

# Contact Management Systems (916) 921-6200

## *GoldMine Beginning/Intermediate Training Topics*

We have combined the Beginning GoldMine class with the Intermediate GoldMine class that GoldMine offers. We felt that the beginning class focused too much on elementary computer aspects such as learning the keyboard and how to use the mouse, rather than diving directly into the program. The beginning class also left the user with just a glance at some of the features and functions that users use the most and want to learn.

The Beginning/Intermediate class will give your users the tools necessary to start using GoldMine effectively. We cover topics such as entering in new records, scheduling and completing activities, viewing calendars, filters, mail merge, and reports. A few descriptions of the topics are available here.

The Beginning/Intermediate class is also an excellent class for users who have been using GoldMine, but have not been formally trained. We have had people that have been using GoldMine for nearly four years discover easier ways to do certain tasks or realize that they have been doing those tasks wrong.

### **Introduction**

Course Objectives

### **Getting Acquainted**

Launching GoldMine  
GoldMine's Look And Feel

### **Adding Records**

Creating A New Contact  
Lookup Windows  
Adding A Lookup Entry  
Editing A Lookup Entry  
The Zip Code Database  
The Tab Bar  
Duplicate Records

### **Finding Contacts**

Moving Around  
The Contact Listing  
Finding Contacts  
Text Search

### **Contact Maintenance**

Editing Contacts  
Additional Contacts  
Detail Records  
Finding Detail Records  
Adding A Note  
Searching Notes

### **Calendars**

The Calendar  
Resizing The Calendar  
Displaying Completed Activities  
Calendar Outline View  
The Activity List  
Before The Call  
The Phone Call  
Completing The Call

### **Scheduling**

Scheduling A Call  
Setting An Alarm  
Scheduling An Appointment  
Scheduling From The Calendar  
Completing An Appointment  
Scheduling A Forecasted Sale

### **Introduction to Reports**

Printing Reports  
Reports And Filters  
Report Sorts

### **GoldMine's Preferences**

Preferences  
The Personal Folder  
The Record Folder  
The Calendar Folder  
The Schedule Folder  
The Alarms Folder  
The Lookup Folder  
The Toolbar Folder  
The Pager Folder  
The Sync Folder  
The Misc Folder  
The Login Folder  
The Modem Folder  
The Internet Folder  
The Composing Folder  
The Retrieval Folder  
The Accounts Folder  
The E-Mail Center Folder  
The Advanced Folder

### **Introduction To Filters**

Using Filters  
Creating A Filter  
Creating A History Filter  
Record Tagging

### **E-Mail**

Adding An E-Mail Address  
The E-Mail Center  
Reading E-Mail  
Sending E-Mail  
Outlook E-mail  
Synchronizing with Outlook  
Synching with your Palm

### **The Organization Chart**

Using The Org Chart  
Managing Events  
Adding A New Section  
Replicating Data  
Activating & Releasing a Section  
Organization Chart Options

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## GoldMine Advanced / Admin Training Topics

### Editing Contacts

- Using Contact Files
- Referrals

### Advanced Filters

- Filter Expressions
- Creating A Complex Filter
- Editing A Filter
- Drill Down
- Filter Limits

### Groups

- Using Groups
- Adding A Contact
- Sorting A Group
- Using Filters To Add Members
- Creating A Group From A Filter
- Creating A Group From Activities
- Creating a Group From an SQL

### Correspondence

- Installing The Microsoft Word Link
- Making A Word Letter Template
- Merging To A Group
- Copy Contact Details

### Advanced E-Mail

- E-Mail Options
- E-Mail Rules
- E-Mail Templates
- Merging E-Mail

### Literature Fulfillment

- Scheduling A Literature Request
- Fulfilling A Literature Request
- Literature List Maintenance

### Scheduling

- Scheduling To-do Actions
- Sending A Phone Message
- Receiving A Phone Message
- Scheduling Recurring Activities
- Displaying Multiple Users
- Scheduling An Event
- The Pegboard
- Scheduling For Multiple Contacts
- Scheduling Meeting Requests

### Using Reports

- Creating A New Report
- Report Basics
- Adding Fields To The Detail Section
- Dressing Up Your Report
- Copying A Report

### Opportunity/Project Management

- Creating A New Opportunity
- Players And Tasks
- Creating An Opportunity

### Setting Up GoldMine Users

- Adding A New User
- Record Ownership And Curtaining
- Setting Access Rights
- User Groups
- Creating A User Template

### User Preferences

- Setting Preferences
- The Personal And Record Folders
- The Lookup And Toolbar Folders
- The Pager And Misc Folders
- The Login Folder
- The Calendar Folder
- The Schedule And Alarms Folders

### The Internet

- The Modem And Internet Folders
- The Composing And Retrieval

### Folders

- The Accounts Folder
- The E-mail Center & Advanced

### Folders

### Using The InfoCenter

- Navigating The InfoCenter
- Working With The InfoCenter
- Attaching A File
- Searching The InfoCenter
- InfoCenter Import/Export
- Record Alerts

### Synchronization

- Transferring Contacts
- Creating A Transfer Set
- Retrieving A Transfer Set
- Notebook Sync: On The Network
- Notebook Sync: On The Notebook
- Palm/Visor Synchronization
- Outlook Synchronization

### Customizing GoldMine

- Lookup Window Settings
- Expanded Detail Records
- Setting Up Detail Tabs & Field

### Labels

- Creating Custom Fields
- Defining A Screen
- Creating A Custom Screen

### Customizing Toolbars

- Creating A New Toolbar
- Working With Toolbar Icons
- Recording A Toolbar Macro
- Deleting A Toolbar Macro

### Automated Processes

- Automated Processes Explained
- Creating A Track
- Attaching Tracks To Contacts
- Executing A Track
- Scheduling An Activity
- Scheduling A Followup Call
- Adding A Branch
- Removing A Track
- Executing Your New Track

### Data Maintenance

- Indexing/Packing
- The Merge/Purge Wizard
- Merging Visible Records
- Global Replace
- Territory Realignment
- GoldMine System Logs
- Backup & Restore

### Importing & Exporting

- File Formats
- Exporting ASCII Delimited Files
- Exporting DBF Files
- Creating An Import Profile

### Telemarketing Scripts

- Branching Scripts
- Creating A Branching Script
- Running Your New Branching

### Script

### The License Manager

- GoldMine License Types
- A Licensing Scenario
- Creating A Site License
- Creating Undocked Users

### INI Files

- Using The LOOKUP.INI File

### HTML Features

- The GM+View Tab
- My GoldMine

### The Background

- Modifying the Background
- Adding A Logo
- Adding Background Text

### The Taskbar

- Task Items
- Task Groups