

## GOLDMINE® PUBLIC CLASS SYLLABUS INTRODUCTORY CLASS

This class will provide you with the basics to help you navigate through GoldMine. We will briefly cover the meanings of each icon and the programs functions and features. There will be time throughout each class for questions and answers.

**4-hour FAST classes are held Tuesdays** - See our website ([www.publishorperish.net](http://www.publishorperish.net)) for information on the next available class.

- » **Screen Areas and Main Menu** - You will become familiarized with the general layout of GoldMine.
- » **Contact Records** - Create, edit and delete contact records - learn shortcuts in editing records.
- » **F2 Lookups** - Customize this very handy feature for frequently used entries such as order entry codes. This option can be security set so it can enforce user input and it will allow for standardization of your data.
- » **Online Help** - Use GoldMine's Online Help Program
- » **Manage Activities** - Scheduling appointments, call, events, to-do's and completing them.
- » **GoldMine Inter-office Email** - Send E-mail inter-office to one or several other GoldMine Users.
- » **Connecting to the internet** - Configure GoldMine to get your E-mail and send alpha pager messages as well as link to Outlook\*
- » **Phone messages** - Take messages for other users and posting your availability for other GoldMine users to schedule appointments for you.
- » **Access Rights** - Introduction to customizing what other users see in GoldMine.
- » **Calendar** - Schedule appointments for yourself and other GoldMine users, customize the Calendar's settings and learn all the shortcuts so using the Calendar will be a breeze!
- » **Field editing** - You can customize GoldMine to collect data that is important to you. With this function you will be able to utilize your database more efficiently.
- » **Merge Forms** - Create personalized professional documents and Faxes by using GoldMine's form merge function that allows you to address each letter and fax without re-entering the Contact's name and address.
- » **Document Management** - Link and track which documents were sent to whom and when.
- » **Toolbars** - Use one of the many toolbars that come packaged with GoldMine.
- » **Printing** - Basic Printing tasks
- » **Filters** - Basics of Filters and Groups
- » **Preferences** - Configure GoldMine's settings for the Internet/Calendar/Modem/Visuals/etc.
- » **Scripting** - Basics of scripting such as telemarketing scripts
- » **Maintenance** - Basic maintenance of the databases

**Four-hour FAST class:                      One person - \$225.00                      additional attendees - \$200.00**

***Microsoft Windows and Word knowledge is required.***

\*\*\* Sign in starts at 9:15 a.m. Class begins at 9:30 and ends at 1:30 p.m. \*\*\*

## GOLDMINE® PUBLIC CLASS SYLLABUS INTERMEDIATE CLASS

Our Intermediate class teaches you how to utilize the more complex functions of GoldMine. You will learn how to construct filters, run simple reports, synchronize databases. Our Class is held alternate Wednesdays, see our website ([www.publishorperish.com](http://www.publishorperish.com)) for information on the next available class.

- » **Filters** - Build more complex Filters and Groups. This will be useful for running reports, mailings, mass faxes and letters
- » **InfoCenter**- This is the "intranet" for your office. We use ours to post our pricing, reference sheets and our phone extension directory. You can use the InfoCenter for anything that you want to collectively share with other GoldMine users.
- » **Toolbars** - Create your own toolbars
- » **Macros** - Record macros and install them on your toolbar
- » **Synchronization** - Set up GoldMine to sync your remote User's data and documents with the network.
- » **Report writing** - Use GoldMine's built in report writer to create reports, mailing labels, etc. as well as creating templates to merge data to such as a fax cover sheet.
- » **Create Graphs** - Make pie charts, bar graphs and line graphs of your data
- » **Opportunity Manager** - Track and forecast projects and sales involving more than one User and/or Contact
- » **Print** - Print reports, mailing labels - even your calendar!
- » **Scripting** - Advanced telemarketing scripts
- » **Organizational trees** - Link several different contacts together in the Organizational tree
- » **Email and Merge Template creation** - Create Templates in a word processor program. We will use Microsoft Word as an example.
- » **Advanced Field Creation** - Create different views for your fields

One person - \$176.00

additional attendees - \$126.00

***A basic knowledge of GoldMine is necessary to follow and understand this class. \*\*\****

*Sign in for class starts at 9:15 a.m.*

## GOLDMINE® PUBLIC CLASS SYLLABUS ADVANCED CLASS

This class is the 'anything you want to know about GoldMine' class. We will also cover the Infocenter, creating more complex reports and graphs. Network administration for maintenance and configuration will be discussed. Come to class prepared for our Q&A with any question that you may have. This class is held every alternate Wednesday unless otherwise noted - see our website ([www.publishorperish.com](http://www.publishorperish.com)) for information on the next available class.

- » **Advanced Opportunity Manager** - Use automated processes such as a follow-up letter after an appointment, schedule a follow-up call, etc.
- » **Automated Processes** - Schedule a follow-up letter, email and a phone call back all at once without re-entering any data
- » **Global replacement** - Globally replace fields, macros, etc. on everyone's machine without re-entering the data more than once.
- » **Network Administration** - Advanced Database Maintenance
- » **Database Creation** - Create new databases as well as convert existing ones
- » **Configure a New User**
- » **License Manager** - Undock and upgrade Users
- » **GoldMine** Utilities and security
- » **Troubleshooting** - Troubleshoot GoldMine errors
- » **GoldSync** - Basics of GoldSync Maintenance
- » **Report Writing** - Create your own reports
- » **Merge/Purge** - Clean up old data with Merge/Purge

One person - \$226.00

additional attendees - \$160.00

***A good working knowledge of GoldMine is recommended to participate in this class because of the complexity of its contents.***

*Sign in for class starts at 1:15 p.m.*

The Intermediate and advanced classes are held on the same day. The Intermediate starts at 9:30 a.m. and ends at 12:30 p.m. The Advanced class begins at 1:15 p.m. and ends at 4:45 p.m. (approx.)

**Take Intermediate and Advanced classes on the same day  
and SAVE \$75.00 AND \$50.00 for each additional student!!!**