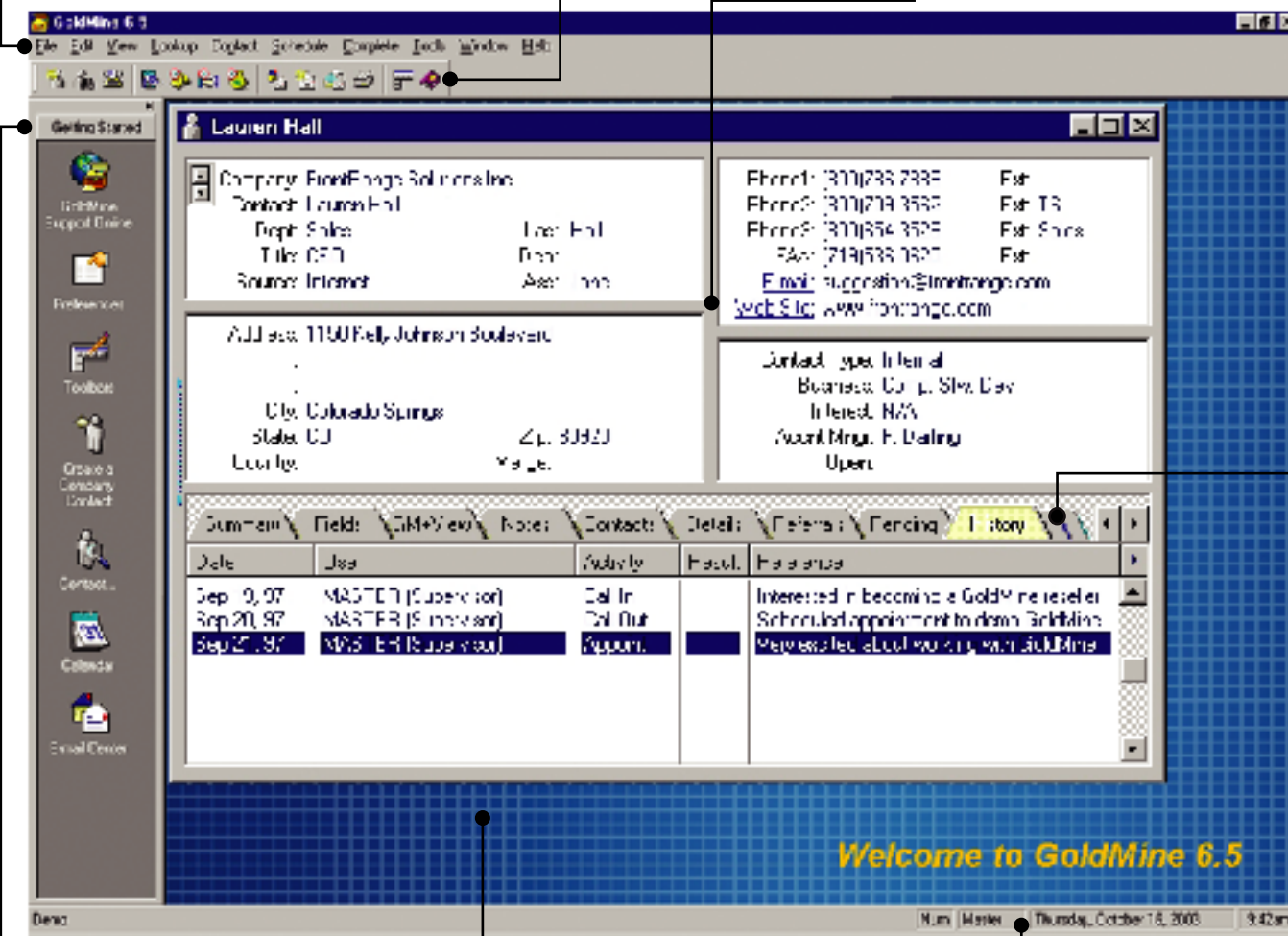


# The GoldMine® 6.5 Main Window

**Main Menu:** contains commands to perform daily operations

**Toolbars:** provide a quick way to execute specific commands

**Contact Record:** the center of all information about individuals with whom you interact



**Taskbar:** provides frequently used commands, documents, web links and macros in one convenient location

**Customizable Background:** provides the ability to display your organization's logo, background graphic, and text

**Status Bar:** displays the open database, status of Num Lock and Caps Lock, user name, date and time

**Tab Bar:** presents detailed information about a contact

- Summary** Automatically generated details on activities scheduled and completed for the contact. (CTRL+S)
- Fields** Customizable screens and fields that your organization uses to store special information for contacts. (CTRL+F)
- GM-View** HTML screens that display graphics, images, GoldMine fields, linked files and content from the Intranet or Internet. (CTRL+V)
- Notes** General information about the contact that might be helpful to working with the individual in a variety of situations. (CTRL+N)
- Contacts** Information about additional contacts at the same organization with whom you interact, other than the primary contact. (CTRL+C)
- Details** Supplemental information about the contact that GoldMine can search quickly. (CTRL+D)
- Referrals** Two-way associations between the contact and other contact(s) in the open database. (CTRL+R)
- Pending** Upcoming activities for the contact scheduled for you or your team. (CTRL+P)
- History** Completed activities related to the contact logged by you or your team. (CTRL+H)
- Links** Files linked with the contact record, such as documents, images, or applications. (CTRL+L)
- Members** Subsets of contacts (groups) that include the contact. (CTRL+M)
- Tracks** Automated Processes™ tracks that GoldMine evaluates to perform a series of instructional events attached to the contact record. (CTRL+T)
- Opptys** Open sales opportunities that are related to the contact. (CTRL+Y)
- Projects** Long-term projects that are related to the contact. (CTRL+J)
- Tickets** HEAT® Service & Support™ call log information related to the contact. (Option available with GoldMine Corporate Edition only) (CTRL+K)



