

Advanced GoldMine Version 6

Aim

To ensure that users have an adequate understanding of some of the more advanced functions of GoldMine as a Workgroup Contact Manager – i.e. Querying, Creating Word Processing Templates, Using the Organisation Tree, Analysis and Statistics etc...

Pre-requisites

Students should already have a working knowledge of Windows and should have a good working knowledge of GoldMine.

Duration

Course is normally One Full Day - start time is 10.00am and we aim to finish around 4.30pm. Refreshments, provided throughout the day, and buffet lunch are included (If the course is held at Wizard Systems Training Centre).

Agenda

Overview of the Basic Features of GoldMine

Tracking Opportunity/Projects

- Creating and Using the Opportunity and Project Manager

Preferences in GoldMine

- Amending Your Preferences
- Using & Amending the Toolbar
- Creating simple Macros to save time

Creating subsets of your database

- Creating a Filter
- Optimising a Filter
- Creating Groups
- When to use a Filter or a Group

Using the Organisation Tree

- Creating a 'Tree'
- Adding New Contacts
- Changing/Editing Information

Additional Features (Optional)

- Record Alerts
- Literature Fulfilment Centre

Using the Info Centre

- Finding Information
- Adding New Topics
- Attaching Files

Word Processing

- Creating Templates for Letters, Faxes & Forms
- Carrying Out a Mailing Campaign

Analysis

- Statistical Analysis
- Graphical Analysis
- Forecast Analysis
- Leads Analysis

Reports

- Report Options
- Creating New Reports & Cloning
- Basic Expressions
- Query/Search options