

Course Outline – Goldmine

Aims: Enables the delegates to utilise the Goldmine database to add, edit and track contact and colleague information.

Pre-requisites: Attendance of a Windows Introduction or a good understanding of the Windows environment including keyboard and mouse.

Duration: One Day

Adding Records

Creating A New Contact
F2 Lookup Windows
Lookup Entries
Proper completion of Record>
Duplicate Records

Finding Contacts

Moving Around Goldmine
The Contact Listing
Text Search

Contact Maintenance

Adding and Editing Contacts
Detail Records
Finding Detail Records
Adding A Note

Calendars

The Calendar
Rescheduling from the Calendar
Resizing The Calendar
Calendar Outline View

Scheduling

A Call
Setting An Alarm
The Phone Call
Completing The Call
Scheduling An Appointment
Completing An Appointment
Scheduling A Forecasted Sale

Introduction To Filters

Using Filters
Creating A Single Filter
Creating A Variable Filter

GoldMine E-Mail Features

Adding An E-Mail Address
The E-Mail Center
Reading E-Mail
Sending E-Mail

The Organization Chart

Using The Org Chart
Adding A New Section>
Replicating Data
Activating And Releasing A Section
Organization Chart Options

Overview of GM's Reports

Printing Reports
Reports And Filters

taking **IT** further

