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GoldMine End User Training

Designed & Produced by Caltech I.T Ltd

INVESTOR IN PEOPLE

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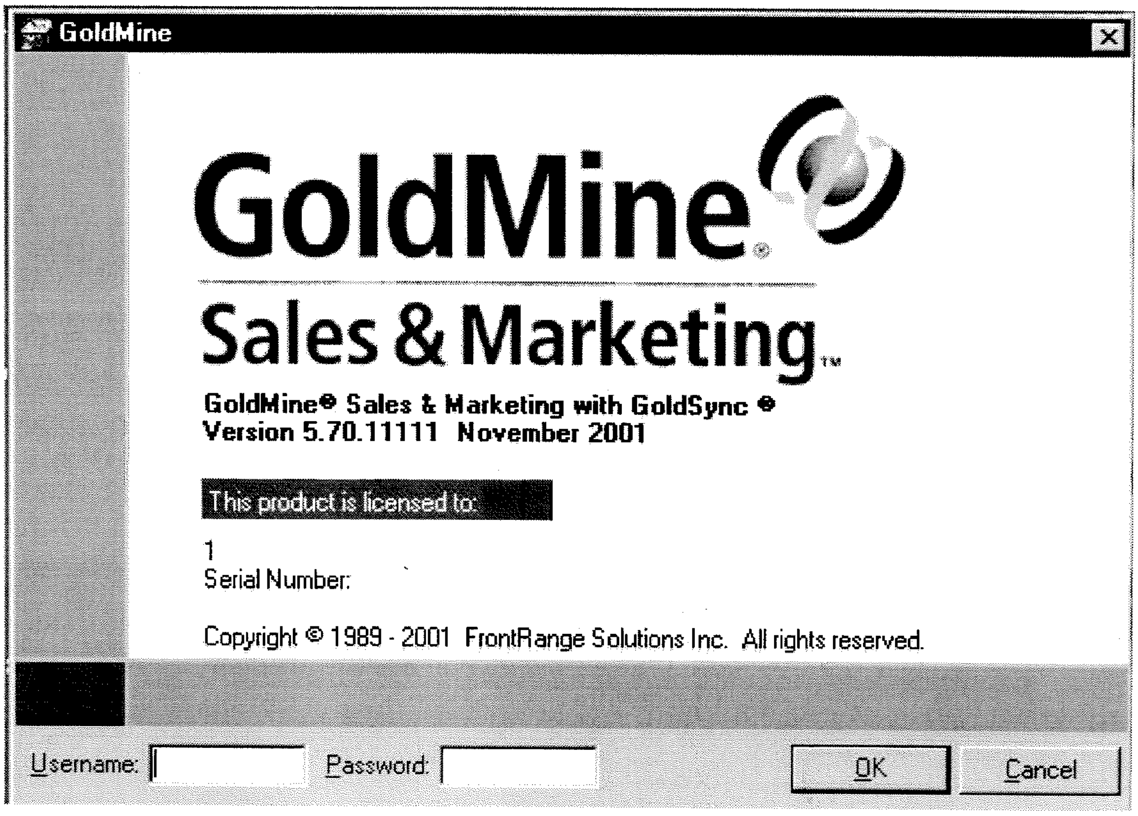
The GoldMine Opening Screen



After double clicking on the GoldMine Icon on the Desktop, the above Opening Screen will appear. To enter GoldMine you will need to type in your Username and Password, should you have one? Your Systems Administrator will set these up.

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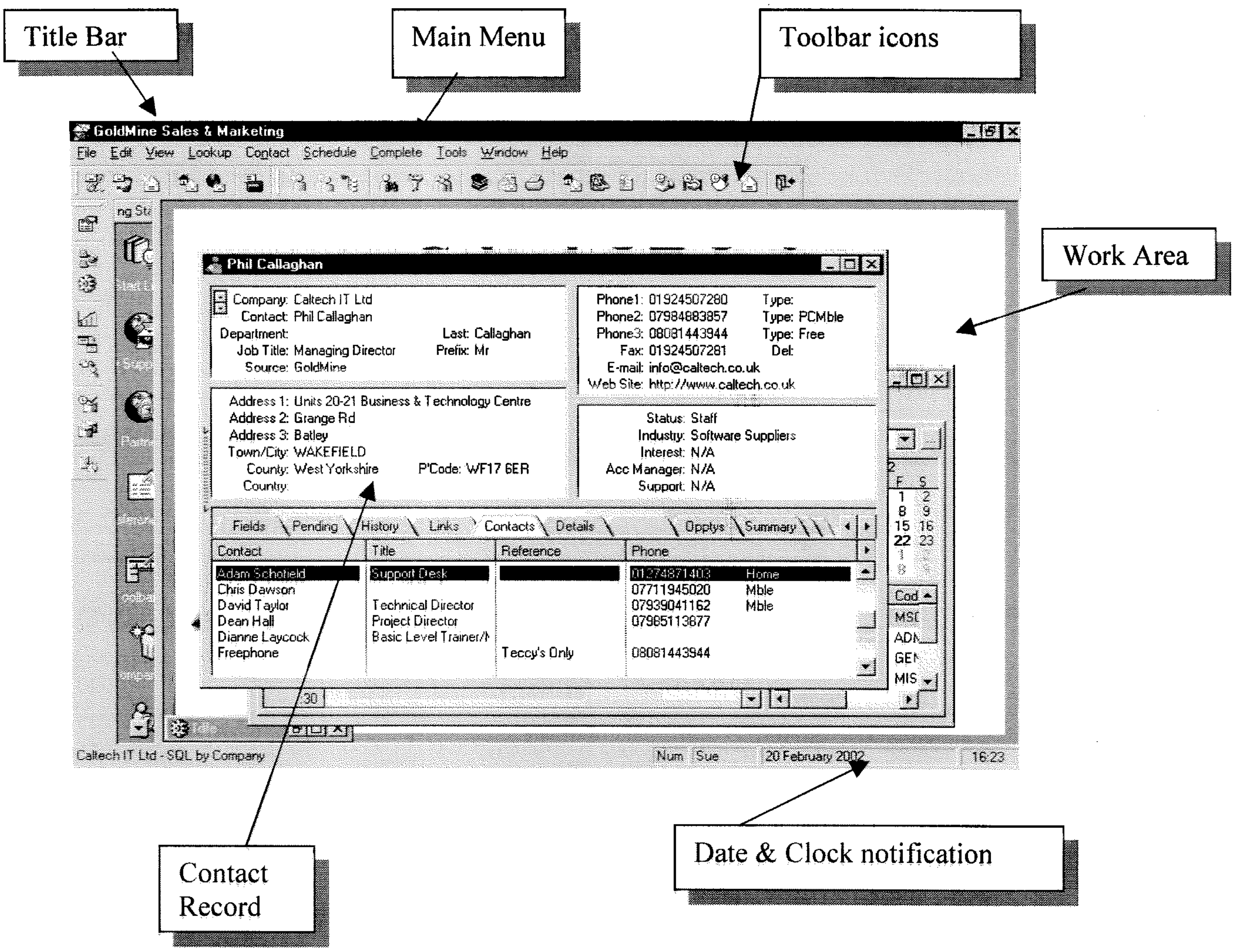
Introduction

GoldMine's contact screen consists of five components and the Contact Record: -



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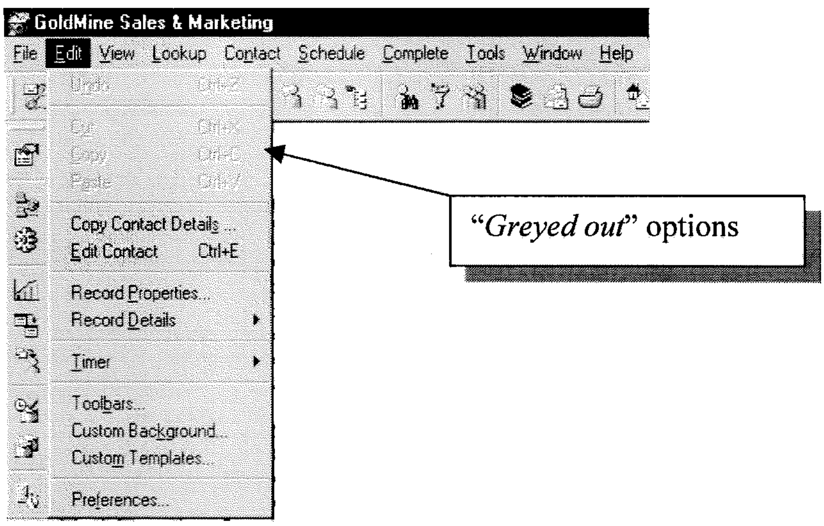
Menu's & Commands

The Main Menu offers the first level of commands, which define all the features available to that User.

Where appropriate, a menu option may have sub-menus; a right - pointing arrow will indicate these.

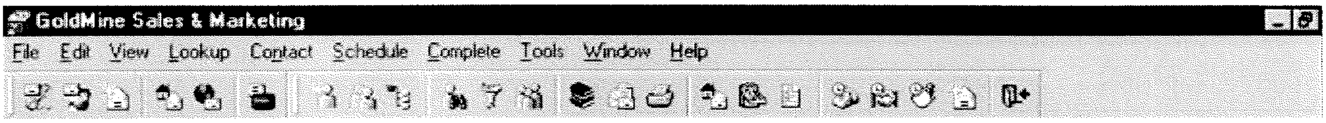
If a menu is 'greyed out', that function cannot be used by that User. This can be for three reasons: -

1. That option does not apply to the current selection
2. Another option must be activated before you can select the 'greyed out' option
3. Security restrictions based on your User name or User group prevents you accessing that option. The User with Master Rights is the only person who can set security options.

