



## Rob Hawker Instructor

# GoldMine Sales

- Getting Familiar with GoldMine
  - Customize GoldMine to Your Preference
- Contact Records
  - Required Fields and Restrictions
  - Supplemental Data
  - Viewing History and Details
  - Print a Contact Record
- Searching
  - Finding Contacts
- Advanced Filters and Sorting
  - Column Results Filter
  - Create, Save, and Activate a Filter
  - Create a Complex Filter
  - Print/Export/Output Results
  - Sorting
- Opportunity/Project Management
  - Creating new Opptys
  - Forecasting Sales
  - Dashboard Reporting
- Calendars
  - Displaying the Calendar
  - Other Users Calendars
  - Multiple Calendars
  - Displaying Completed Activities
  - Activity List
- Scheduling
  - Scheduling a Call or an Appointment
  - Scheduling from the Calendar
  - Completing an Appointment
  - Completing a Sale
- Correspondence
- Reports
  - Reports Center
  - Setting Options