

Using GoldBox for Web Import

GoldMine has long offered Web Import capability that involves one or more web forms; ASP or Perl scripts to convert the form data to specifically-formatted E-mails; and the activation of GoldMine's internal programming to accept and process the E-mail sent by the scripts. GoldMine has enhanced these capabilities over the years; today some sophisticated requirements can be met.

So you may wonder why anyone would choose to forego the use of GoldMine's programming, and use GoldBox for web imports instead. GoldBox's overall approach (and my own) have always been that—if GoldMine has a capability and does it well—it's best not to develop or promote GoldBox as an alternative for that particular capability.

But in the case of web imports, clients have come to me requesting an alternative to GoldMine's offering. There have been a variety of reasons cited; but probably the most important involved capabilities that exist with GoldBox Imports and that are lacking with GoldMine's Web Import.

For example, Trevor called me recently. In his words: *"We use a web form to allow customers to request their choice of catalog and how many they would like. In the past, our web forms were setup to send an email to a mailbox of ours, where someone would have to then check and take the information from the email and manually enter it into GoldMine, also adding a track so that our AP could send them a thank you email, print an address label to go on the catalogs, set up follow up calls, etc... This could at times consume several hours a day."*

At the time he contacted me, Trevor was new to AccuCut, and new to GoldMine. Obviously, GoldMine's Web Import

programming wasn't properly set up; but rather than try to repair it, Trevor wanted to replace it with something simpler, if possible. Also, it's vitally important to be able to **accurately** match up web entries to their corresponding GoldMine records. Because of other work I'd done for AccuCut, Trevor knew that GoldBox was capable of making such matches exceptionally well.

But, given that GoldBox has no specially-designed Web Import feature, **how is web form data processed?**

Trevor: *"We now have changed our web form to output to an ASCII text file, creating the file and adding the headers if the file does not exist; or appending to it if it's already there."*

*"Because our web server is not on our network, I have to periodically ftp the file to our local GoldBox directory. I then simply delete the file from the server and let the web form recreate the text file. This is the only manual step and takes less than a minute to do. I typically do this once a day." [Note that if the web server is available to GoldBox via the network, there are **NO** manual steps at all.]*

"Then at night, the Q-file runs, importing the information from the text file into Goldmine and automatically adding the track so that our AP will pick it up."

"Another nice thing about this is that it also gives us an easy way of quality checking because once GoldBox grabs the text file, it then archives it to another folder, so if we wish to go back and look at the files and match them up to Goldmine to assure customers are getting their catalogs, we can."

More details and advantages: with GoldBox, you can choose from **3 completely different kinds of record matching**, for the best possible

accuracy in finding and updating existing GoldMine records (GoldMine offers only one).

Custom Matching is most popular, because it offers GoldBox's two "Smooth" functions that act as fully-configurable (table-based) "fuzzy" matching options; along with a custom index that can be up to 100 characters long. Also available are **SQL Query Matching** and **matching via GoldMine's standard Indexes**.

Also, GoldBox can process Source data more intensely (including the use of **multiple passes, each with a different matching option**, if needed). And, GoldBox offers **field-level update options** not available with GoldMine. These enable custom, conditional processing of each field, for matched records.

Other GoldBox features include the **Plug-In Tab record options** that can be processed differently for new records vs. existing GoldMine records. Also, because GoldBox uses a dBase file as its source, it's possible to **write back the Accountno** of each GoldMine record (new or existing) to the Source table. This not only provides an unparalleled audit trail (the archiving that Trevor mentioned), but also assists when multiple passes are required, because previously-matched records can be filtered out based on Accountno.

Once in place, **each Source file is processed by GoldBox, using a Q-file script**. If multiple web forms are involved, multiple Q-files are used (all controlled by a "master Q-file"). GoldBox has all the programming commands necessary to convert each ASCII file to dBase; to match each dBase file with the proper GoldBox Import/Update Setup(s); and to rename and archive each ASCII and dBase Source file once processing is completed.

The **actual automation of the web import is accomplished via Windows Task Scheduler**, which runs the master Q-file. The web form data can be processed nightly; or, if necessary, multiple times during the work day.

So there you have it. Quite simple, actually. If you are happy with your current application of GoldMine's Web Import feature, continue with it. But if you want the ultimate in accurate record matching and the additional options that are available with GoldBox, now you know you can get it for web import!

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