



Consistently  
providing  
Quality

Solutions in accounting, sales & marketing, service & support & networking

• Design • Implementation • Support



## Advanced User Training - Course Agenda

### Configure Goldmine

Custom Fields Basics - Change Field Labels, Create entries for F2 Lookups,  
Details - Create detail fields  
Record Alerts - Swap and convert contact records

### Communication Management

Manage the Document Management Centre - Create templates & Use default templates  
Manage the E-mail Centre - Create a Literature Fulfillment Centre

### Create Subsets of Data - Goldmine Contact Search Center, Filters and Groups

Tag Records - Two methods of tagging records & Using Tagged records to create Groups  
Create Filters - Simple and Advanced - Using Boolean Expressions & Create a Filter in the  
Search Centre  
Create Groups - Simple and Advanced

### Manage Your Data

Globally replace data  
Realign territories  
Merge purge and export Data  
Export Data - Copy and Move Contacts to other Goldmine databases

### Manage Sales

Opportunity and Project management  
Sales Quotas and Forecasts  
Analyse Goldmine Data

### Reporting

Goldmine's Standard Reports  
Create a New Report  
Format a Report  
Report Fields  
Report Filters

### What's New in Goldmine 6.6?

Review new features in Goldmine 6.6 - Lead Management Centre, Campaign Management  
Centre & Web Import Wizard