

Table of Contents

Table of Contents.....	3
Welcome.....	5
In This Course.....	5
Starting GoldMine.....	6
Adding a New Record.....	8
Adding an Additional Contact.....	13
Finding Contacts “The Contact Search Center”	14
Summary Tab Fields.....	17
Contact Search Center Shortcuts.....	18
Recently Viewed Contacts	19
Finding Contacts “The Contact List”	21
GoldMine Window Layouts	23
Finding Contacts “Universal Search”	25
GoldMine Grid Controls	26
Using “Output to” Menus	29
Scheduling Activities	30
Next Action, Call, Appointment	30
Prioritizing Activities	32
Forecasted Sale	33
To-do’s	34
Using the Calendar.....	35
Using Alarms	37
Viewing your Calendar.....	39
Viewing Pending Activities.....	41
Pending Tab (Contact Specific)	41
Activity List (User Specific).....	42
Completing Activities	44
Completing an Appt, Call, or Next Action using the Activity List.....	44
Completing an Unscheduled Outgoing or Incoming Call.....	46
Completing a Forecasted Sale.....	47

Viewing Completed Activities	48
History Tab (Contact Specific).....	48
The E-mail Center.....	49
Working with E-mail.....	52
Internet E-mail vs. GoldMine E-mail	52
Sending Internet E-mail	53
Sending GM E-mail to Other GoldMine Users	55
Linking / Unlinking / Relink E-mails.....	58
Linking for the 1st time	58
Fixing a link.....	59
E-Mail Scenarios.....	60
Manually Linking an Existing Document to a Contact Record	66
Document Linking from Word & Excel	67
Analysis Reports.....	69
Sales Analysis	69
Statistical Analysis.....	70
Forecast Analysis.....	71
Dashboards	72
The Activity Dashboard	72
The Activity Summary Dashboard.....	76
Closing All Tabs	78
APPENDIX A.....	79
GoldMine Keyboard Shortcuts.....	79
APPENDIX B.....	80
Reducing the Contact Search Center Lookup List.....	80