

Agenda for GoldMine Weekly Webinars

Presented by: Charlie Butler

Week One

Top 10 Issues and Their Resolution - Level I (45 min)

- Issues Opening GoldMine
- Issues in Document Management Center
- Issues with E-Mail
- Issues with Preferences
- Issues with Permissions
- Issue with Help

Q&A (15 Min)

Week Two

Hidden .ini settings and their meanings – Level II (45 min)

- Colors with Codes
- Settings in GM.ini
- Settings in Username.ini

Q&A (15 Min)

Week Three

Best Practices for Training Users - Level I (45 min)

- Preparation
- Handouts and other documentation
- The classroom or Web Environment
- Attendee Participation
- Pace
- Hands On Practice
- Review after each concept
- Immediate use after training
- Refreshers

Q&A (15 Min)

Week Four

Free Third Party Products - Level I (45 min)

- Beyond Gold (from D-J Hunt)
- Linkdocs (from Prior Analytics)
- INI Editor (from Prior Analytics)

Q&A (15 Min)

Week Five

Participants' Best Uses of GoldMine - Level I (45 min)

- Volunteer Participants present their GoldMine
- Presenter discusses his/her best practices
- Discussion and Comment by Group on ways to make it even better

Q&A (15 Min)

Week Six

GoldMine Basics - Level I (45 min)

- Overview of Goldmine
- The Goldmine Window
- The Menu Bar, The Toolbar, and The Taskbar
- The Tabs
- Using Help

Q&A (15 Min)

Week Seven

Working with Contact Records - Level I (45 min)

- Finding Contacts
- Editing Contacts
- View Multiple Contacts
- Creating a Contact
- Deleting a Contact

Q&A (15 Min)

Week Eight

Scheduling/Completing Activities - Level I (45 min)

- Scheduling Calls/Appointment/Next Action/To-Do
- Completing Activities
- Scheduling Recurring Activities
- Scheduling Events
- Scheduling and Completing Activities using the Goldmine Calendar

Q&A (15 Min)

Week Nine

Filters and Groups - Level I (45 min)

- Creating Simple Filters
- Creating Complex Filters
- Creating Groups
- Using Filters and Groups together

Q&A (15 Min)

Week Ten

Filters and Groups - Level II (45 min)

- Creating Simple Filters
- Creating Complex Filters
- Creating Groups
- Using Filters and Groups together

Q&A (15 Min)

Week Eleven

GoldMine Reporting - Level I (45 min)

- Using **Output to** for basic reporting and exporting
- Creating a Basic Filter
- Report Categories
- Sample Reports
- Cloning a GoldMine Report

Q&A (15 Min)

Week Twelve

Document Management - Level I (45 min)

- Word Templates
- E-Mail Templates

Q&A (15 Min)

Week Thirteen

Document Management - Level I (45 min)

- Word Templates
- E-Mail Templates

Q&A (15 Min)

Week Fourteen

Database Setup - Level I (45 min)

- When are additional databases appropriate?
- How to create a new dBase database
- How to create a new SQL database
- Creating a new Detail (Details tab)

Q&A (15 Min)

Week Fifteen

Database Setup - Level II (45 min)

- Setting up New Screens
- Setting up New Fields
- Setting up Field Properties

Q&A (15 Min)

Week Sixteen

Review of Other GoldMine Tabs - Level I (45 min)

- Contact and Referral Tabs
- Links and Members Tabs
- Note and other Tabs
- Arranging Tabs

Q&A (15 Min)

Week Seventeen

Lookup Lists and Lookup.ini - Level I (45 min)

- Creating, Modifying and Controlling Lookup Lists
- Uses for Lookup.ini

Q&A (15 Min)

Week Eighteen

Record Typing - Level II (45 min)

- What is Record Typing?
- How is it useful?
- How to set up Record Typing

Q&A (15 Min)

Week Nineteen

Setting User Preferences - Level I (45 min)

- Personal, Record, Calendar, Schedule
- Alarms, Lookup, Toolbar, Internet
- Misc., Speller

Q&A (15 Min)

Week Twenty

User Setup - Level I (45 min)

- Creating a New User
- Setting User Properties
- Setting User Preferences

Q&A (15 Min)

Week Twenty-One

User Setup - Level II (45 min)

- Setting up User Groups
- Setting Record Ownership and Curtaining

Q&A (15 Min)

Week Twenty-Two

Opportunity/Project Manager - Level I (45 min)

- Opportunity Manager Uses
- Opportunity Manager Options
- Project Manager Uses
- Project Manager Options

Q&A (15 Min)

Week Twenty-Three

Campaign/Leads Management - Level I (45 min)

- Campaign Management Center
- Leads Management Center

Q&A (15 Min)

Week Twenty-Four

Creating Reports - Level II (45 min)

- Creating GoldMine Reports
- Understanding GoldMine Tables and Fields
- Other Non-GoldMine Reporting Tools

Q&A (15 Min)

Week Twenty-Five

Organization Chart - Level I (45 min)

- What it is used for
- Main Features and Functions
- Additional Features and Considerations

Q&A (15 Min)

Week Twenty-Six

Other GoldMine Features - Level I (45 min)

- Using the Info Center
- Copying Contact Details
- Using the Personal Rolodex and Internet Searcy

Q&A (15 Min)

Week Twenty-Seven

Database Clean Up - Level I (45 min)

- Finding and dealing with duplicates
- To Merge or Delete that is the question
- Cleaning up data using Global Replace (a little level II here)
- Cleaning up Imported Records

Q&A (15 Min)

Week Twenty-Eight

Database Clean Up - Level II (45 min)

- Merge/Purge the Database
- Importing/Exporting Records
- Archive Database

Q&A (15 Min)

Week Twenty-Nine

SQL Queries - Level I (45 min)

- Creating/Saving Queries
- Running Queries
- Converting Queries to Groups
- Outputting Queries to Excel

Q&A (15 Min)

Week Thirty

SQL Queries - Level II (45 min)

- Creating Advanced Queries
- Running Queries in SQL
- Using SQL to Delete GoldMine items
- Using Queries to force full Record Sync'ing

Q&A (15 Min)

Week Thirty-One

Integrating with Outlook and PDAs - Level I (45 min)

- GoldMine's interface with Outlook
- A \$20 add-on for Outlook E-Mail integration
- Sync with a PDA

Q&A (15 Min)

Week Thirty-Two

GM+Views - Level II (45 min)

- Basics of creating GM+Views
- Some Examples of GM+Views

Q&A (15 Min)