



















Miscellaneous

-  Set personal preferences in GoldMine
-  Open another Contact Set
-  Log in another user
-  Log away
-  Display Personal Rolodex **F11**
-  Display program information
-  List Help topics **F1**
-  Exit GoldMine **ALT+F4**

Using the E-mail Center Toolbar

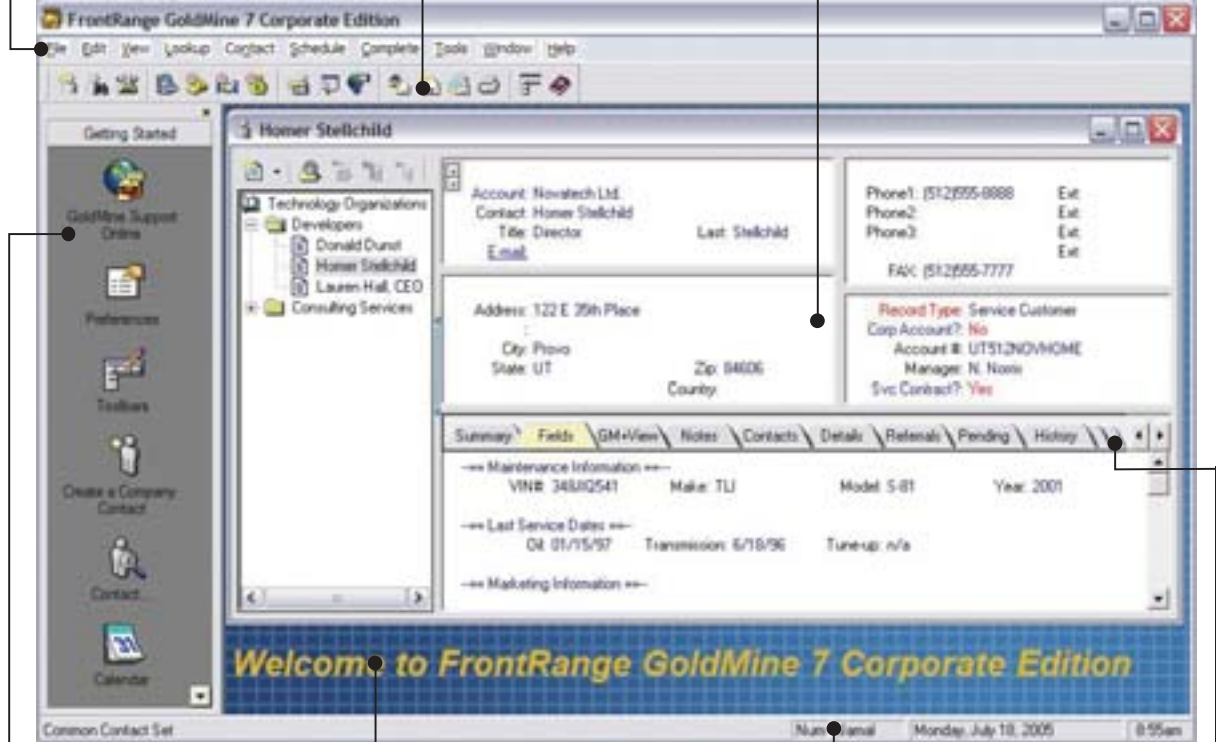
-  Create a new e-mail message
-  Open selected message
-  Delete selected message
-  Mark message as read
-  Fast file
-  File it
-  Redirect the message
-  Set up e-mail rules
-  Set up distribution lists
-  Customize e-mail templates

The GoldMine 7.0 Corporate Edition Main Window

Main Menu: Contains commands to perform daily operations

Toolbar: Provides a quick way to execute specific commands

Contact Record: Centralizes the information about individuals or companies with whom you interact



Taskbar: Provides frequently used commands, documents and macros in one convenient location

Customizable Background: Configures to display your organization's logo, background graphic and text

Status Bar: Displays the open database, status of Num Lock and Caps Lock, user name, date and time

