



UP & RUNNING WITH
GoldMine®

Updated for Premium Edition 2019



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Welcome

Welcome to Introduction to GoldMine training. This course will take you through the fundamentals of GoldMine Premium Edition. This course assumes you are new to GoldMine or have had no official training, but also assumes that you have general experience with Microsoft Windows, and subsequently fluent in the basics of how to use a keyboard and mouse, how to launch and exit applications and how to open, move, resize and close windows.

In This Course

This course will teach you the following:

- Help you familiarize yourself with GoldMine and its various screens
- How to add, edit, and find contacts
- How to schedule and complete activities
 - How to work with the Graphical Calendar
 - How to work with the Activity List
- How to Filter your data to improve searching efficiency
- How to work with GoldMine's E-Mail client
- How to manage linked documents
- and more...

Starting GoldMine

1. Double-click the GoldMine shortcut icon on your Windows desktop, *or* from the Windows taskbar select **Start**, then select **All Programs | GoldMine | GoldMine**.
2. Type your **Username** (if not already prefilled).
3. Type your unique **Password**.
4. Select **OK** (or just hit Enter).



Starting GoldMine (cont...)

GoldMine should then open to a standard GoldMine contact screen. Below is a screen capture of a typical contact record.

The screenshot displays the GoldMine Premium Edition interface for a contact record. The window title is "FrontRange GoldMine Premium Edition - [Art Bardtoll]". The menu bar includes File, Edit, Go To, Tools, Actions, Schedule, Complete, Web, Window, and Help. The toolbar contains icons for New Record, Search, Reports, Documents, Sale, Appointment, E-mail, Get Mail, Mail, Message, Ticker, Options, Getting Started, and Customize. The contact record for Art Bardtoll is shown, including fields for Company (American Bank), Contact (Art Bardtoll), Dept (Loan Officer), Title, Source, Address (2302 Whitman Avenue, Santa Monica, CA 90403), and Phone numbers. A table of activities is visible, with columns for Activity, Date, Time, Contact, User, Code, and Reference. The preview pane on the right shows details for the contact, including company information, alarm status, scheduled activities, and creation/update dates. Red arrows point to various UI elements with labels: "Standard Windows Pull-down menu" (menu bar), "Customizable Toolbar" (toolbar icons), "Recently Viewed List" (left sidebar list), "Navigation Bars" (left sidebar buttons), "Status Bar" (bottom bar), "Tabs of open windows" (top tabs), "Action Buttons" (top right buttons), "Customizable Taskbar" (top right taskbar area), and "Tab Bar" (bottom right tabs).

