

## What our customers had to say:

"I have learnt a great deal today. I look forward to going back to the office tomorrow to use the Software " **Haynes Publishing**

"Excellent course (content and trainer). Addressed all the points I was told it would in more detail and more clearly than I thought would be possible. All in all, well worth the time" **The Jelf Group**

"This was a very good course and met my objectives" **Renishaw Plc**

"Very informative and well run" **Lloyds TSB Autolease**

- On line training
- Classroom training
- On site training
- Real time training



### Aim

To ensure that users have an adequate understanding of the day to day basic functions of using GoldMine as a sales and client management tool to improve their productivity. The course is very much 'hands on' with plenty of real life exercises.

### Pre-requisites

Attendees should already have a working knowledge of Windows and Windows applications like Word or any Database system.

### Duration

Course is normally one full day - start time is 10.00am and we aim to finish around 4.30pm. Refreshments, provided throughout the day, and buffet lunch is included (If the course is held at the Wizard Systems Training Centre).

### Why choose Wizard Systems?

- Training providers since 1993
- Courses are friendly, informal and run in small groups
- Plenty of hands on experience and exercises
- In training surveys 100% of attendees said they would recommend our training to others

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## Agenda

### Overview and Introduction to GoldMine

#### Layout of the GoldMine screens

- The Tool Bar
- GoldMine Objects
- The Tab Bar, user defined Fields, Contacts, Profiles, GM+View, Referrals, Pending, History and Links

#### Finding Information

- Quick searches by Company Name, Contact Name etc...
- Windows Shortcuts, Ctrl-PgUp etc...
- Contact Listing Options
- Query/Search options

#### Entering New Contact Records

- GoldMine Lookup Tables
- Entering Additional Contacts
- Entering Detail Records
- Creating Referral Records

#### Activities

- Scheduling a Call Back
- Scheduling an Appointment through the Calendar
- Scheduling a Literature request
- The Activity List and its options
- The Calendar and its options
- Completing Activities
- Email
- Sales Forecasting/Tracking

#### Correspondence

- Printing a Letter using the Word link

#### Database Subsets

- Creating simple queries and filters

#### Reports

- Printing Phone Lists, Contact Lists and Activity Lists

#### User Preferences

- An overview of User Preferences
- Calendar Holidays

#### GoldMine Knowledgebase

- Knowledgebase
- Personal base
- Creating topics
- Searching for information or text

