


<b>GoldMine Introduction – 2 days</b>		
<p><b>Course Objectives</b></p> <p>This course has been designed to introduce the delegate to the GoldMine software application.</p> <p>The objective of this course is to provide end-user training in GoldMine. When the delegates return to the workplace, they will be able to use GoldMine in their day-to-day working environment.</p> <p><b>Prerequisites</b></p> <p>Ideally the candidates should have a good working knowledge of the Windows environment.</p> <p><b>Course Content</b></p> <p><b>GoldMine Overview</b></p> <ul style="list-style-type: none"> <li>• What is GoldMine?</li> </ul> <p><b>Navigating GoldMine</b></p> <ul style="list-style-type: none"> <li>• Opening &amp; Navigating the Database</li> <li>• The Main screen &amp; Icons in detail</li> <li>• The active window</li> <li>• The status bar</li> <li>• The Main Contact Screen</li> </ul> <p><b>Contacts</b></p> <ul style="list-style-type: none"> <li>• Creating New Contact Record</li> <li>• Creating a duplicate record</li> <li>• Working with the look up lists</li> <li>• Entering additional information</li> <li>• Deleting a contact record</li> <li>• Primary &amp; Secondary contacts</li> <li>• Search for Contacts</li> </ul> <p><b>Adding Additional Information</b></p> <ul style="list-style-type: none"> <li>• Viewing the contact list</li> <li>• Other searches</li> </ul> <p><b>Using the Organisation Chart</b></p>	<p><b>Scheduling Activities</b></p> <ul style="list-style-type: none"> <li>• Scheduling activities e.g. phone calls, meetings and sales</li> <li>• Understanding the activity list</li> <li>• Handling and setting alarms</li> <li>• Completing &amp; following up activities</li> <li>• Viewing activities through activity list</li> <li>• Tagging records – why and how</li> </ul> <p><b>The Graphical Calendar</b></p> <ul style="list-style-type: none"> <li>• Understanding the calendar</li> <li>• Different calendar views</li> </ul> <p><b>Sales Forecasting, Opportunity and Project Management</b></p> <p><b>Using Basic Filters/Groups</b></p> <ul style="list-style-type: none"> <li>• What are they, how are they different</li> <li>• Creating a filter</li> <li>• Activating &amp; Releasing filters</li> <li>• Previewing a filter</li> <li>• Understanding criteria</li> <li>• Creating a group</li> <li>• Activating a group</li> </ul> <p><b>The GoldMine E-mail Centre</b></p> <ul style="list-style-type: none"> <li>• Sending e-mails from GoldMine</li> <li>• Send an email to an individual</li> <li>• Send an email to a filter/group</li> </ul> <p><b>Using GoldMine letter templates / Mail Merge</b></p> <ul style="list-style-type: none"> <li>• Communication via letters</li> <li>• Create an individual letter using existing templates</li> <li>• Creating your own templates</li> <li>• Using Goldmine to send mail shots to filters or groups</li> </ul> <p><b>Introduction to GoldMine Reports</b></p> <p><b>Customising the User Environment</b></p>	