

GoldMine® 5.0

VERSION 5.5

GoldMine® 5.0 Version 5.5 Work Area

Title Bar

Displays program name.

Main Menu

Contains commands to perform daily operations.

Toolbar

Provides a quick way to execute frequently used commands.

Org Chart (optional)

Displays the contact's associations with departments, companies, etc.

Tab Bar

Presents folders of related information about a contact.

Contact Record

The center of all information about individuals with whom you interact.

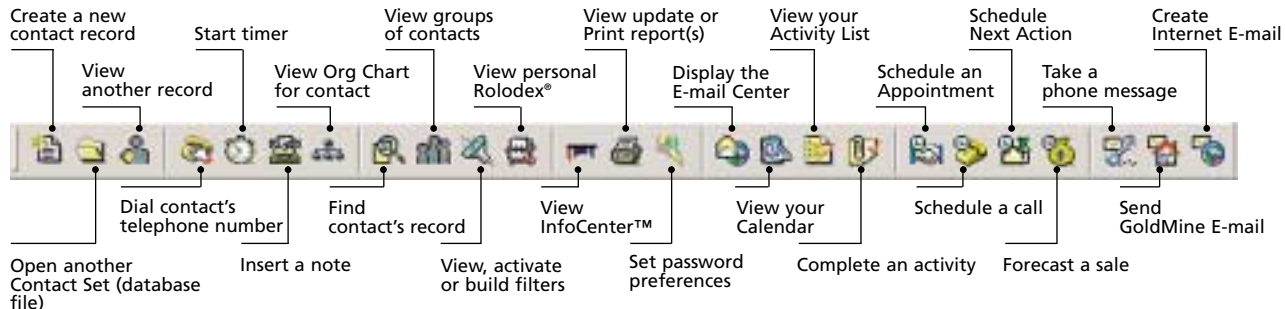
The screenshot displays the GoldMine 5.0 interface. At the top is the Title Bar with the program name 'GoldMine 5.5'. Below it is the Main Menu with options like File, Edit, View, Lookup, Contact, Schedule, Complete, Tools, System, and Help. A toolbar with various icons is located below the menu. The main window is titled 'Ian Kendall' and is divided into several sections. On the left is an Org Chart (optional) showing a tree structure of folders like 'Latham & Watkins', 'Change', 'Walker Inc.', etc. The central area shows contact details for Ian Kendall, including his title 'Technician', address '520 South Grand Suite 100, Los Angeles, CA 90007', and phone numbers. On the right is a 'Contact Record' section with fields for Phone, Fax, E-mail, and Web Site, and a 'Contact Type' section. At the bottom is a 'Tab Bar' with a table of activity logs. The Status Bar at the very bottom shows 'Demo File', 'Num Lock', 'Caps Lock', 'Friday, December 21, 2000', and '12:00pm'.

Date	User	Activity	Result	Description
Mar 1 '00	JAVIS	Open		Web browser hit
Apr 2 '00	TODD	Form		Forecast: BPP Program
Apr 2 '00	TODD	Call In	ODN	They are computer consultant, briefly explained the BPP program
Apr 2 '00	SGRT	Action	ODN	40 FU Demo
Apr 8 '00	STEPHAN	Call Back	ODN	App PROSPECT / Disagreed. Having GRP execs.
Apr 9 '00	OPES	Form		Forecast
Apr 17 '00	JCAN	Dives		Forecast of Intellicore. Forecast lead to PG
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Apr 17 '00	JCAN	Dives		Forecast of Amphimed Computer Services. Forecast lead to PG
May 6 '00	STEPHAN	Call Back	80#	App PROSPECT / Disagreed. Having GRP execs.
Dec 4 '00	STEPHART	Dives		Added to PC Update List: TMT200A1 DEF
Dec 11 '00	RISBERTP	E-mail Out	DHS	Solutions Partner Program - December Special

Status Bar

Displays the open database, status of Num Lock and Caps Lock, the logged user and the current date/time.