Standard Windows Pull-down menu

Customizable Toolbar

Recently Viewed List

Navigation Bars

Status Bar

Tabs of open windows

Action Buttons

Customizable Taskbar

Tab Bar

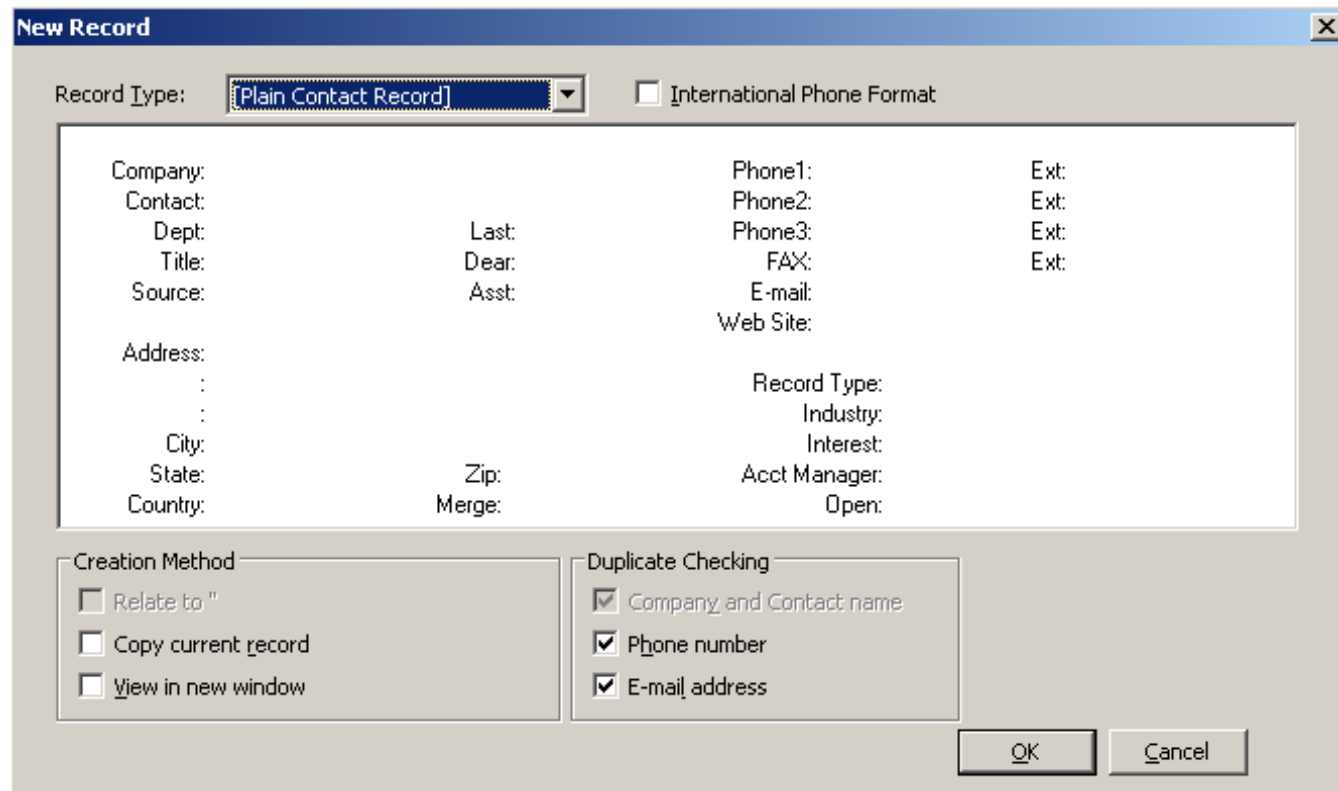
Preview Pane aAvailable throughout the program

Activity	Date	Time	Contact	User	Code	Refere...
Appt.	4/26/2014	3:00 pm	Art Bardtoll	ADMIN180 (1...		Present Prop...
Sale	5/26/2014		Art Bardtoll	ADMIN180 (1...		(\$113,000.00...

Adding a New Record

1. Click  on the GoldMine Screen.

The **New Record** screen will appear.



New Record

Record Type: [Plain Contact Record] International Phone Format

Company:		Phone1:	Ext:
Contact:		Phone2:	Ext:
Dept:	Last:	Phone3:	Ext:
Title:	Dear:	FAX:	Ext:
Source:	Asst:	E-mail:	
Address:		Web Site:	
:		Record Type:	
:		Industry:	
City:		Interest:	
State:	Zip:	Acct Manager:	
Country:	Merge:	Open:	

Creation Method

- Relate to "
- Copy current record
- View in new window

Duplicate Checking

- Company and Contact name
- Phone number
- E-mail address

OK Cancel

Adding a New Record (cont...)

2. If this will be an “out of country” record, select **International Phone Format**. Press  again.

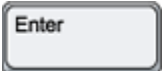
The white squares where you can type text are called *entry fields*. The blinking cursor shows you where you will be typing.

Pressing  moves you to the next field. Pressing  +  moves you back to the previous field.

You can also move through the fields randomly by using your mouse and clicking in the *entry field* area next to any field.


3. Type the name of the contact’s **Company**.
 - a. Enter names such as **ABC** without periods (**A.B.C**) or spaces (**A B C**).
 - b. Unless the company name is an abbreviation (ie. Cal A/C), please do not abbreviate (ie. **California Air Conditioning**).
 - c. Please use Proper Case (NOT ALL CAPS).

