application folder. Open it using Excel, and go to the GMSQL tab. On rows 2, 3, etc. enter parameters for each different SQL database, then save the MMINI.xls. Now when you launch MasterMine, it will step through these parameter sets and try each one before resorting to a request to user for SQL servername, database, username, and password.

Note that SQL passwords are stored in encrypted form. However, you may enter passwords in normal form for these purposes, and MasterMine will immediately encrypt any password found in the MMINI.xls when it makes use of the database in question.

Updating Existing MasterMine Installations

Install to the exact same location as the existing application, in order to prevent mismatching with the existing menu calls to the MasterMine application. If you install to a different location, you will need to open users' username.ini files (in the GoldMine application folder) and update paths to the MasterMine.exe file.

Launching options:

MasterMine can be launched directly to "create" or "open" mode from menus or from the GoldMine taskbar (v5.7 or higher) by appending a "/C" or "/O" respectively in the command line. Individual MasterMine reports can be launched by using "/!;x:\path\reportname.xls" where the switch is a capital "eye"- semicolon, followed by the path and name of the report you wish to launch.

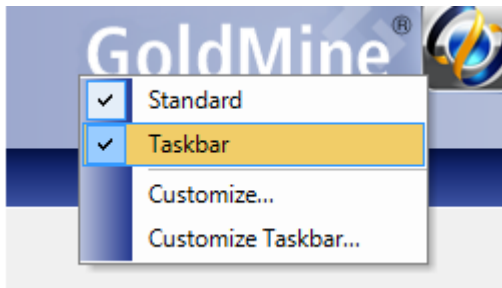
More Documentation:

User Manual – see the MasterMine user manual under “Help” in the report creation dialog
Online – See our online knowledgebase under “Support” at www.mastermine.net

Manually Add MasterMine to GoldMine Taskbar

If the software is already installed on the workstation or terminal server for other users, and you simply want to make it available to additional users without reinstalling MasterMine:

1. Log into GoldMine as the intended user.
2. Make sure taskbars are enabled (Right-click in upper-right purple area and check on "taskbar" to enable)



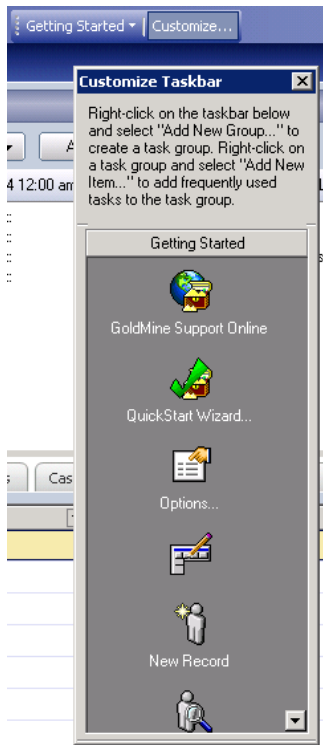
3. a) **Automatic option:**

- As admin user in Windows, navigate to and double-click on c:\program files (x86)\MasterMine\MMConfig.exe
- Follow prompts and take defaults.

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- Log out of GoldMine and back in. MasterMine should be on the taskbar.

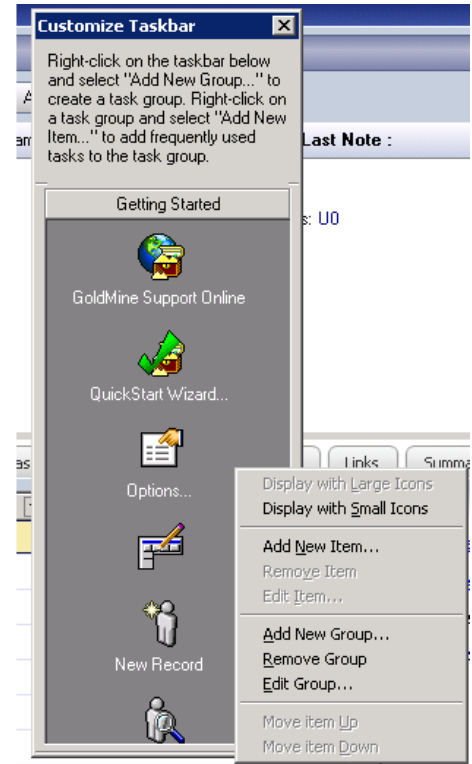
3. b) Manual option:



