



Rob Hawker Instructor

GoldMine Basics

- Getting Familiar with GoldMine
 - Launching GoldMine
 - Navigation
 - Customize GoldMine to Your Preference
- Contact Records
 - Creating a New Contact at a New Company
 - Add a New Contact at an Existing Company
 - Editing Contacts
 - Additional Contacts
 - Lookup Lists
 - Required Fields and Restrictions
 - Supplemental Data
 - Viewing History and Details
 - Print a Contact Record
- Searching
 - Finding Contacts
 - Add a Column
 - Move a Column
- Filters and Sorting
 - Column Results Filter
 - Create, Save, and Activate a Filter
 - Create a Complex Filter
 - Print/Export/Output Results
 - Sorting
- Calendars
 - Displaying the Calendar
 - Other Users Calendars
 - Multiple Calendars
 - Displaying Completed Activities
 - Activity List
- Scheduling
 - Scheduling a Call or an Appointment
 - Setting an Alarm
 - Scheduling from the Calendar
 - Completing an Appointment
- Correspondence
 - Merging a Letter in Microsoft Word
 - Document Links
- Reports
 - Reports Center
 - Setting Options