

# Training Manual Checklist

- 1-Starting GoldMine & Screen Layout (2-pages)
- 1-Recently Viewed Contacts (2-pages)
- 1-Adding a New Record (5-pages)
- 1-Adding an Additional Contacts (1-page)
- 1-Convert Additional Contact to a New Record (1-page)
- 1-Swapping Additional Contact with Primary (1-page)
- 1-GoldMine Relationship Trees (7-pages)
- 1-Creating a New Contact Linked to a Relationship Tree (1-page)
- 2-Entering Notes (1-page)
- 2-Copying Contact Information (1-page)
- 2-Record Alerts (2-pages)
- 2-Managing Referral Relationships (2-pages)
- 3-Finding Contacts via the Contact Search Center (5-pages)
- 3-Contact Search Center Shortcuts (2-pages)
- 3-Sorting Contacts (1-page)
- 3-Finding Contacts via the Contact List (2-pages)
- 3-GoldMine Window Views (2-pages)
- 3-Finding Contacts via the Universal Search (1-page)
- 3-GoldMine Grid Controls (3-pages)
- 3-Using "Output to" Menus (1-page)
- 4-Scheduling Activities (Calls, Appts, Actions) (2-pages)
- 4-Scheduling a call to a Filter/Group (1-page)
- 4-Prioritizing Activities (1-page)
- 4-Scheduling Activities (Multiple Attendees) (2-pages)
- 4-Scheduling Activities (Multiple Users) (1-page)
- 4-Scheduling Activities (Recurring) (1-page)
- 4-Scheduling Activities (w/ no End Date) (1-page)
- 4-Scheduling Activities (Forecasted Sale) (1-page)
- 4-Scheduling Activities (To-do) (1-page)
- 4-Scheduling Activities Using the Calendar (2-pages)
- 4-GoldMine Alarms (2-pages)
- 4-Viewing your Calendar (2-pages)
- 4-Viewing Pending Activities (3-pages)
- 4-Completing Activities (6-pages)
- 4-Relinking History to Another Contact (1-page)
- 4-Viewing Completed Activities (1-page)
- 4-Hiding Contact Details (2-pages)
- 5a-Microsoft Outlook Link (11-pages)
- 5a-Microsoft Outlook Synchronization (4-pages)
- 5b-Microsoft Outlook Integration [GMPE 2017 or earlier] (15-pages)
- 5-The E-Mail Center (3-pages)
- 5-Working with E-Mail (3-pages)
- 5-GoldMine E-Mail (3-pages)
- 5-Using E-mail Templates (1-page)
- 5-Creating E-Mail Templates (2-pages)
- 5-HTML Images in E-Mail Templates (2-pages)
- 5-Personalizing Public Templates (2-pages)
- 5-Setting up Default E-Mail Templates (2-pages)
- 5-Linking, Unlinking, & Relinking E-mails (2-pages)
- 5-Forwarding vs Re-directing (2-pages)
- 5-Incoming E-mail Attachments (2-pages)
- 5-Email Scenarios (for GM e-mail) (8-pages)
  - 3<sup>rd</sup> Party e-mail that needs relinking
  - Redirecting e-mail to another user
  - Forwarding and Changing the Reference
- 5-E-Mail Merge Broadcasts (3-pages)
- 5-Creating E-mail Distribution Lists (2-pages)
- 5-Manually Linking Documents (1-pages)

Included in the standard "Up & Running with GoldMine" Courseware

- 5-Adding Folder Shortcuts as Links (2-pages)
- 5-Document Linking from Word & Excel (2-pages)
- 5-Creating Merge Document Templates (7-pages)
- 6-Introduction to Filter & Groups (7-pages)
- 6-Adding Members to an Existing Group (2-pages)
- 6-Constant Contact Integration (9-pages)
- 6-Social Media Views (3-pages)
- 7-Project Manager (3-pages)
- 7-Creating a New “Simple” Project (3-pages)
- 7-Adding Tasks to a Project (2-pages)
- 8-Creating Opportunities (7-pages)
- 8-Tracking Opportunity Activities (1-page)
- 8-Managing Opportunities (3-pages)
- 8-Closing Opportunities (4-pages)
- 8-Deleting an Opportunity (1-page)
- 8-Managing the Pipeline (3-pages)
- 8-Service Center (16-pages)
- 8-Territory Realignment (3-pages)
- 8-Running Automated Processes (1-page)
- 8-Analysis Reports (3-pages)
- 8-Dashboards (6-pages)
- 8-Closing All Tabs (1-page)
- 9-Personalizing GoldMine (The GoldMine Taskbar) (3-pages)
- 9-Lookups, References, & Codes
- 9-Record Ownership & Curtaining
- 9-Duplicate Record Merging (2-pages)
- 9-Importing & Exporting Data (15-pages)
- 9-Exporting Records (3-pages)
- 9-Keyboard Shortcuts (1-page)
- 9-Editing Record Alerts
- 9-Advanced Filters & Groups
- 9-Using the GoldMine Lookup Wizard (2-pages)
- 9-Configuring E-Mail Auto-Responders

- 9-Reducing the Contact Search Center Lookup List (2-pages)

#### Unique Lessons

- 10-Managing Contacts that Move (1-page)
- 10-Complete an Unexpected but Scheduled Incoming Call
- 10-Managing Your Day (1-page)
- 10-Email Etiquette (1-page)
- 10-Managing E-Mails for Others (2-pages) (centralized downloading)

#### Advanced Topics

- 11-Automated Processes – The Basics (9-pages)
- 11-Automated Processes – The Nuts & Bolts (13-pages)
- 11-Managing Automated Processes (5-pages)

#### Other Lessons Available

- Attach Plus (3-pages)
- GoldMine Mobile (4-pages)
- wMobile Desktop (48-pages)
- wMobile Phone (41-pages)
- Managing wMobile
- QuoteWerks (69-pages)
- Using GoldSMS
- Managing GoldSMS
- Stonefield Query Reports
- Setting Up Laser App Integration
- Using Laser App

#### Administration

- Introduction to SQL Queries (11-pages)
- Customizing GoldMine
- Managing User Accounts
- Deleting User Accounts (2-pages)
- Configuring Security
- Introduction to ini Files
- GoldMine Data Structure Detail