- Click "Customize" on the GoldMine taskbar

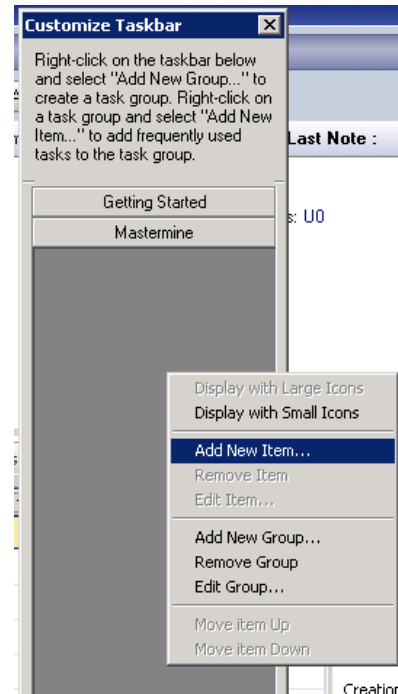
- Right-click in the gray lower box of the Customize Taskbar dialog and select "Add New Group"

- Name the group "MasterMine" and click "OK"

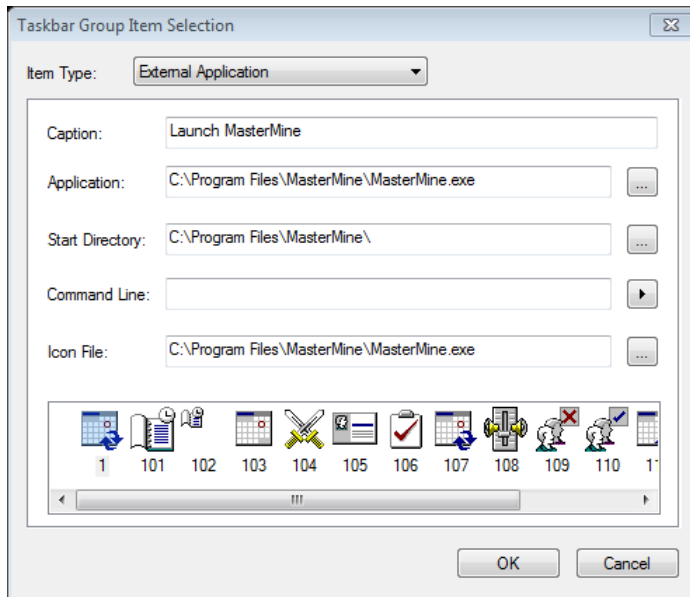


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- Right-click below the "MasterMine" group bar and select "New Item"



- For Item Type, select "External Application"

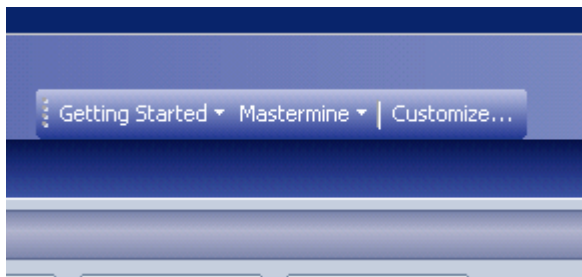


- Caption: Launch MasterMine

- Application: Click the "..." button to the right and navigate to "MasterMine.exe", most likely under either C:\Program Files (x86)\MasterMine or C:\Program Files\MasterMine and double-click on it to select it.

- Click OK

- Click the top right "x" on the customize Taskbar to close it.



You should now see a "MasterMine" taskbar in GoldMine, with "Launch MasterMine" as an option when you mouse over it.