Tab Bar: Presents detailed information about a Contact Record

GoldMine® Corporate Edition



BUTTONS AND SHORTCUTS

Working with the Contact Record

- Create a contact record **CTRL+N**
- View another record in a new window
- Dial the contact's telephone number **ALT+1**
- Insert a note for this contact record **CTRL+I**
- Start the timer / stop the timer **F8/SHIFT+F8**
- Reset timer **ALT+F8**
- Restart timer **CTRL+F8**
- Time incoming call
- Edit contact's record **CTRL+E**
- Add a note **CTRL+I**
- Search for a term (within a record) **F3**
- Next/previous record **PgDn/PgUp**
- First/last record **CTRL+PgUp/PgDn**

Searching

- Open and close the Org Chart **CTRL+Q**
- Create and activate a group of contacts
- Create and activate a filtered subset of contacts
- Search in all fields
- Search details
- Open the Contact Search Center

Using the Contact Search Center Toolbar

- Power/simple search options
- Save a power search
- Hide/view saved searches
- Output to printer
- Sync contact
- Shrink Contact Search Center
- Contact Search Center preferences
- Browser columns
- Preview
- Activate filter
- Release filter
- Edit search
- Delete filter
- Search additional contacts **ALT+O**

Scheduling, Viewing, and Completing Activities

- Schedule a call
- Schedule a next action
- Schedule an appointment
- Schedule a forecasted sale
- Schedule a to-do
- View your Activity List **F6**
- Complete an activity
- View your Calendar **F7**

Using the Calendar Toolbar

- Schedule an activity
- Complete an activity
- Zoom in on an activity
- Previous
- Today
- Next
- Go to date
- Select activities
- Delete
- Edit selected activity

Communicating with Contacts

- Open the E-mail Center **F5**
- Send Internet e-mail **CTRL+SHIFT+E**
- Get waiting Internet e-mail
- Open the Document Management Center

Working with the GoldMine® Team

- Send a telephone message
- Send a pager message
- Send GoldMine e-mail
- View the InfoCenter®

Managing Sales

- Schedule a forecasted sale
- Display statistical analysis of activities
- Display sales quota analysis
- Display leads analysis
- View projects and opportunities **F9**

Automated Processes™

- Attach an Automated Process
- Design and maintain tracks
- Scan tracks and process triggered events

Designing Reports

- Design, generate or print a report **CTRL+P**
- Set report filter
- Center object **ALT+C**
- Change text font **ALT+F10**
- Align text within object **CTRL+P**
- Specify outline properties **CTRL+O**
- Select a background **CTRL+B**
- Edit a field expression **CTRL+F**
- Edit a filter **CTRL+F6**
- Insert section label **F6**
- Insert text label **F9**

- Insert data field **F2**
- Insert expression field **F3**
- Insert system field **F4**
- Insert dialog field **F5**
- Insert line **CTRL+F9**
- Insert picture from file **ALT+F8**
- Insert picture from clipboard **ALT+F7**
- Insert duplicate field **ALT+F5**
- Create dialog field **CTRL+R**
- Edit dialog field **CTRL+M**
- Delete dialog field **CTRL+D**
- Define margins, ruler, and date format **F7**
- Define a filter **CTRL+F7**
- Save/update template **F10**
- Save template under a new file name **SHIFT+F10**
- Set up the printer **SHIFT+F8**

Managing Databases

- Import data with the Import Wizard
- Export data with the Export Wizard
- Replace or update fields with the Global Replace Wizard
- Merge/purge duplicate records
- Delete the current contact record
- Globally delete records

Customizing GoldMine

- Add, edit and delete users
- Create user groups; add and delete members
- Create resources and view resource schedules
- Create custom screens
- Create, edit or delete a custom field
- Place a field on a screen
- Rebuild the database to include new fields placed on screen
- Delete field from screen
- Exit Screen Designer
- Field properties
- Create and edit branching scripts
- Create macro
- Edit macro

Maintaining GoldMine

- Create and rehost database files
- Perform data indexing maintenance

Synchronizing

- Open the GoldSync® Administration Center
- Sync between GoldMine sites
- Sync with Microsoft® Outlook®
- Sync with Palm™/Visor®
- Sync with Pocket PC