

I'm new to Goldmine automation.

I'm trying to figure out in Automated Processes how I can generate an appointment confirmation letter that will automatically assemble and print immediately after I schedule an Appointment without having to do anything more than clicking on the Schedule Button. I'm thinking the letter should have the date, time and office location of the appointment.

Any help would be appreciated!

Thanks.

Neil

Neil, one way to achieve your desired result would be to create a single automated process that performs both the scheduling and the printing. Then create a macro to launch the automated process and place the macro's button in the toolbar along the top of GoldMine. A user would simply make the appropriate contact record the "current contact" and then click the macro button. The letter would require a Word mail merge template.

If some appointments are at the contact's premises and others are at yours, you'll need two automated processes, two macro buttons and two mail merge templates, one for appointments at the contact's premises and the other at yours.

If you are proficient in GoldMine, this should all be fairly straight-forward. But if you are new to automated processes, macros and/or mail merge, a GoldMine Partner can help.

Best of luck!

In the old days Barry, I might have agreed with you. However, I have not found Keyboard Macros in GoldMine Premium to maintain their reliability. If you can record one at all, it may only function properly for a couple of runs.

On the other hand, Automated Processes is the correct way to handle this issue. Have the Observer Process watch for a New Scheduled Activity with a specific Activity Code, and then Print Form. You must set up the HTML Form similar to my Session Approval Form when individuals request a meeting from me.

Don't rely on the Macros anymore.

Thanks DJ.

So, if I understand this correctly, if the "New Scheduled Activity" is an appointment (APT) and the specific "Activity Code" is, for example, IC//Initial Consult, the Observer Process would watch for this and, if found, then print the letter (Print Form)?

If I want to pull in the date and time from the scheduled activity into the appointment confirmation letter, what Fields would be inserted into the Goldmine template for the date and time for that particular scheduled activity?

Thanks.

Neil

That sound correct. I have a Template that I use, and here is the HTML Code that is specific to my company. You should be able to mine the correct information from this code.

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
<title>Untitled Document</title>
</head>