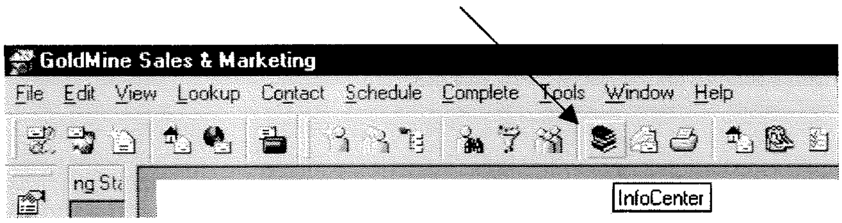


Toolbar Icons

These enable you to access the main options quickly.



When the mouse cursor is over the icon, a description of its function will be displayed on the Status Line and in a bubble over the icon.



Toolbars are fully configurable, subject to having the necessary rights. It is better to start with a toolbar that only shows the most commonly performed tasks. They can be displayed in large or small format.

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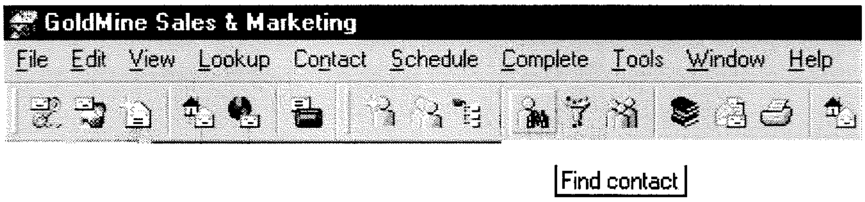
Managing Contact Records

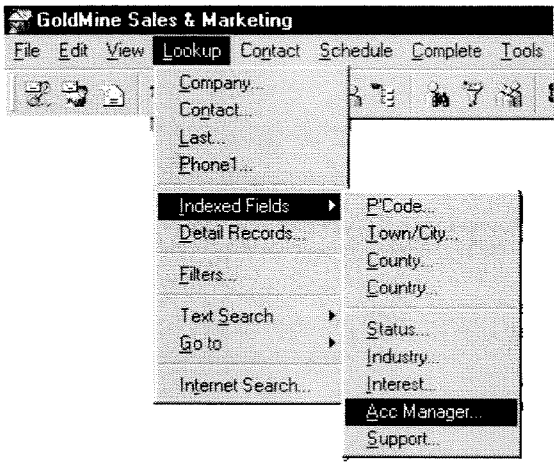
Lookup
This is the most important task to learn - you must be able to find the details of your contacts quickly and efficiently.



There are several different methods of searching for a record, depending on where the information is held within the database.

Indexed Fields
To search via an indexed field, either:

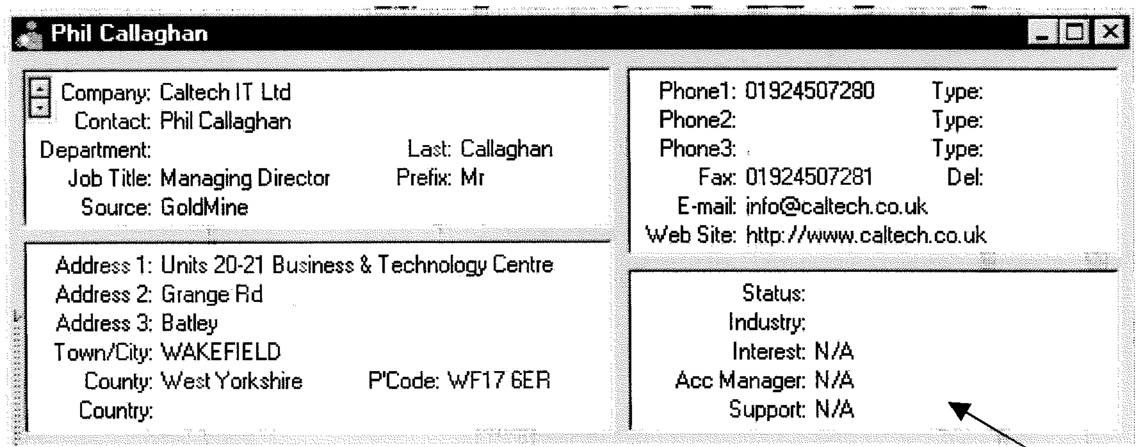
- Select **Lookup** and then the field by which you wish to search.
- Double - click on the contact record's label, i.e. the word **Contact.**



The fields listed are termed as Indexed fields, and they can all be double clicked on to sort or search by.

- Company
- Contact
- Last
- City
- County/State
- Postcode/Zip
- Country
- Phone1
- Key 1 -5

Detail Record



Phil Callaghan

Company: Caltech IT Ltd
Contact: Phil Callaghan
Department:
Last: Callaghan
Job Title: Managing Director
Prefix: Mr
Source: GoldMine

Phone1: 01924507280 Type:
Phone2: Type:
Phone3: Type:
Fax: 01924507281 Del:
E-mail: info@caltech.co.uk
Web Site: http://www.caltech.co.uk

Address 1: Units 20-21 Business & Technology Centre
Address 2: Grange Rd
Address 3: Batley
Town/City: WAKEFIELD
County: West Yorkshire
P'Code: WF17 6ER
Country:

Status:
Industry:
Interest: N/A
Acc Manager: N/A
Support: N/A

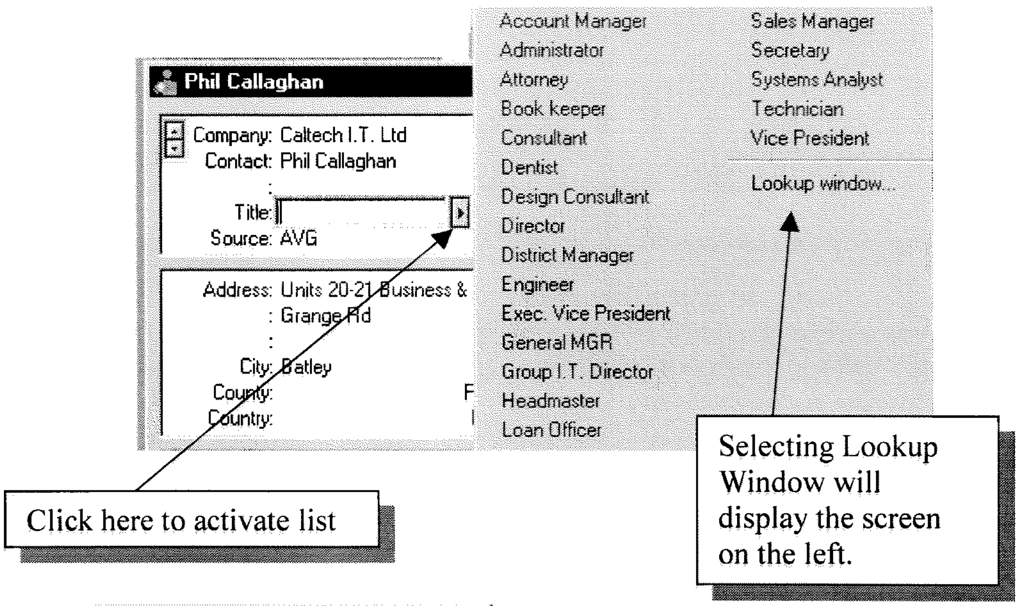
These are the five key fields.

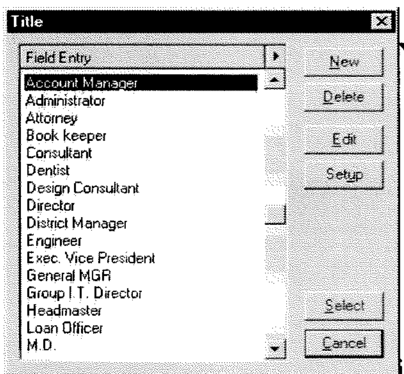
LookUp Tables

These allow you to select certain data from predefined 'pick - lists'.
The LookUp facility makes it faster to input routine data and ensures that the data is entered in a consistent way. There are three types of LookUp Tables: Text Table, Calendar, and Clock.

Text Tables.

These can be accessed for most field values.
Click on the arrow at the end of the selected field. This will display a list of lookup table entries that can be selected. (F2 or right clicking in the field will also displays this list). Highlight the required choice and click on the Select button in the Window view, or double click on the chosen entry.

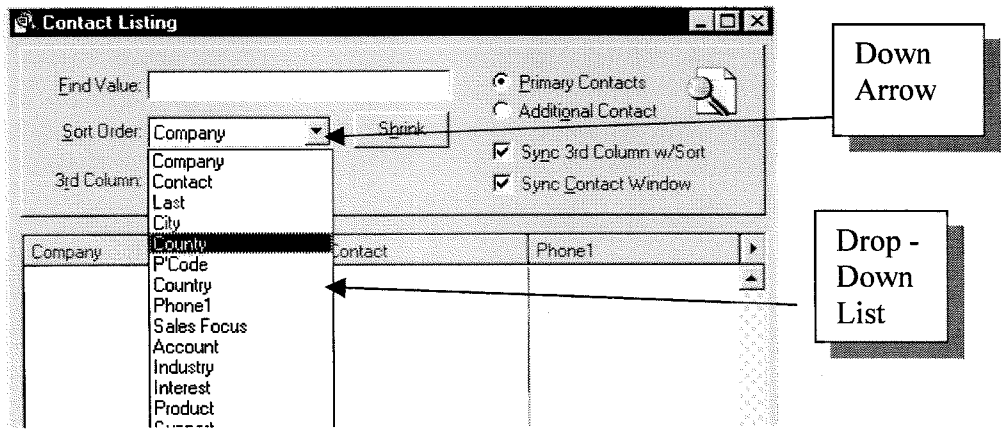




Selecting **New** enables you to add entries to the list.
Delete enables you to delete from the list.
Selecting **Edit** can amend existing entries.
Choosing **Select** allows you to choose the required option.

Drop - Down Lists

Throughout GoldMine there are various boxes containing **Drop-Down lists**. The down arrow at the end of the field box identifies these.



To select an item from these lists, first click on the down arrow. Use the cursors or your mouse to select the required item.

