

GOLDMINE[®] 8.X Premium Edition

Beginner – Course Overview

- ◆ **Introduction** – *HawkerSystems, Instructor, Students and Client Companies*
- ◆ **Getting Acquainted** – *Launching GoldMine, GoldMine's Look and Feel*
- ◆ **Adding Records** – *Creating a New Contact, Lookup Windows, Adding and Editing a Lookup Entry, The Zip Code Database, The Tab Bar, Duplicate Records*
- ◆ **Finding Contacts** – *Moving Around, The Contact Listing, Find Contacts, Text Search*
- ◆ **Contact Maintenance** - *Editing Contacts, Additional Contacts, Detail Records, Finding Detail Records, Deleting Contacts, Adding a Note, Searching Notes*
- ◆ **Calendars** – *Resizing the Calendar, Displaying Completed Activities, Calendar Outline View, The Activity List, Making Phone Calls*
- ◆ **Scheduling** – *Scheduling a Call or an Appointment, Setting an Alarm, Scheduling from the Calendar, Completing an Appointment, Scheduling a Forecast*
- ◆ **Filters** – *Creating a New Filter and a History Filter, Record Tagging*
- ◆ **Correspondence** – *Merging a Letter in Microsoft Word, Document Links*
- ◆ **E-mail** – *Adding an E-mail address, The E-mail Center, Reading and Sending E-mails*
- ◆ **Reports** – *Printing Reports, Reports and Filters, Report Sorts*
- ◆ **The Organization Chart** – *How to Use The Organization Chart, Managing Events, Adding a New Section, Replicating Data, Activating and Releasing a Section*
- ◆ **GoldMine's Preferences** – *Customize GoldMine to Your Own Preference*



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Advanced – Course Overview

- ◆ **Introduction** – *HawkerSystems, Instructor, Students and Client Companies*
- ◆ **Editing Contacts** – *Using Contact Files, Referrals*
- ◆ **Advanced Filters** – *Expressions, Creating and Editing a Complex Filter, Drill Down, Filter Limits*
- ◆ **Groups** – *Using and Sorting Groups, Adding a Member, Using a Filter to Add a Members, Creating New Groups*
- ◆ **Advanced Scheduling** – *Scheduling To-do Actions, Scheduling and Editing Recurring Events, Checking the Activities of Multiple Users, Scheduling an Event, Tracking Other Users' Activity, Scheduling an Activity for Multiple Contacts*
- ◆ **Advanced Correspondence** – *Dynamic Data Exchange, The Word Link, Creating a Letter Template in Word, Merging to a Group of Contacts, Copying Contact Details*
- ◆ **Literature Fulfillment** – *Scheduling and Fulfilling a Literature Request, Adding a Listing to the Literature List*
- ◆ **Messaging** – *Sending and Receiving a Phone Message, Sending and Receiving a GoldMine E-mail Message*
- ◆ **Advanced E-mail** – *E-mail Options and Rules, E-mail Templates, Cloning an Email Template, Merging Emails*
- ◆ **Customizing GoldMine** – *Expanded Detail Records, Setting up Detail Tabs and Field Labels, Creating and Editing Your Custom Screen, Defining and Placing Fields*
- ◆ **Opportunity/Project Management** – *Creating New Opportunity, Players and Tasks, Creating and Selecting an Opportunity Template, The Project Manager*
- ◆ **Case Management** – *Using Cases to Track and Resolve Customers' Technical/Service Issues*
- ◆ **Using the Info Center** – *Adding Documents in to the InfoCenter, Linking a file, Creating books and folders*

Get it done RIGHT, the FIRST time!



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System Administration – Course Overview

- ◆ **Introduction** – *HawkerSystems, Instructor, Students and Client Companies*
- ◆ **Setting Up GoldMine Users** – *Goldmine Users, Adding a New User, Record Ownership and Curtaining, Setting Access Rights, User Groups, Creating a User Template*
- ◆ **User Preferences** – *Appearance and Behavior, Calendar and Scheduling, Synchronization*
- ◆ **The Internet** – *E-mail Preferences and Rules, E-mail Templates, Merging E-mail, Internet Search*
- ◆ **Using the InfoCenter** – *Navigating and Working with the InfoCenter, Attaching a File, InfoCenter Import/Export*
- ◆ **Synchronization** – *Transferring Contacts between files, Creating and Retrieving a Transfer Set, Notebook Sync*
- ◆ **Customizing GoldMine** – *Lookup Window Settings, Expand Profiles, Setting up Profile Tabs and Field Labels, Global and Local Labels, Custom Screens, Defining Fields, Defining a View, Creating Custom Screen, Editing in Your Custom Screen*
- ◆ **Customizing Toolbars** – *Creating a New Toolbar, Working With Toolbar Icons, Recording and Deleting a Toolbar Macro, Toolbar Preferences*
- ◆ **Automated Processes** – *Defining and Creating a Track, Adding an Event, Attaching Tracks to Contacts, Executing and Editing a Track, Adding a Branch, Removing a Track, Executing Your New Track*
- ◆ **Data Maintenance** – *Indexing/Packing, The Merge/Purge Wizard, Merging Visible Records, Globally Replace Fields, Territory Realignment, GoldMine System Logs*
- ◆ **Importing and Exporting** – *File Formats, Exporting ASCII Delimited Files, Exporting DBF Files, Creating an Import Profile*
- ◆ **Telemarketing Scripts** – *Using and Creating Branching Scripts, Running Your New Branching Scripts*
- ◆ **License Manager** – *GoldMine License Types, Creating a Site License, Creating Undocked Users, Using Net-Update*
- ◆ **Using INI Files** – *The LOOKUP.INI Files*

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