Note: When typing in the **Company** field, GoldMine try to help you along by auto-filling the field with data already in the database.

Do not press  that will assume you want to hit the **OK** button and will take you out of “Edit” mode.


4. Type the full name of the **Contact**. You will notice that the **Last** field has already been populated. Correct if needed.
5. Type in/select the **Dept** and **Title** fields if applicable.
6. The **Dear** field can be used for either the Salutation (**Mr.**, **Ms.**, **Mrs.**, etc.) or can be used for the name the person prefers to be called. (Contact = "**Robert Smith**", and Dear may be "**Bob**").
7. Enter the **Source** and **Asst** fields if available.

Adding a New Record (cont...)

8. Fill in the **Address** fields as needed. When you reach the 3rd **Address** field and press  GoldMine will skip **City** and **State** and take you straight to the **Zip** code field.
- Type in the **Zip**, and if the **City** and **State** are in the database, GoldMine will automatically enter those in for you.
 - If not, you will be prompted to enter this new **Zip** into the *zip code database*.

Note: It is recommended that you type in the **Zip** without the +4 first, let the City & State populate and then add the +4, rejecting the addition of the +4 into the lookup table.

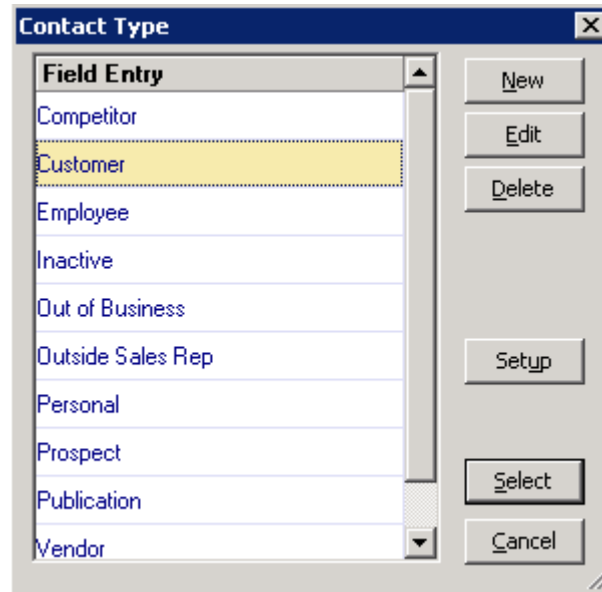
9. Complete the **Country** field. Some customers choose to fill this in ONLY for non-US Customers.
10. Continue navigating to the **Phone1** field and type a ten-digit *Phone Number*, such as [6025551234](#), in this field. (there is no need to enter parenthesis or dashes, GoldMine will do it for you).
11. Type in the **Ext(s)** if applicable or indicate what type of phone number this is.
(ie. [Cell](#), [Home](#), [Office](#), etc.)

12. Continue through any other phone numbers you have using the  to skip info you don't have.

13. Enter the primary **E-mail** and **Web Site** address if you have them. These fields are continuing to become increasingly valuable to businesses today.

Adding a New Record (cont...)

14. When you arrive at the **Record Type** field, click the lookup  button to the right of the field.



This will bring up the GoldMine lookup window for that field. Though you will find these kinds of lookup windows in almost every field in GoldMine, only those that are setup with lookup option will show a list of entries.

15. Find your desired entry and click the Select button, *or* simply press  on your keyboard to make the selection.

Alternatively, you can use the  key while in the field to bring up the lookup list.

Adding a New Record (cont...)

16. Continue with **Industry**, **Interest**, **Acct Manager**, and **Open**, choosing from the list of choices, if you have the information available.

17. Make sure ALL Duplicate Checking options are selected. (Phone number and E-mail address)

18. Click the **OK** button.

Once GoldMine creates a contact record, you can always continue entering data that you had skipped during the previous steps.