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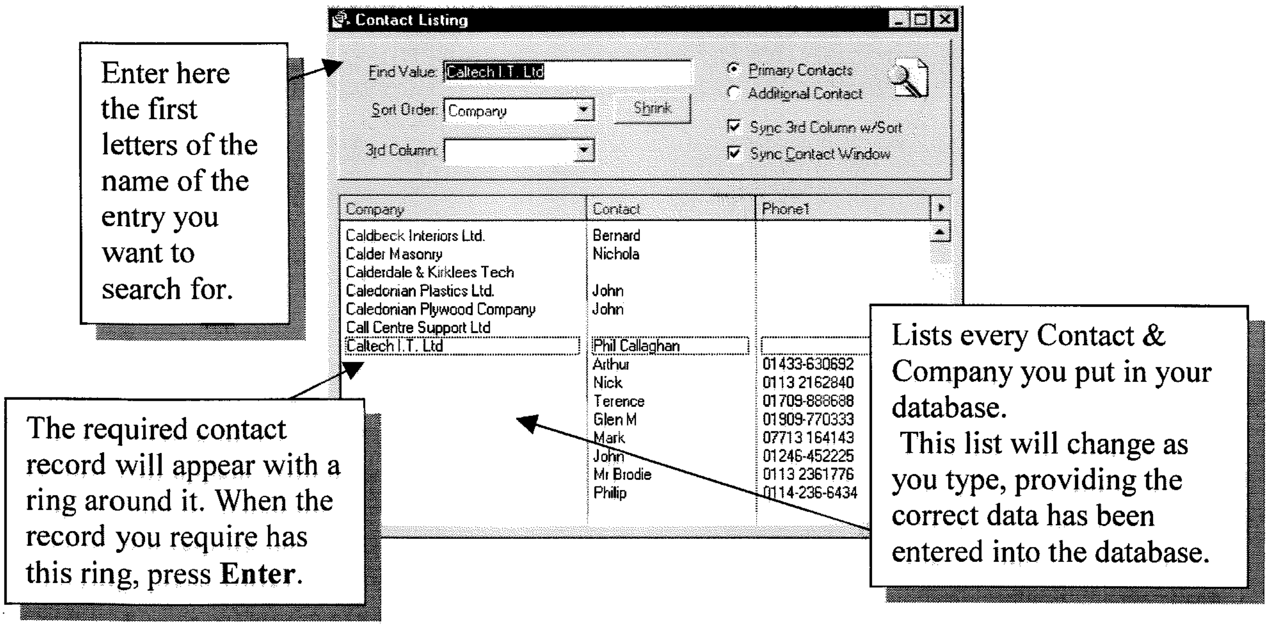
Identifying Your Contact

Whenever you search a Contact Listing window is displayed. This shows three columns of information:

- Company Name
- Contact Name
- Any Primary field or user-defined field by changing the 3rd Column Field.



Find Value - The actual item being searched for, E.g. Company Name or Contact Name or the Phone Number.
Sort Order- This determines the field on which GoldMine will search. This can be changed at any time. E.g. Contact, Company, Phone 1
3rd Column - This determines which field will be displayed in the 3rd Column.
Primary Contacts - This allows you to search for contacts in the Primary Contact area of the database.
Additional Contacts - This allows you to find a contact record with an Additional Contact that matches the contact name entered.
Sync 3rd Column w/Sort - This changes the 3rd column to display sort criteria specified in the Sort Order box.
Sync Contact Window - This automatically selects whichever record has been highlighted in the Contact Listing window.

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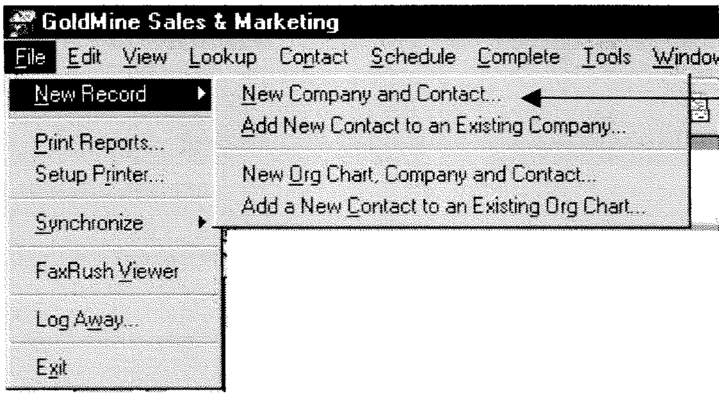
Entering a New Primary Contact Record.

<u>**NB** It is important to note that all data must be entered in proper case. This helps with formatting to Word links and also makes searching for contacts easier.</u>



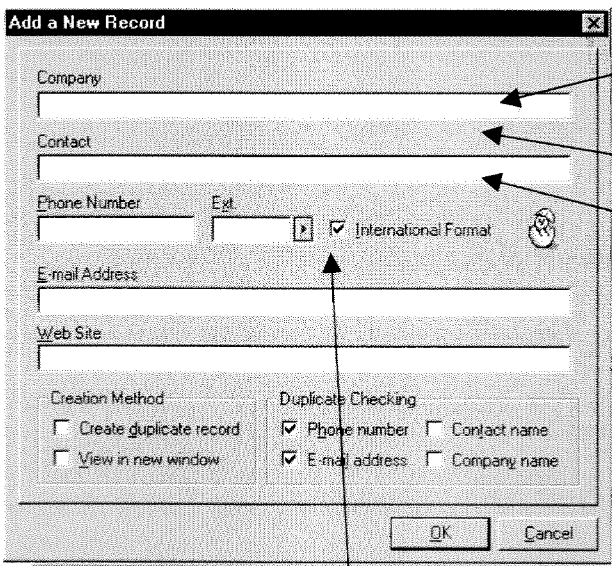
Selecting this will produce the box as shown below.

To add a new contact record to your database, **File>>New Record**.

Ensure that the **<u>International Format</u>** box is ticked.

Create Duplicate Record - This option copies information into the new record from the last views contact record.

View in New Window - This option will result in two contact records on the screen. The last one viewed, and the new one.



Enter here the name of the New Company.

Click **OK** or press **Enter** when you are happy.

Enter Primary Contact for the Company.

Duplicate Checking - Specify the level of duplicate checking required by placing a check mark by the relevant option: Phone Number, E-mail, Contact Name, Company Name.

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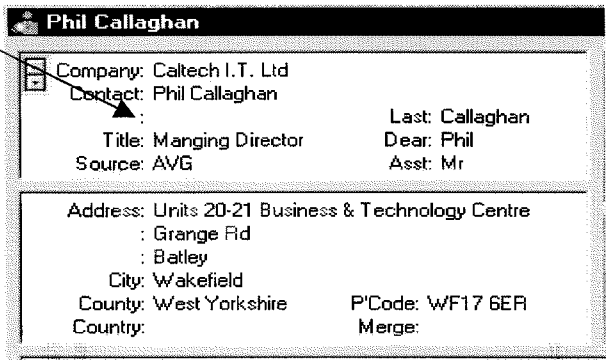
Adding Primary Information to the Contact Record.

Once you have created a new record following the steps mentioned over the page, GoldMine will prompt you to continue to enter data on the contact record by highlighting the **Dept** field.

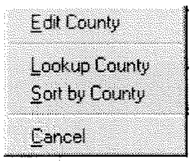
Depending on how your GoldMine has been set up, there may not be a Dept title present.



Continue through each field in the primary area of the contact record by pressing the tab key or by using the mouse.

A field can be edited in one of two ways:

- Left click to the right of the label on the field you wish to add/update.
- Right click over the field you wish to add/update and select **Edit Field Name.**



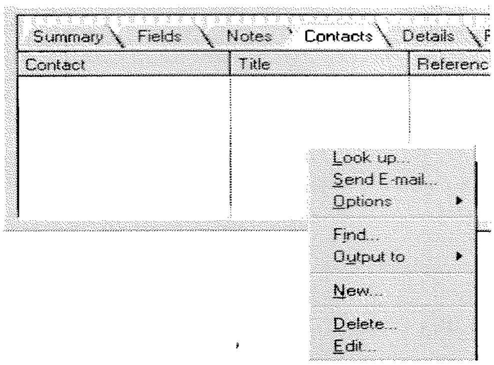
GoldMine automatically saves your entries as soon as you **tab** to the next field or press **Enter.**

Entering Additional Contacts
When you create a record, the name entered in the primary half of the contact record is referred to as the primary contact - your main contact.

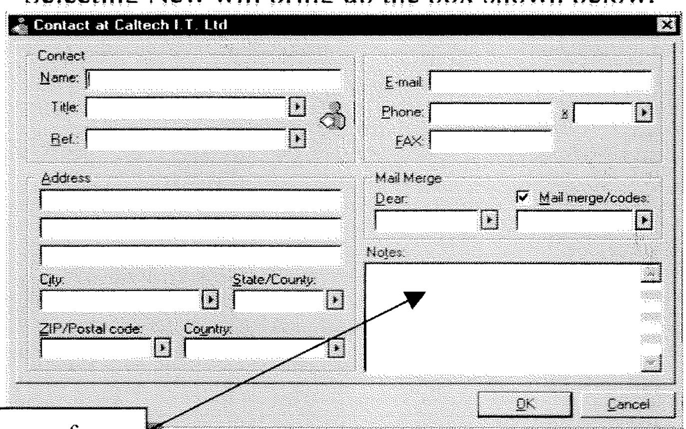
As your relationship with the contact develops, it is likely that you will begin to meet others from that same organisation, and you will want to record these names.

The **Contacts** tab will allow you to store basic information about additional contacts, such as name, address, phone number, etc. Activities can be scheduled to the additional contact, and the contact can be identified for a mail shot by the use of the **Merge Code** field.

To add additional contact, right click under the **Contacts** tab and select **New**.



Selecting New will bring up the box shown below.



Enter here any free form notes regarding the

When you're finished, click **OK** or press **Enter.**
Edit will allow you to amend an entry already listed.

