

# GoldMine Training System Administration – 3 Day



## Get more out of your GoldMine CRM solution!



Ticomix, Inc. is offering an instructor-led training designed to make your staff as productive as possible. What can you learn with us? Listed below is a syllabus for learning about critical aspects of GoldMine. Ticomix offers public training classes as well as on-site customized training.

### Course Objectives:

The GoldMine training will be approached from the perspective of an Administrator. The skills to effectively navigate throughout GoldMine 6.x will be covered as well as the Administrator features including customization and maintenance. The management tools that come with GoldMine will also be discussed.

### Student Profile and Prerequisites:

This course is designed for GoldMine Administrators/Users currently using the product and will be responsible for designing and maintaining their GoldMine installation. They should have administrative knowledge of Microsoft Windows® operating system and a general understanding of what GoldMine does.

## GoldMine 6.6 System Administration Syllabus – 3 Day

### Setting Up Goldmine Users

- Goldmine Users
- Adding A New User
- Record Ownership And Curtaining

### Setting Access Rights

- User Groups
- Creating A User Template

### User Preferences

- User Preferences
- Appearance And Behavior
- Calendar And Scheduling

### Using The Infocenter

- The Infocenter
- Navigating The Infocenter
- Working With The Infocenter
- Attaching A File
- Making A Table Of Contents
- Searching The Infocenter
- Infocenter Import/Export
- Record Alerts

### Synchronization

- Synchronization
- Transferring Contacts Between Contact Sets
- Creating & Retrieving a Transfer Set
- Notebook Synchronization
- On The Network
- On The Notebook
- Internet Sync
- Palm/Visor Synchronization
- Outlook Synchronization

- Pocket PC Synchronization

### Customizing Goldmine

- Expanded Detail Records
- Setting Up Detail Tabs & Field Labels
- Custom Screens
- Creating A Custom Screen
- Defining And Placing Fields
- Editing In Your Custom Screen

### Customizing Toolbars

- Customizing Toolbars
- Creating A New Toolbar
- Working With Toolbar Icons
- Recording A Toolbar Macro
- Deleting A Toolbar Macro
- Toolbar Preferences

### The Background

- The Background
- Modifying The Background
- Adding A Logo
- Adding Background Text

### The Taskbar

- The Taskbar & Task Items
- Task Groups
- Taskbar Options

### Automated Processes

- Automated Processes Explained
- Defining And Creating A Track
- Attaching Tracks To Contacts
- Executing A Track
- Editing A Track
- Using History To Schedule An Activity

- Using History To Schedule Followup Call
- Adding A Branch
- Removing A Track

### Data Maintenance

- Indexing/Packing
- Backup & Restore
- The Merge/Purge Wizard
- Merging Visible Records
- Global Replace
- Territory Realignment
- Goldmine System Logs

### Importing And Exporting

- File Formats
- Exporting ASCII Delimited & DBF Files
- Creating An Import Profile

### Telemarketing Scripts

- Branching Scripts
- Using & Creating Branching Scripts
- Running Your New Branching Script

### The License Manager

- The Goldmine License Manager & Types
- A Licensing Scenario
- Creating Site License & Undocked Users

### HTML Features

- HTML Features
- The GM+View Tab
  - Enabling IFRAMES
  - Creating GM+View Tab Templates

### My GoldMine

- Customizing The My GoldMine Window
- Adding Resources

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