QUICK REFERENCE CARD



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# Buttons and Shortcuts

## Working with the Contact Record

- Create a Contact Record
- View another record in a new window
- Dial the contact's telephone number ALT+1
- Insert a note for this contact record CTRL+I
- Start the timer/Stop the Timer F8/SHIFT+F8
- Reset Timer ALT+F8
- Restart Timer CTRL+F8
- Time incoming call
- Edit contact's record CTRL+E
- Add a Note CTRL+I
- Search for a term (within a tab/list window) F3
- Next/Previous Record PgDn/PgUp
- First/Last Record CTRL+PgUp/PgDn

## Searching

- Open the Contact Search Center and begin a query
- Open and close the Org Chart CTRL+Q
- Create and activate personal or public groups of contacts
- Create and activate personal or public subsets of contacts
- Search in all Fields
- Search details

## Scheduling, Viewing, and Completing Activities

- Schedule a call
- Schedule a next action
- Schedule an appointment
- Schedule a forecasted sale
- Schedule a To-Do
- View your Calendar F7
- View your Activity List F6
- View Contact Summary CTRL+S
- View Fields CTRL+F
- View Notes CTRL+N
- View Additional Contacts CTRL+C
- View Details CTRL+D
- View Referrals CTRL+R
- View Pending activities CTRL+P
- View History CTRL+H
- View Linked documents CTRL+L
- View Groups in which a contact is a Member (subset of database) CTRL+M
- View attached Automated Processes CTRL+T
- View linked Opportunities CTRL+Y
- View linked Projects CTRL+J
- Complete an activity

## Communicating with Contacts

- Open the E-mail Center F5
- Send Internet E-mail CTRL+SHIFT+E
- Get waiting Internet E-mail
- Open the Document Management Center to edit, print, or fax documents

## Working with the GoldMine Team

- Send a telephone message
- Send a pager message
- Send GoldMine E-mail
- Display Personal Rolodex F11
- View the InfoCenter

## Managing Sales

- Schedule a forecasted sale
- Display statistical analysis of activities
- Display sales quota analysis
- Display leads analysis
- View projects and opportunities F9

## Automated Processes

- Attach an Automated Process
- Design and maintain tracks
- Scan tracks and process triggered events

## Designing Reports

- Design, generate or print a report
- Set report filter
- Center object ALT+C

- Change text font ALT+F10
- Align text within object CTRL+P
- Specify outline properties CTRL+O
- Select a background CTRL+B
- Edit a field expression CTRL+F
- Edit a filter CTRL+F6
- Insert Section label F6
- Insert Text label F9
- Insert Data field F2
- Insert Expression field F3
- Insert System field F4
- Insert Dialog field F5
- Insert Line CTRL+F9
- Insert Picture from file ALT+F8
- Insert Picture from Clipboard ALT+F7
- Insert Duplicate field ALT+F5
- Create Dialog Field CTRL+R
- Edit Dialog Field CTRL+M
- Delete Dialog Field CTRL+D
- Define margins, ruler, and date format F7
- Define a filter CTRL+F7
- Save/update template F10
- Save template under a new file name SHIFT+F10
- Set up the printer SHIFT+F8

## Managing Databases

- Import data with the Import Wizard
- Export data with the Export Wizard
- Replace or update fields with the Global Replace Wizard
- Merge/purge duplicate records
- Delete the current Contact Record
- Globally delete records

## Customizing GoldMine

- Add, edit and delete users
- Create user groups; add and delete members
- Create resources and view resource schedules
- Create custom screens
- Create, edit or delete a custom field
- Place a field on a screen
- Rebuild the database to include new fields placed on screen
- Delete field from screen
- Exit screen designer
- Field properties
- Create and edit branching scripts
- Create macro
- Edit macro

## Maintaining GoldMine

- Create and rehost database files
- Perform data indexing maintenance

## Synchronizing

- Open the GoldSync Admin Center
- Sync between GoldMine sites
- Sync with Outlook
- Sync with Palm/Visor
- Sync with Pocket PC

## Miscellaneous

- Set personal preferences in GoldMine
- Open another Contact Set
- Log in another user
- Log Away
- Display program information
- List Help topics
- Exit GoldMine ALT+F4

## E-mail Center Toolbar

- Create a new e-mail message
- Open selected message
- Delete selected message
- Mark message as read
- Fast file
- File it
- Redirect the message
- Set up e-mail rules
- Set up distribution lists
- Customize e-mail templates