1. In the **Name** field enter the full name of the contact, as you would address them on the envelope.
The **Ref.** Field is displayed on the contact tab, so information about the additional contact would be useful here.
The **Address** fields can be left blank if the address is the same as the primary contact.
2. The **Dear** field can contain how you would address the person in the letter, e.g. Mike or Mr. Smith
3. The **Mail Merge/Codes** field allows you to enter a user-defined code against the record in order to identify the record letter for mass selling purposes.

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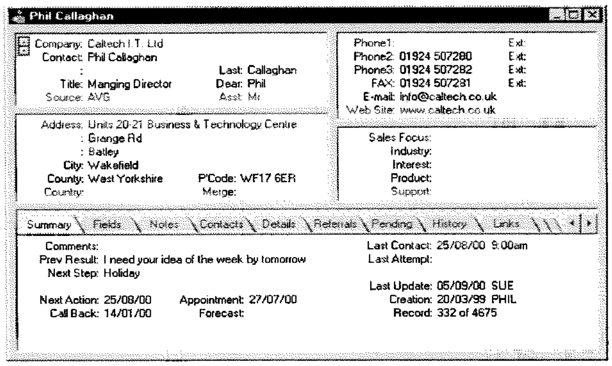
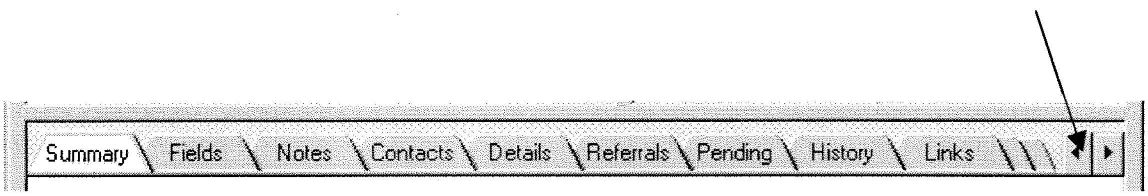
Contact Tabs

These can be found at the bottom of the Record Window. They are selected via the mouse or keyboard and contain information relating to the current contact record displayed.



There are 13 altogether but additional ones can be added by your systems administrator. There are four additional contact tabs that can be accessed by clicking on the Spin Buttons.



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The Contact Tabs have specific functions.

Summary (CTRL+S) - Shows who created the record and when, the total number of records in the database, the last and next scheduled activities.

Fields (CTRL+N) - User defined fields tailored for your organisation. Fields can be logically grouped into Views.

Notes (CTRL+N) - Miscellaneous company information shown with the User name, along with date and time reference.

Contacts (CTRL+C) - Limited information relating to other contacts at the company.

Details (CTRL+O) - Definable field information for many similar record entries, e.g. Hobbies.

Referrals (CTRL+R) - Links or relationships to other contact records, allowing you to jump to the referred contact directly.

Pending (CTRL+P) - Displays a list of all activities scheduled for the contact.

History (CTRL+L) - Shows all of the completed activities for the contact.

Links (CTRL+L) - Any Windows file that you choose to attach to the record.

Members (CTRL+M) - Displays membership of specific Contact Groups.

Tracks (CTRL+T) - Shows whether an Automated Process or Track has been attached to a record.

Oppys (CTRL+Y) - Displays any Opportunities associated with the record.

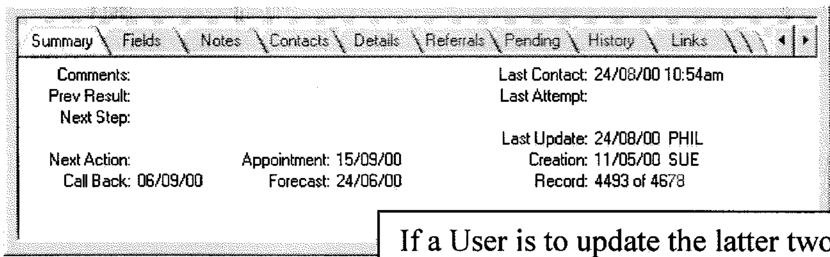
Projects (CTRL+J) - Displays any projects associated with the record.

Managing Contact Records.

Summary Information.
As soon as a User completes or schedules an activity or updates the record, this tab is updated in GoldMine.

The only fields that are updateable are: -

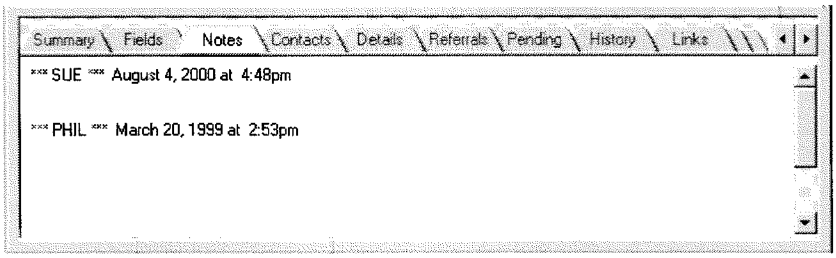
- Comments
- Previous Result
- Next Step



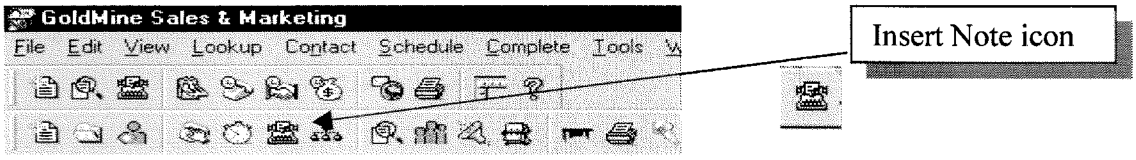
If a User is to update the latter two fields, GoldMine will overwrite whatever has been written when a new activity has occurred on the record.

Entering Notes

Free form notes are kept under the Notes tab.



To insert a note: - Edit>>Insert Note or click on the icon shown below and then enter your text.****NB**** Use of the Notes tab should be carefully controlled. Notes concerning



activities should be entered into the activity notes area when creating or completing the activity.

Scheduling Activities.
Different Activity Types.

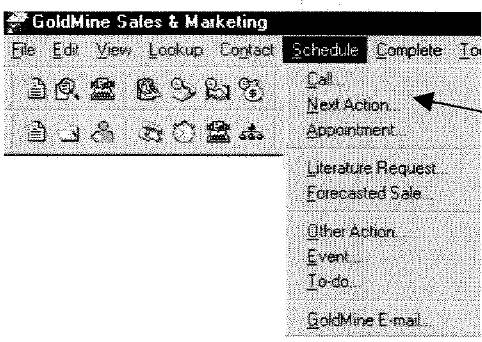
GoldMine allows you to schedule a variety of activity types against a contact.

The types of activity available are: -

- **Call** - A planned outgoing telephone call to be made in the future. Unscheduled outgoing and incoming calls can also be recorded.
- **Next Action** - Scheduled manual tasks, such as checking to see if something has been done.
- **Appointment** - Planned date - specific meetings with contacts or meetings between members of your own organisation.
- **Literature Requests** - An activity that logs particular documents or brochures to be sent to the contact.
- **Forecasted Sale** - The anticipated close date of a pending sale with one of your contacts.
- **Other Action** - Miscellaneous activities that fall outside the other activity categories defined in this list.
- **Event** - Date specific activities for one or more days, such as exhibitions or conferences.
- **To-Do** - Priority ranked activities that do not have a date and appear on a separate To-Do list. They are not linked by default to the record.

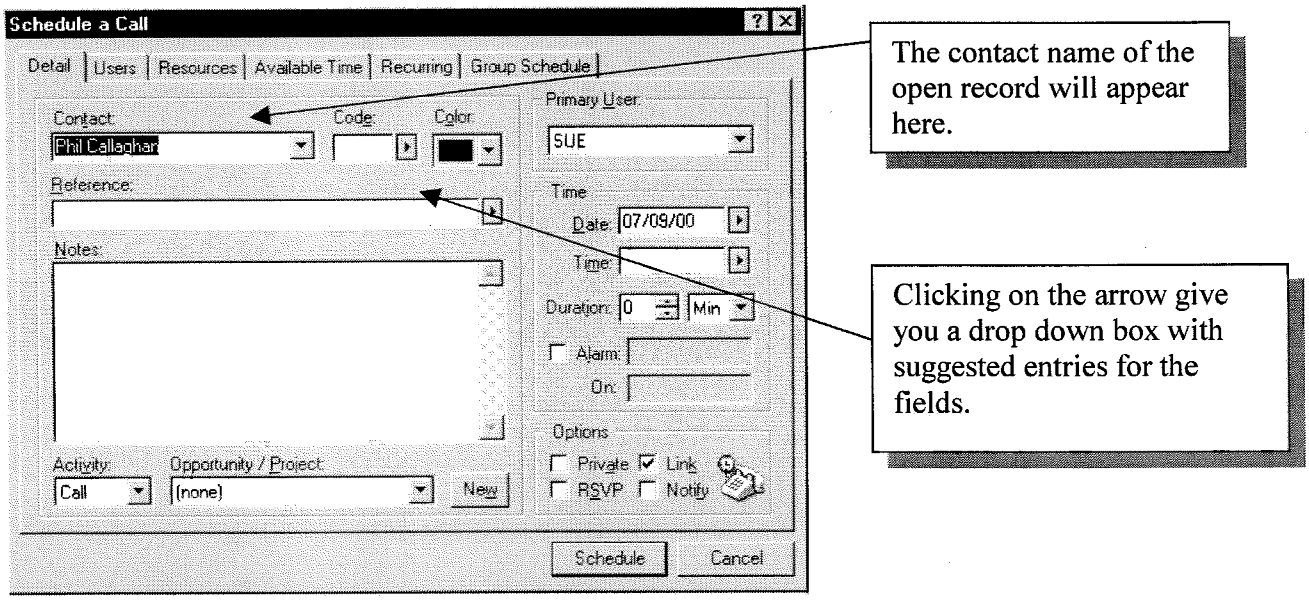
An activity is always associated with a User, it does not have to be directly associated with a contact.