<body bgcolor="#D3DCE6">
<table width="800" border="1">
<tr>
<td width="81"><font face="Segoe UI" size="2" color="#414EAD"><strong></strong></font></td>
<td width="515"><strong><font face="Segoe UI" size="5"
color="#414EAD"> Computerese</font><br />
<font face="Segoe UI" size="2" color="#602085">We translate
computerese into English</font></strong></td>
<td width="182"><font face="Segoe UI" size="2" color="#000000"><strong>DJ Hunt<br />
150 Pratt Road<br />
Fitchburg, MA 01420-4142</strong><br />
<br />
<strong>(978)342-3333</strong><br />
<strong><a href="mailto:DJ@DJHunt.US">DJ@DJHunt.US</a></strong><br />
<strong>DJ.Hunt</strong></font></td>
</tr>
</table>
<br />
<br />
<p><font color="#000080" size="3" face="Calibri">You have been
scheduled for a session with: </font> <font face="Calibri" color="#800080" size="3"><b>
<lt;&lt;Cal-&gt;UserID&gt;&gt;<br />
<br />
</b></font><font color="#000080" size="3" face="Calibri">I will be remotely connecting to
you using: </font><font size="3" face="Calibri"><b><font color="#800080"><a
href="http://www.splashtop.com/sos-
download">SOS.Splashtop.com</a></font></b></font><font face="Calibri" color="#800080"
size="3"><b><br />
<br />
</b></font> <font face="Calibri" color="#000080" size="3">If
necessary he will be calling you using: </font><font size="3" face="Calibri"><b> <font
```

color="#800080"><<&Phone1>></p>

<p> </p><table border="0" width="414" id="table1">

<tr>

<td align="right" width="125"> Meeting

Date:</td>

<td align="right" colspan="2"><p align="left"> <<wdate(Cal->OnDate, 3)>></p></td>

</tr>

<tr>

<td height="5" colspan="3" align="right"> </td>

</tr>

<tr>

<td align="right" width="125"> Meeting Time:</td>

<td colspan="2" align="right"> </td>

</tr>

<tr>

<td align="right" colspan="2">Eastern:</td>

<td width="275"> <<iif(left(Cal->OnTime, 2)>"12", alltrim(str(val(left(Cal->OnTime, 2))-12))+right(alltrim(Cal->OnTime, 3)+"pm", alltrim(Cal->OnTime)+"am"))>></td>

</tr>

<tr>

<td align="right" colspan="2">Central:</td>

<td width="275"> <<iif(left(Cal->OnTime, 2)>"13", alltrim(str(val(left(Cal->OnTime, 2))-13))+right(alltrim(Cal->OnTime, 3)+"pm", IIF(padl(alltrim(str(val(left(Cal->OnTime, 2))-1)), 2, [0])=[12], padl(alltrim(str(val(left(Cal->OnTime, 2))-1)), 2, [0])+right(alltrim(Cal->OnTime, 3)+"pm", padl(alltrim(str(val(left(Cal->OnTime, 2))-1)), 2, [0])+right(alltrim(Cal->OnTime, 3)+"am"))>></td>

</tr>

<tr>

<td align="right" colspan="2">Mountain:</td>

<td width="275"> <<iif(left(Cal->OnTime, 2)>"14", alltrim(str(val(left(Cal-

>OnTime, 2))-14))+right(alltrim(Cal->OnTime), 3)+"pm";
IIF(padl(alltrim(str(val(left(Cal->OnTime, 2))-2)), 2, [0])=[12], padl(alltrim(str(val(left(Cal->OnTime, 2))-2)), 2, [0])+right(alltrim(Cal->OnTime), 3)+"pm";
padl(alltrim(str(val(left(Cal->OnTime, 2))-2)), 2, [0])+right(alltrim(Cal->OnTime),
3)+"am"))>></td>

</tr>

<tr>

<td align="right" colspan="2">
Pacific:</td>

<td width="275">
<<iif(left(Cal->OnTime, 2)>"15"; alltrim(str(val(left(Cal->OnTime, 2))-15))+right(alltrim(Cal->OnTime), 3)+"pm";
IIF(padl(alltrim(str(val(left(Cal->OnTime, 2))-3)), 2, [0])=[12], padl(alltrim(str(val(left(Cal->OnTime, 2))-3)), 2, [0])+right(alltrim(Cal->OnTime), 3)+"pm";
padl(alltrim(str(val(left(Cal->OnTime, 2))-3)), 2, [0])+right(alltrim(Cal->OnTime),
3)+"am"))>></td>

</tr>

<tr>

<td height="21" colspan="3" align="right"> <font
face="Calibri"> </td>

</tr>

<tr>

<td align="right"> Not to
Exceed:</td>

<td align="right" colspan="2"><p align="left"><font color="#800080" size="3"
face="Calibri"> <font
color="#800080"><<ltrim(str(int(Cal->Duration/60)))+[
hr]+ltrim(str((Cal->Duration/60-int(Cal->Duration/60))*60))+[
min]>></p></td>

</tr>

</table>

<p>

Reference: <font
color="#800080"><<Cal->Ref>>

<<Cal->Notes>><font color="#000066" size="3"
face="Calibri"><<Cursor>>

--====

Your GoldMine Support Expert ===-

<font

face="Calibri" color="#414EAD" size="3">

DJ Hunt is one of the top 1% most endorsed on @LinkedIn in United States for CRM.

DJ Hunt's Calendar & Support<a

href="http://www.DJHunt.US/DWSite/Docs/GoldMine/GoldMine_Support_Home.html"

style="text-decoration: none">

<font

color="#414EAD">GoldMine Premium - The Definitive

Guide</p>

</body>

</html>

Thank you DJ.

This document was generated from the following discussion: [Automated Letter Confirming Appointment Just Set](#)