

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 Description:

The GoldMine training will be approached from the perspective of a beginning end-user. The skills to effectively navigate throughout GoldMine will be covered as well as the basic features including adding and changing records, calendar, filters, correspondence, e-mail and reports tools of GoldMine.

Student Profile and Prerequisites:

This course is designed for GoldMine Users who are just starting to use the product and will be responsible for sales marketing and other customer contact. They should have basic knowledge of Microsoft Windows® operating system, use of the mouse, MS Word® and e-mail.

GoldMine Introduction Syllabus

Getting Acquainted

- Launching Goldmine
- Goldmine's Look And Feel
- Getting Help

Adding Records

- Creating A New Contact
- Lookup Windows
- Adding A Lookup Entry
- Editing A Lookup Entry
- The Zip Code Database
- The Tab Bar
- Duplicate Records

Finding Contacts

- Moving Around
- The Contact Search Center
- Sorting Contacts
- Text Search

Correspondence

- Merging A Letter In Word
- Document Links

Contact Maintenance

- Editing Contacts
- Additional Contacts
- Detail Records
- Finding Detail Records
- Deleting Contacts
- Adding A Note
- Searching Notes

Calendars

- The Calendar
- Resizing The Calendar
- Displaying Completed Activities
- Calendar Outline View
- The Activity List

Before The Call

- The Opportunity/Project Manager
- The InfoCenter
- The Phone Call
- Completing The Call
- My GoldMine

Scheduling

- Scheduling A Call
- Setting An Alarm
- Scheduling An Appointment
- Scheduling From The Calendar
- Completing An Appointment
- Scheduling A Forecasted Sale

Introduction To Filters

- Using Filters
- Creating A Filter
- Contact Search Center Filters
- Creating An Activity Filter
- Record Tagging

Ticomix, Inc

866. 842. 6649 voice

815. 636. 1480 fax

www.ticomix.com