When linked via a network, you can co-ordinate with other users' calendars creating a singe integrated scheduling solution. These activities can be used to delegate work, plan personal calendars, and establish routine operations.



To schedule an activity, select **Schedule** and the type of activity required.

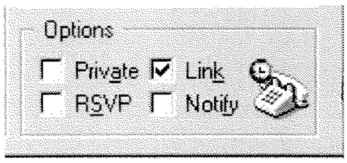
When scheduling an activity, an activity details box will appear. The example shown below is the Schedule a call box: -



Contact - Name of the person to whom the activity is related. This field will default to the primary contact, by clicking on the arrow a drop down box will appear with a list of the additional contacts.
Code - Job code or identifier that categorises the activity.
Colour - Allows the user to allocate a colour against the activity's purpose. E.g. Red could be for an urgent activity, blue for a none urgent activity.
Reference - A description of the activity, e.g. Return Call. A lookup table is available for each activity type.
Notes- Displays additional detailed information associated with the activity. Useful to remind a user to take certain things to a meeting or for putting in brief details about the reason for calling, etc.
Primary User - Defaults to the currently logged in user name. Scheduling activities to other users can be achieved by clicking on the drop down list and selecting the required user name.
Date - The calendar date on which the activity should be completed. A lookup table is available to help select a date, by pressing F4.
Time - The time that the activity is to be completed. A lookup table is available to help select a time. Click on the arrow.

Duration - The anticipated length of time for this activity to be completed in hours and minutes.
Alarm - The alarm toggle allows you to set an alarm for the activity.

Other Options



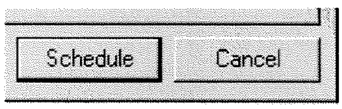
Private - An activity can be made private, preventing all other users (except Systems Administrator) from seeing the detail of the activity.

RSVP - When scheduling for other people, the RSVP can be set. This is so that when the activity has been completed or deleted a message is sent to the creator letting them know.

Notify - Sends an e-mail message to any users for whom the activity is scheduled or when a scheduled activity is changed.

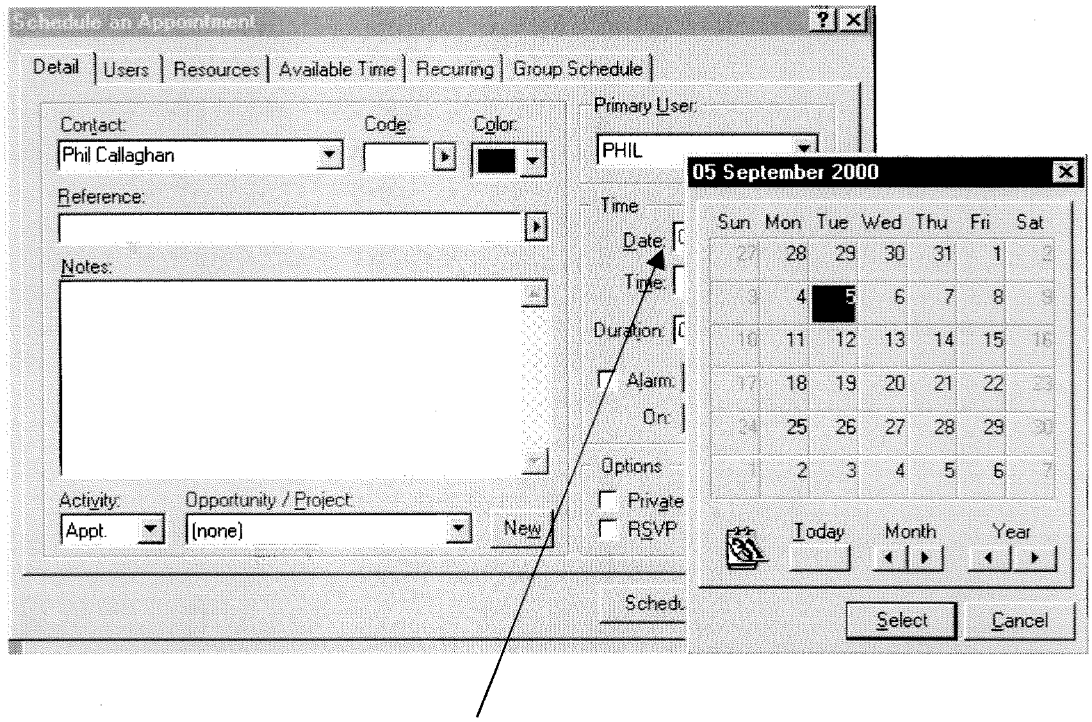
Link - This allows you to create an activity not linked to any contact record. If you wish to create an unlinked activity, uncheck this box.

Once all required details are completed, press **Schedule.**



Calendar LookUp Table

The Calendar Lookup can be access from the Date field when scheduling an activity.



To activate this lookup, right click in the selected field, or click on the arrow. Pressing F2 will also do the same.

Today's date will automatically be highlighted. Using the Month and Year buttons helps you jump between months and years. The Today button always brings you back to the present date.

Weekends are 'greyed out' to show that they are weekends, but they can still be selected.

Double clicking on the specified date or clicking on the Select button, selects the required date.

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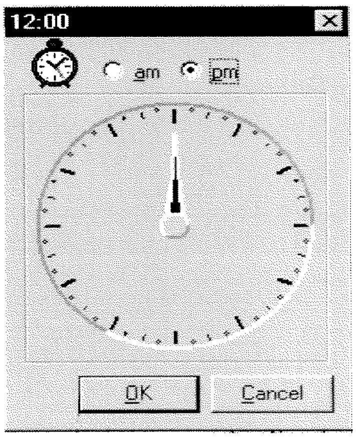
Clock LookUp Table

The Clock can be accessed from the Time field when scheduling an activity



To activate and use this lookup, right click or press the F2 Key in the selected field, or click on the arrow.
Select the correct time by clicking around the perimeter.
The clock is split into 15-minute time segments.
You only ever position the hour hand.

Specify a.m. or p.m.

Select OK when the correct time is displayed.

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Scheduling To – Dos

Date or time does not govern To-Dos, and they are not linked to a contact record by default.

They are useful for helping you manage your time more effectively.

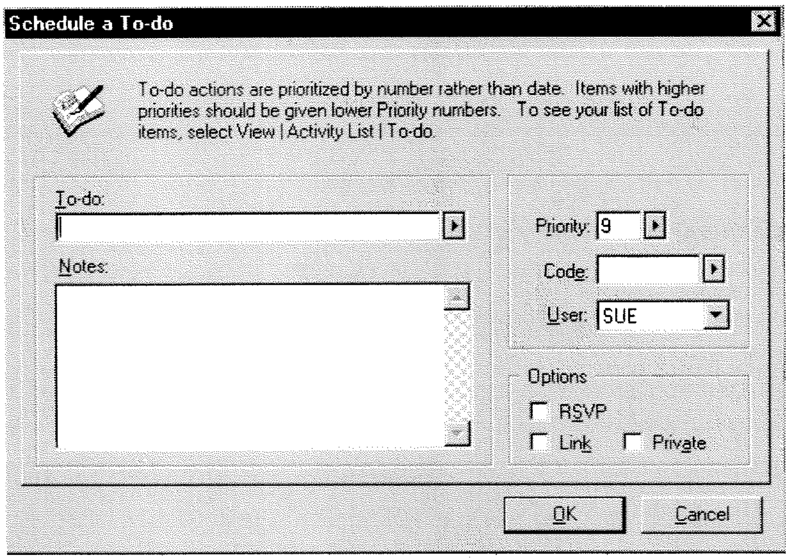
To schedule a To-Do.

Select **Schedule>>To-Do** from the main menu.

Enter a description for the **To-Do** and any applicable **Notes**.

Enter a **Priority** from 1-9 and a **Code**

Click **OK**.



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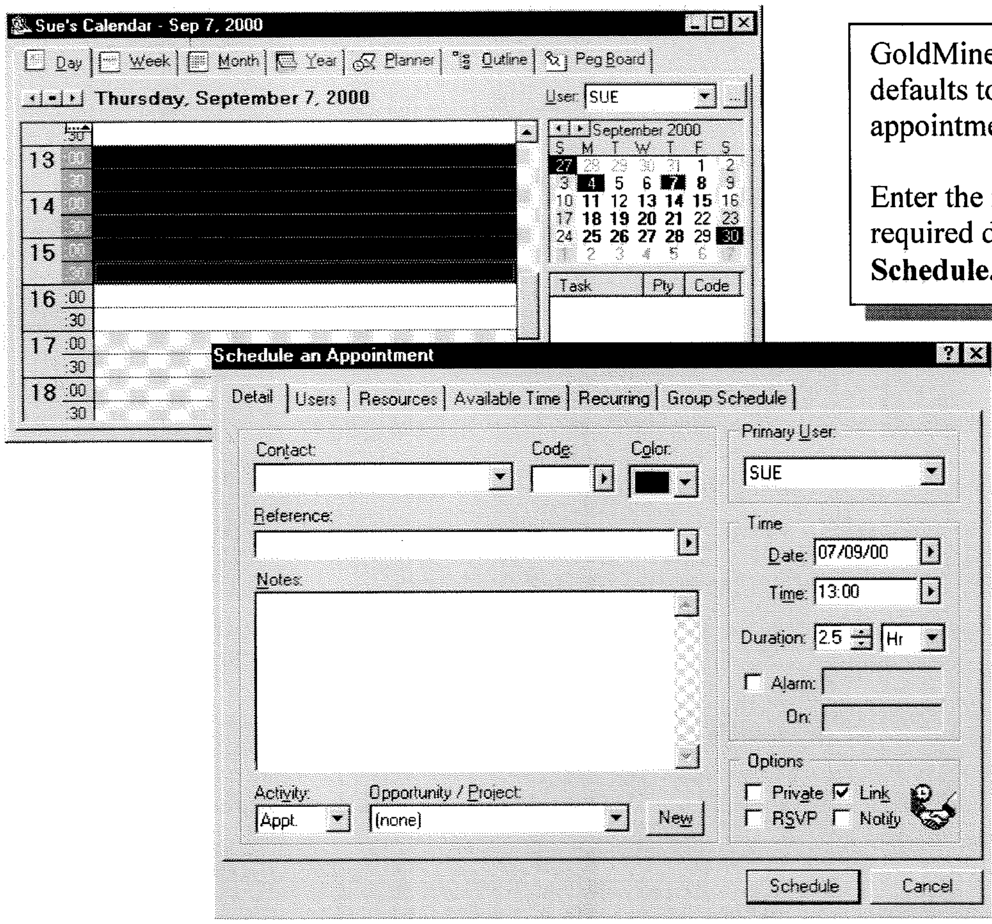
Scheduling Directly onto the Calendar.

