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A Day in the Life of a GoldMiner
(Or How I Learned to Love Databases)



GoldMine Version 6.5
End Users Edition

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A Day in the Life of a GoldMiner *(Or How I Learned to Love Databases)*

General Note: The F1 Key -- Use It! _____	4
Top 10 New Features in GoldMine Version 6.5 _____	5
I Perform a <i>Lookup</i> to Find a Contact Record _____	15
I <i>Create a New Record</i> for Joe Hudson _____	17
I Check My <i>Calendar</i> _____	19
I Check My <i>Activity List</i> _____	21
I Make <i>Calls</i> to My Contacts in Providence _____	23
I Schedule an <i>Appointment</i> with One of Them _____	25
I Schedule An App't with a Contact Using Another Calendar Program _____	27
One of My Contacts Requests a Meeting Via E-mail _____	29
I Get an <i>Alarm</i> _____	31
I <i>Complete</i> an Appointment _____	33
I <i>Schedule and Complete a Forecasted Sale</i> _____	35
I Take an <i>Incoming Call</i> from Robin Bartlett _____	37
I Make an <i>Outgoing Call</i> to Tell Him His Picture is in the Paper _____	39
I Send a <i>GoldMine E-mail</i> to My Tech Support Guy _____	41
I <i>Create an E-mail Template</i> to Send to My Top Accounts _____	43
I <i>Tag</i> Their Records _____	45
I <i>Merge</i> the E-mail Template to the "Top Accounts" _____	49
I Type an Invitation in <i>Microsoft® Word™</i> to an Upcoming Seminar _____	51
I Send the Invitation to a <i>Group</i> of Contacts _____	53
I Need to Identify All My Clients Who Live in Kansas City _____	55
I Print Out My <i>Activities Monthly</i> Calendar _____	57
I <i>Sync</i> , Therefore I Am _____	59
Icons & Their Associated Actions _____	61
Broadening Your GoldMine Horizons _____	63

Epilogue: I Take the Family to Palm Springs for the Weekend with a Small
Portion of My Bonus Money

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General Note: The F1 Key -- Use It!

Whenever you press the *F1* Key, GoldMine will display a Help screen that references the window in GoldMine that currently has *focus*. In other words, if your Calendar has a blue bar at the top (meaning it currently has *focus*), pressing *F1* will open a Help window with information specifically about using your Calendar.

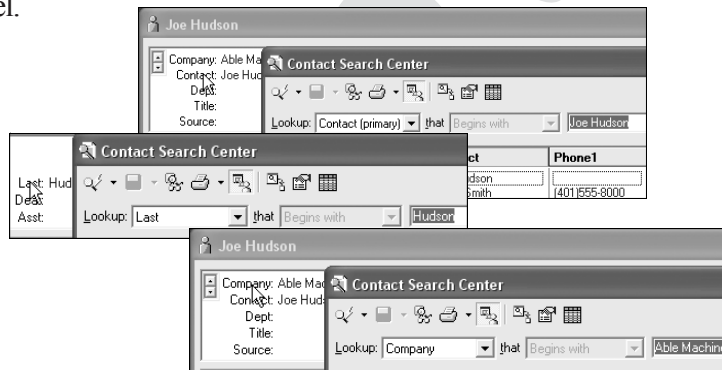
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I Perform a **Lookup** to Find a Contact Record

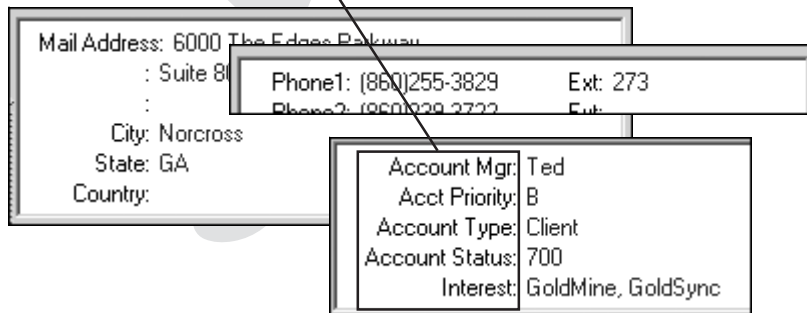
GoldMine's ability to quickly locate and display a contact record based on practically ANY field of information is powerful, to say the least.

