



GoldMine Training Classes
Please call for Pricing and Schedules
(503) 345-9176

GoldMine Intermediate - (GM201) 6hrs \$395.00

1. Advanced Filters

Combining Two Filters (Drill Down)
Building Complex Filters
Filter Optimization - Improved Performance

2. Groups

Creating a Group from a Filter
Activating a Group
Search for a Record within a Group
Releasing a Group
Creating a Group from a Previewed Filter
Creating a Group from "Tagged" Records
Creating a Group from a Text Search
Creating a Group from a Detail Record
Creating a Group Based on a Scheduled Activity

3. Advanced Scheduling

Scheduling for Multiple Users
Checking for Available Time
Scheduling a Recurring Activity
Creating Resources
Scheduling (reserving) a Resource
Scheduling to a Group

4. Creating Letter Templates

Customizing an Existing Template
Creating a New Template

5. Editing E-Mail Templates

Default Templates
Modifying / Creating E-mail Templates
Creating a New E-Mail Template
Selecting E-Mail Templates
Sending Bulk E-Mail

6. Literature Fulfillment Center

Scheduling a Literature Request
Fulfilling a Literature Request

7. Opportunity Manager

Opportunity & Project Manager
Entering New Opportunity Manager Information
Adding Tasks to an Opportunity
Additional Options for an Opportunity
The Opportunity Pipeline

8. Info Center

InfoCenter Introduction
Searching the InfoCenter

9. User Preferences

Setting Preferences
Help Information