You can schedule directly onto the calendar. This is easiest when you are in the **Day, Week** or **Planner** views, because you can highlight the exact time for the activity. However, an activity can be scheduled from any calendar view apart from the **Pegboard.**

To schedule an Activity.

Ensure that the correct contact record is active.
Ensure that you are viewing the correct date.

Left mouse click and hold down the button. Drag from the required start time to the required end time of the activity.



GoldMine automatically defaults to scheduling an appointment.

Enter the remaining required data and select **Schedule.**

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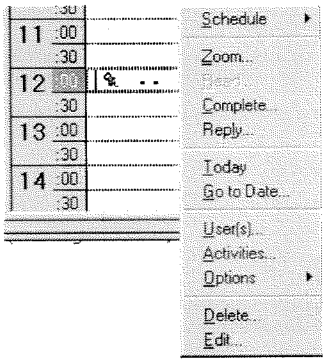
Completing Activities

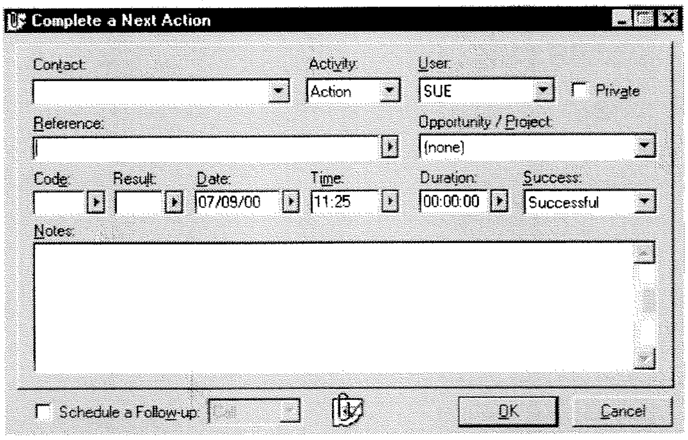
It is very important to complete activities in order to indicate that the action has been carried out. Activities remain Pending on the Calendar until they are completed.
The simplest method is to remember that whenever you can see a scheduled activity, you can complete it.

To Complete a Scheduled Activity.

Highlight the activity to be completed. Right mouse click and select **Complete.**



This should then bring up the standard **Completion Box** as shown below.



Any notes to do with the completion of the activity can then be added here.

When complete, press **OK.**

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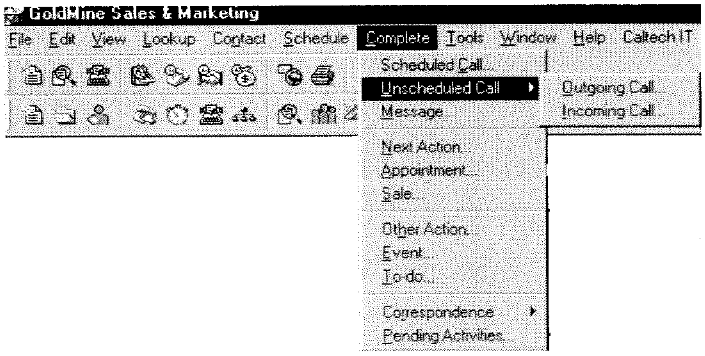
Contact - Name of the main contact or additional contact, if selected.
User - Name of the user who carried out the activity. This field defaults to your user name.
Activity - This field carries over the Activity Type selected when it was scheduled.
Reference - The Reference field caries over the Reference entered when it was scheduled.

Code - This field defaults to the code entered when it was scheduled.
Result - Assigns the activity's completion code. This code is useful for segmenting activities for reports.
Date - The date the activity was carried out. This field defaults to the current date.
Duration - Use this field to enter the amount of time spent on the activity.
Notes - Stores the details of specific activities. This area will prove useful when browsing through the history of previous activities.
Successful/Unsuccessful - Used predominantly for calls and sales to show whether verbal contact was made with the intended person.
Sale Amount - Use to enter amount of sale (record as a Closed Sale or a Lost Sale).

Completing an Unscheduled Activity.

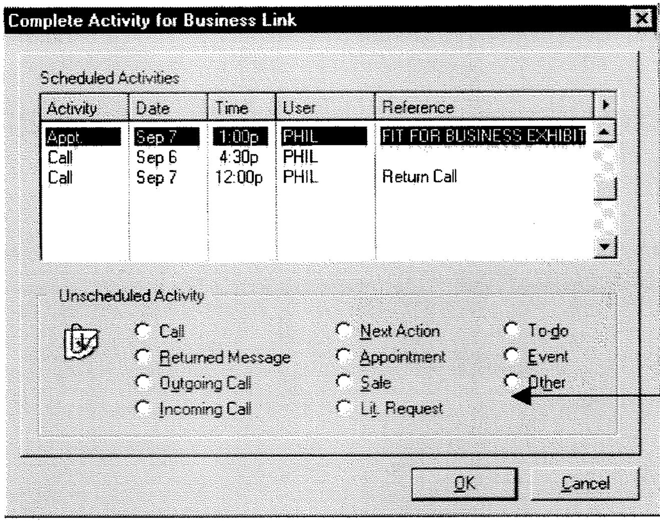
Find the correct contact record.

Select Complete>>Unscheduled Call>>Outgoing or**>>Incoming**



This will bring up the standard completion box for you to fill in, as before.

If the activity is not a call, select **Complete>>Pending Activities**



Select the correct activity type from the bottom radio buttons

Click on **OK**.

Radio Buttons

Enter the details of the activity in the completion window the same way as you would for a scheduled activity.

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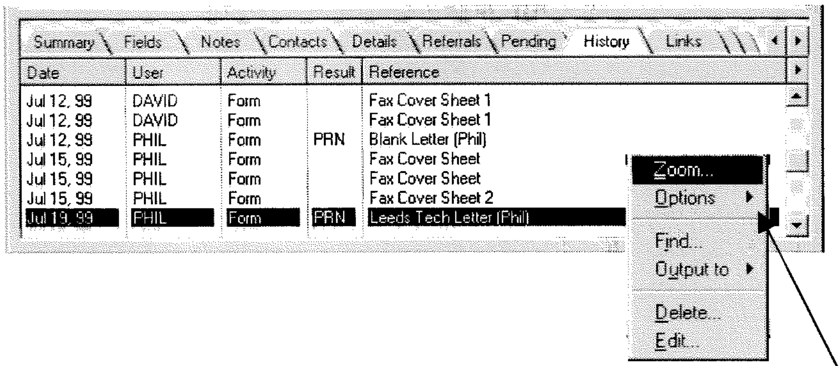
Viewing Completed Activities.

The **History** tab shows everything that has happened with a particular contact record. GoldMine automatically updates the tab with the history of the completed activities, merger form documents, referrals etc.



Zoom allows you to zoom into the particular activity to see all available information.

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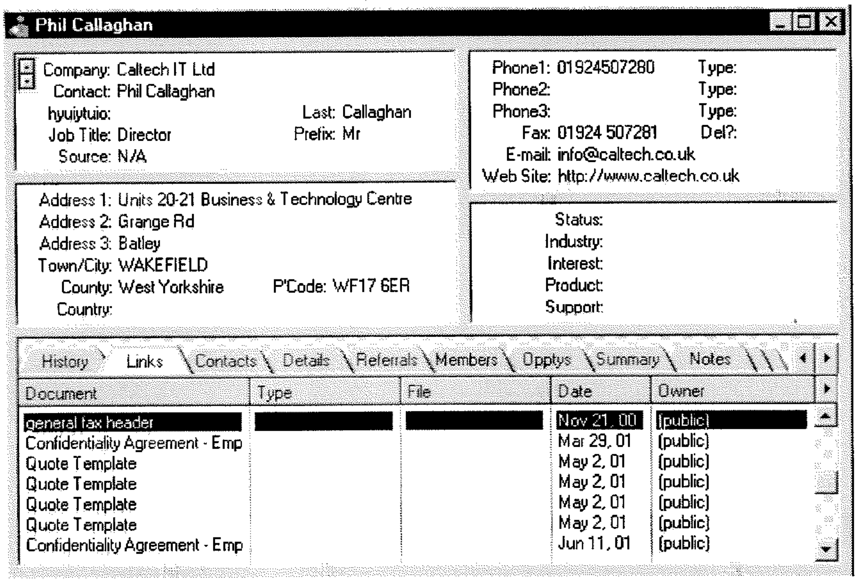
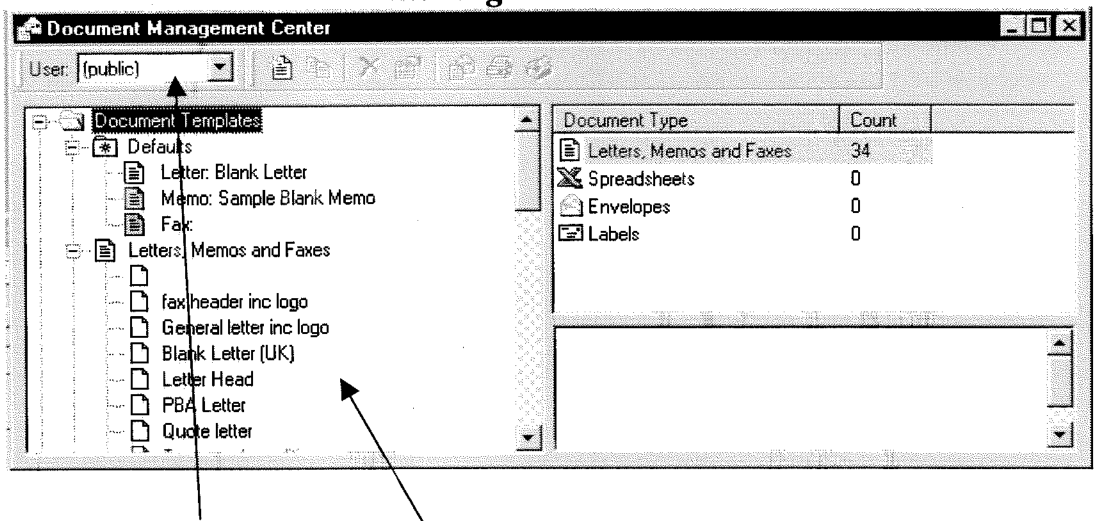
Sending a letter within GoldMine.

