

What our customers had to say:

"I have learnt a great deal today. I look forward to going back to the office tomorrow to use the Software" **Haynes Publishing**

"Good course, was very helpful" **Gasworld**

"Very good Training course and presentation" **Securicor Wireless Technology**

"This was a very good course and met my objectives" **Renishaw Plc**

"Very informative and well run" **Lloyds TSB Autolease**

- On line training
- Classroom training
- On site training
- Real time training



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 is included (If the course is held at the Wizard Systems Training Centre).

Why choose Wizard Systems?

- Training providers since 1993
- Courses are friendly, informal and run in small groups
- Plenty of hands on experience and exercises
- In training surveys 100% of attendees said they would recommend our training to others

Wizard Systems (UK) Ltd
Unit 7 Badminton Court
Station Road
Yate, BS37 5HZ, UK
Tel 01454 316800
www.wizard-systems.com

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/Options
- 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 Relationship Tab

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

Additional Features (Optional)

- Record Alerts
- Literature Fulfillment Centre

Using the Info Centre / Knowledgebase

- 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