The key to quickly locating any contact record is to double-click on the most appropriate field LABEL (not the data field).

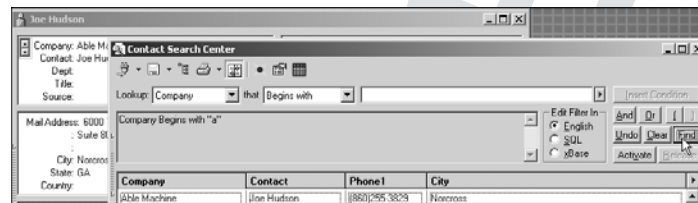
If you have only the contact's name, double-click on the *Contact* field label (entered first name, last name) or *Last* field label (entered last name only). If you have only a company name, double-click on the *Company* label.



Some GoldMine users don't realize they can also perform lookups by double-clicking on the *City*, *State* and *Zip* field labels; the *Phone1* field label; and any of the five *Key Field* labels.



GoldMine has several helpful features within the *Contact Search Center* to add flexibility when you're performing a Lookup. For example, below we created a *Search using Filters** for every record where the Company begins with "a," then clicked the *Find* button to have GoldMine display all the matches.



Below are the menu options available in the *Contact Search Center*.



1. You can perform Lookups using *Simple Search* (described on the previous page); *Search using Filters* (described above); *Search based on History, Calendar or Details...* (the *Group Building Wizard**); or Search using SQL Queries... (think of SQL Queries as very powerful Filters).
2. You can *Save the search criteria* for later use and/or build a group on the fly.
3. You can *View saved searches* to see all previously built Filters Groups or SQL Queries.
4. You can *Drill down search results* on the current Filter by defining additional criteria.
5. You can *Optimize the search filter* by selecting a sort order or setting start and end limits.
6. You can *Output search results* to a *Printer, Word, Excel* or the *Windows Clipboard*.
7. You can have GoldMine automatically display the record of the contact you've got highlighted in the search results window (this one is very handy).
8. You can shrink or expand the *Contact Search Center* window.
9. You can select search display *Preferences*.
10. You can add columns of your choice to the search results display (we added *City* to the one above).

*For more on *Filters* see page 55, for more on *Groups* see page 45.

I Create a New Record for Joe Hudson

Adding new records is good for the soul AND the bottom line, but make sure the contact doesn't already exist!

Click on the *Create New Record* icon.



Fill out the information in the *New Company and Contact* dialog box.

Remember to use *Tab* to move forward one field and *Shift-Tab* to move back one field. Of course, you can click into any field with the left mouse button.

Some tips; don't use punctuation when filling in the phone number, GoldMine will take care of all phone number formatting. Also, try to get E-mail information whenever possible. E-mail is, without doubt, the most convenient, cost-effective way to communicate. Checking the *International Format* box allows you to enter a phone number with letters, commas, spaces, etc. without having GoldMine perform any auto-formatting. Tip: try whenever possible to avoid using middle initials, prefixes or nicknames when entering the contact's name.

GoldMine offers you the option of checking for Duplicate Records on any combination of the Phone number, E-mail address, Contact name and Company name fields.

Once you've filled in all the fields you can, click *OK* and fill in the rest of the contact record with any available information.

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I Check My Calendar

The Calendar is the “traditional” place to view all scheduled activities.

Click on the Calendar icon.



You may view your calendar in *Day*, *Week*, *Month*, *Year*, *Planner* or *Outline* mode.

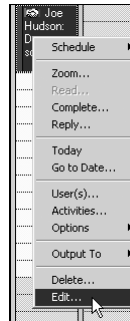


Use the left/right arrows to jump back or ahead.



For example, the forward arrow will take you ahead one week if you're in Week view, one month if you're in Month view, etc. The button in the middle will always take you to today's date. The icon to the right allows you to go to a date you specify.

To view more detail of any scheduled activity, right-click on the activity and select *Edit*.



Activities scheduled without an assigned time are displayed in the white area at the bottom (Week view), or to the right (Day view), of your Calendar.

Task	Pty	Code	Date	Reference
Call			1/3/2003	Joe Hudson: Setup appointment for new product presentation

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