Before you begin, ensure that you have the correct contact record open in GoldMine.

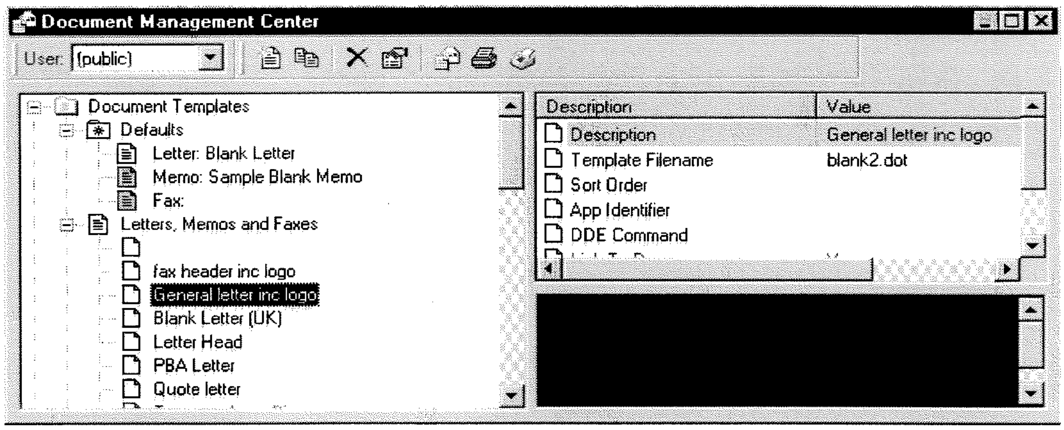


From the GoldMine menu bar select '**Contact**' and then select '**Write**' from the drop down list. From the second drop down list select '**Customise Templates**'. This will open the '**Document Management Centre**'.



Select the appropriate user under which you created your template.

This will then display a list of all templates created under that user name.



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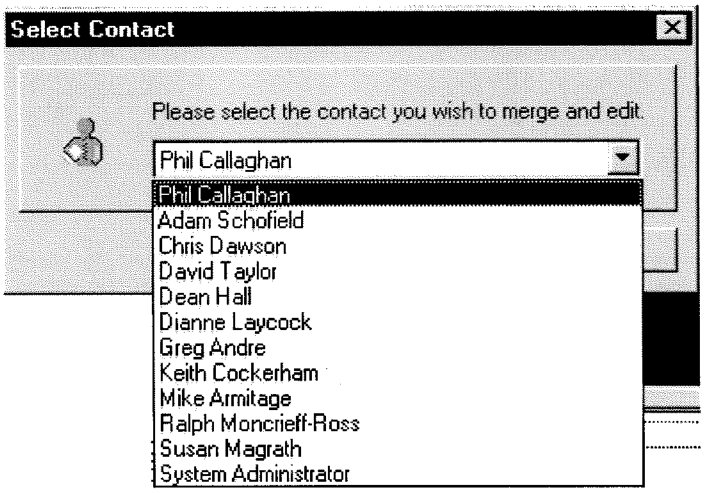
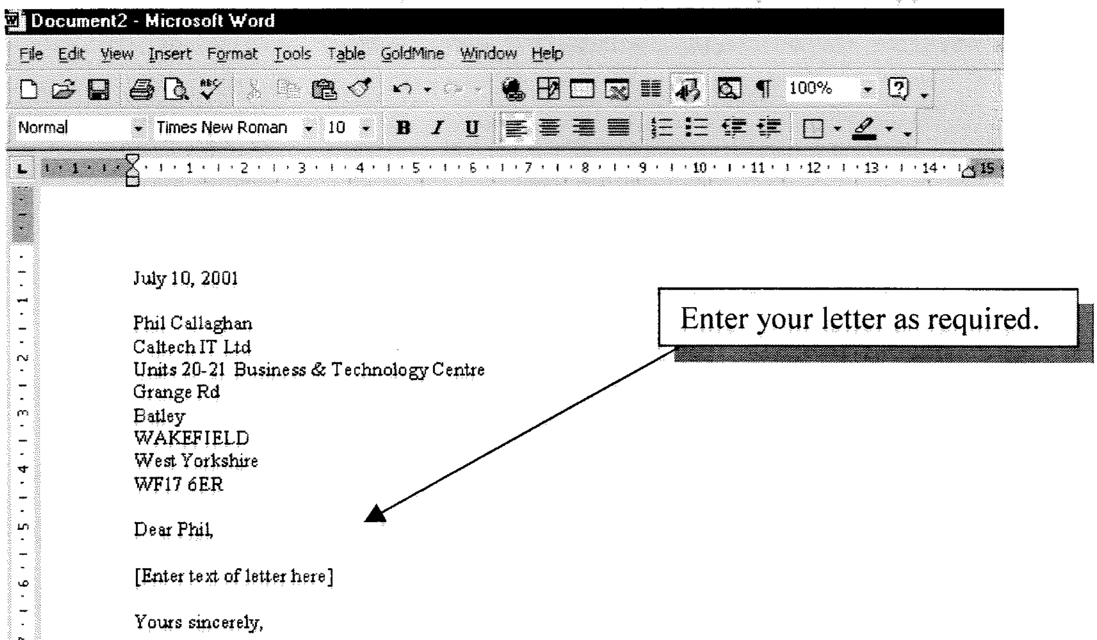
If there is more than one contact for the company, the '**Select Contact**' box will appear. From the drop down box select the person to whom you wish to send the letter.



Once you have selected the correct contact, click '**OK**'

GoldMine will then automatically launch Word and your template will appear on screen.



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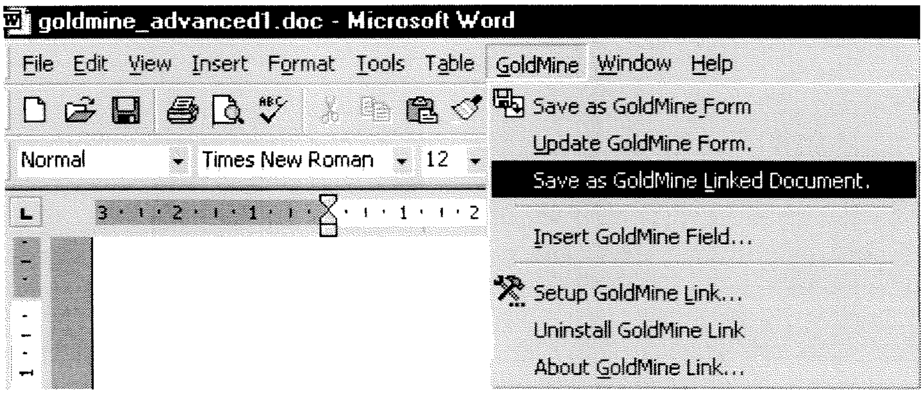
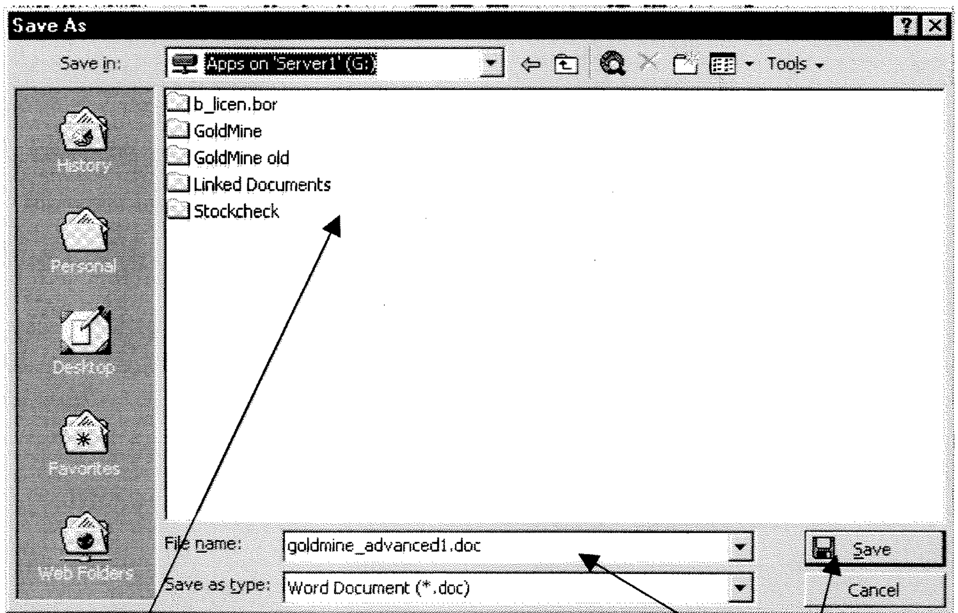
To save your document, select GoldMine from the Menu bar and select '**Save as GoldMine Linked Document**' from the drop down list.



The '**Save As**' screen will appear, enabling you to locate the correct directory to save your document to.

