

Introduction to GoldMine

Aim

To ensure that users have an adequate understanding of the basic functions of GoldMine as a Network Contact Manager – i.e. Finding Information, entering new information, scheduling and managing Activities, and basic correspondence.

Pre-requisites

Students should already have a working knowledge of Windows and/or Windows applications like Word Processing or Databases

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 and Introduction to GoldMine – Why do we use GoldMine?

Layout of the GoldMine screens

- The Tool Bar
- GoldMine Objects
- The Tab Bar, user defined Fields, Contacts, Profiles, GM+View, Referrals, Pending, History and Links

Finding Information

- Quick searches by Company Name, Contact Name etc...
- Windows Shortcuts, Ctrl-PgUp etc...
- Contact Listing Options
- Query/Search options

Entering New Contact Records

- GoldMine Lookup Tables
- Entering Additional Contacts
- Entering Detail Records
- Creating Referral Records

Activities

- Scheduling a Call Back
- Scheduling an Appointment through the Calendar
- Scheduling a Literature request

- The Activity List and its options
- The Calendar and its options
- Completing Activities
- Sending and Email Message
- Sales Forecasting/Tracking

Correspondence

- Creating and Printing a Letter

Database Subsets

- Creating simple queries and filters

Reports

- Printing Phone Lists, Contact Lists and Activity Lists

User Preferences

- An overview of user defined preferences
- Calendar Holidays

GoldMine Knowledgebase

- Knowledgebase
- Personal base
- Creating topics
- Searching for information or text



“Excellent – Amazed at what detail/power GoldMine has.” **Sungard**

“Good clear instruction ~ very logical Thankyou!” **Medics on the Move**

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

“Very informative and well run – Not having seen or worked with GoldMine this was a good introduction course” **Lloyds TSB Autolease**

“Brilliant course, really well delivered and covered all the areas I was interested in” **T4 Media**