

## 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**

"Good course, was very helpful" **Gasworld**

"Very good Training course and presentation" **Securicor Wireless Technology**

"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 some of the more advanced functions of GoldMine as a Workgroup Contact Manager – i.e. Querying, Creating Word Processing Templates, Using the Organisation Tree, Analysis and Statistics etc...

### Pre-requisites

Students should already have a working knowledge of Windows and should have a good working knowledge of GoldMine.

### 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 of the Basic Features of GoldMine

### Tracking Opportunity/Projects

- Creating and Using the Opportunity and Project Manager

### Preferences in GoldMine

- Amending Your Preferences/Options
- Using & Amending the Toolbar
- Creating simple Macros to save time

### Creating subsets of your database

- Creating a Filter
- Optimising a Filter
- Creating Groups
- When to use a Filter or a Group

### Using the Relationship Tab

- Creating a 'Relationship'
- Adding New Contacts
- Changing/Editing Information

### Additional Features (Optional)

- Record Alerts
- Literature Fulfillment Centre

### Using the Info Centre / Knowledgebase

- Finding Information
- Adding New Topics
- Attaching Files

### Word Processing

- Creating Templates for Letters, Faxes & Forms
- Carrying Out a Mailing Campaign

### Analysis

- Statistical Analysis
- Graphical Analysis
- Forecast Analysis
- Leads Analysis

### Reports

- Report Options
- Creating New Reports & Cloning
- Basic Expressions
- Query/Search options