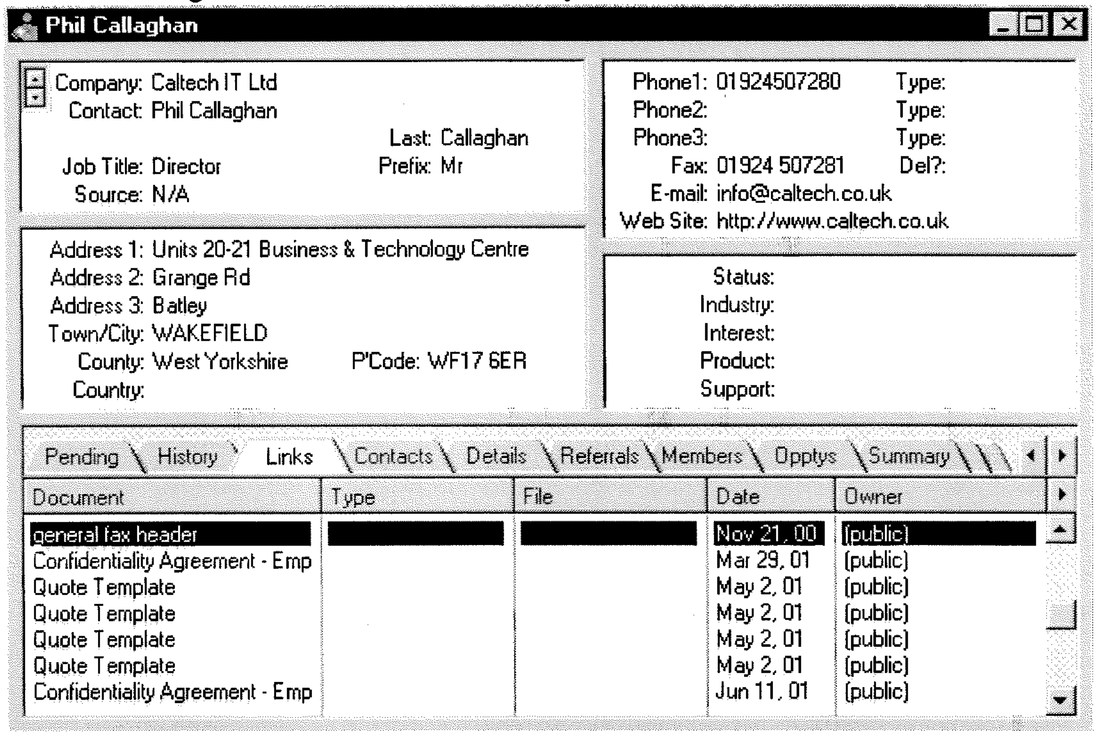
ALWAYS save to the Server where GoldMine in located.



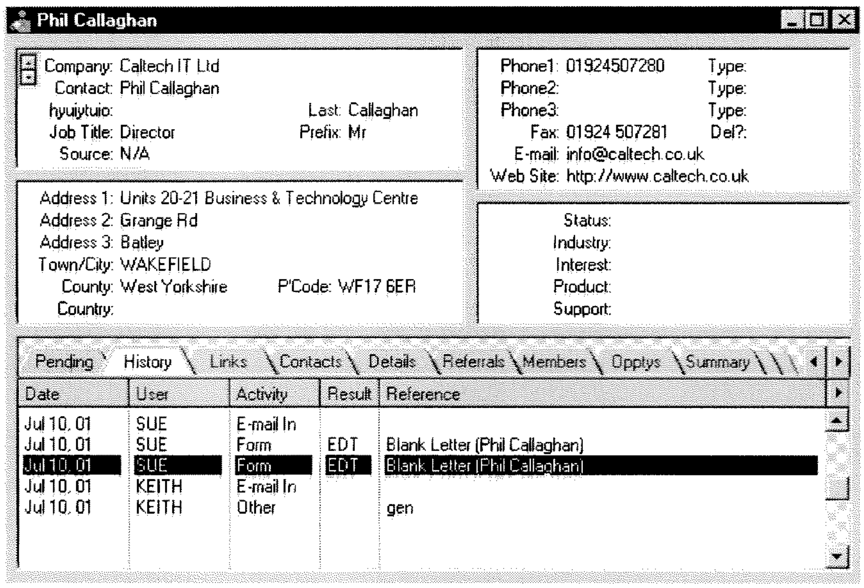
Select the correct '**Linked Documents**' directory.

Once you have located the correct directory, give the file an appropriate name and click on '**Save**'.

The document will now have been saved and stored under the '**Links**' tab in GoldMine. Double clicking on the link will automatically launch the document.



A record will also be kept under the '**History**' tab, showing whom it was sent by and when.



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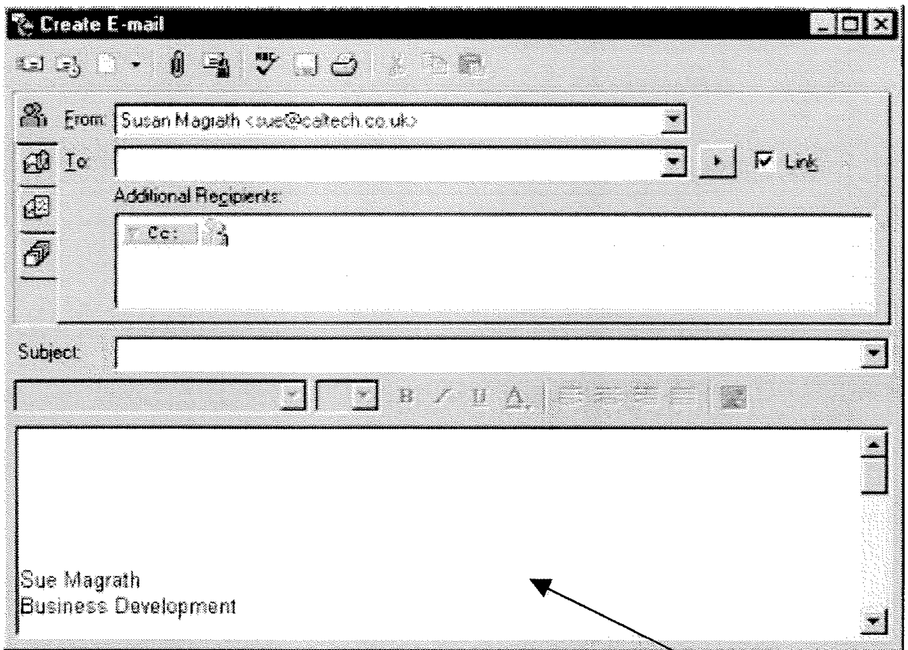
Sending an e-mail through GoldMine

Before sending e-mail you must ensure that the correct contact record is open with GoldMine.

From the Main menu bar select the **'Send Internet E-mail'** icon.

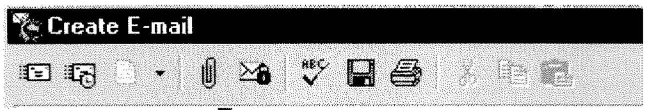
Upon selecting this, the following **'Create E-mail'** screen will appear.



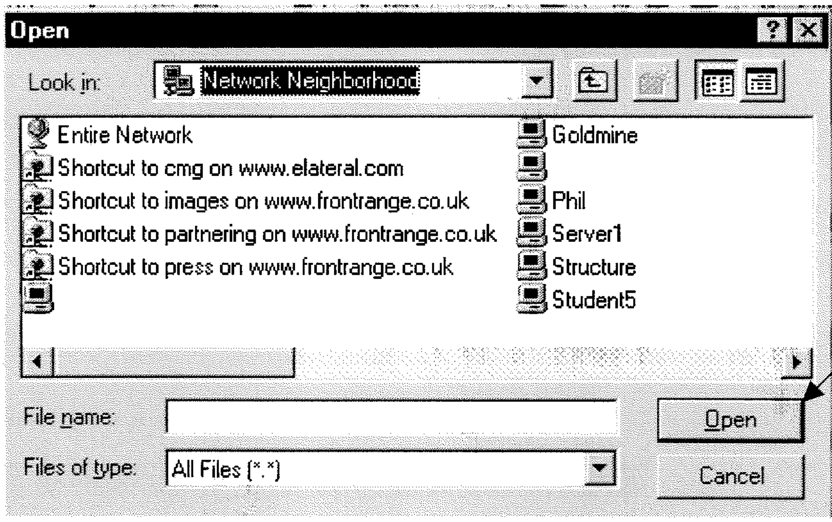
Selecting the tick box, ensure that the e-mail will be linked to the contact record.

Enter the body of your e-mail here.

To attach a document to e-mail

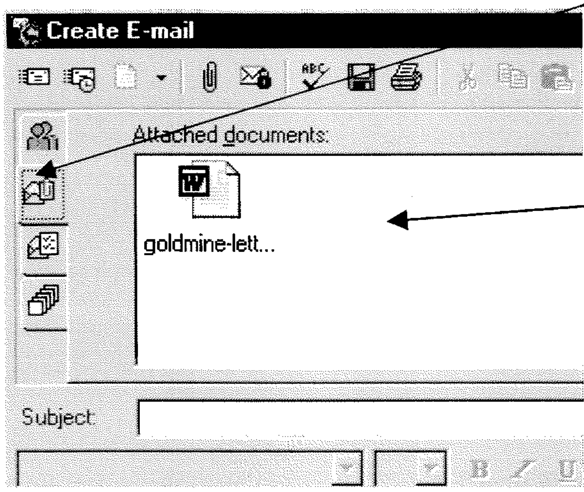


Click on the '**Attach Files**' icon. This will bring up the '**Open**' dialog box, from which you can find the required documents to attach.



Once you have found the correct documents, highlight them and click on '**Open**'.

Once you have attached the documents, clicking on the **'Attachments'** tab in the **'Create an E-mail'** screen will show you similar to that below.



Documents selected as attachments will show here.

Once you have selected the correct documents and are ready to send the e-mail, you can then click on **'Send'**.

Your e-mail will now be sent to the specified address.