Basic Toolbar



Tab Bar

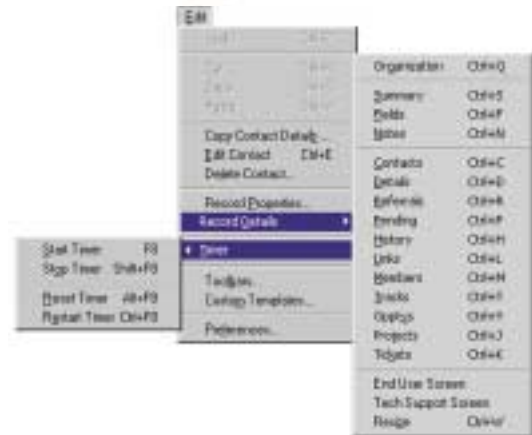
<p>Summary</p> <p>Automatically generated details on activities scheduled and completed for the contact.</p>	<p>Fields</p> <p>Customizable screens and fields that your organization uses to store special information for contacts.</p>	<p>Notes</p> <p>General information about the contact that might be helpful to managing the relationship in a variety of situations.</p>	<p>Contacts</p> <p>Information about additional contacts at the same company with whom you interact other than the primary contact.</p>
<p>Details</p> <p>Supplemental information about the contact that GoldMine can search very quickly.</p>	<p>Referrals</p> <p>Two-way associations between the contact and other contact(s) in the open database file.</p>	<p>Pending</p> <p>Upcoming activities for the contact scheduled for you or your team.</p>	<p>History</p> <p>Completed activities related to the contact logged by you or your team.</p>
<p>Links</p> <p>Files linked with the contact record, such as documents, images or applications.</p>	<p>Members</p> <p>Subsets of related contacts (groups) that include the contact.</p>	<p>Tracks</p> <p>Automated Processes™ (step-by-step instructions GoldMine evaluates to perform a series of activities) to which the contact is assigned.</p>	<p>Opptys</p> <p>Open sales opportunities forecasted for the contact or in which the contact is involved.</p>
<p>Projects</p> <p>Long-term projects that involve the contact.</p>			

Default Main Menu

File



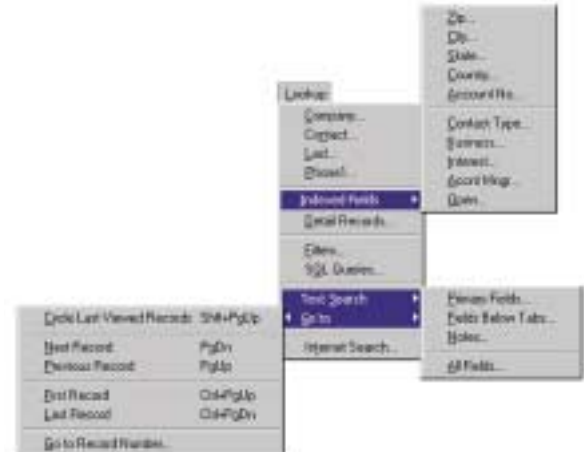
Edit



View



Lookup



Keyboard Shortcuts

Working in GoldMine

Access Main Menu	F10
Display Help for active window	F1
Display predefined field entries, lookup, clock (time fields) or calendar (date fields)	F2
Exit GoldMine	Alt+F4

Working with Contacts

Find text (in active browse window)	F3
Go to contact's record:	
Next record	Page Down
Previous record	Page Up
First Record	Ctrl+Page Up
Last Record	Ctrl+Page Down

Down	
Cycle last-viewed records	Shift+Page Up

View details about a contact:	
Org Chart	Ctrl+Q
Summary	Ctrl+S
Fields	Ctrl+F
Notes	Ctrl+N
Contacts (Additional)	Ctrl+C
Details	Ctrl+D
Referrals	Ctrl+R
Pending (Activities)	Ctrl+P
History	Ctrl+H
Links	Ctrl+L
Members	Ctrl+M
Tracks (Automated Processes™)	Ctrl+T
Oppty (Opportunities)	Ctrl+Y
Projects	Ctrl+J
Tickets	Ctrl+K

Edit contact's record:	Ctrl+E
Undo typing	Ctrl+Z
Cut selected text	Ctrl+X
Copy selected text	Ctrl+C
Paste copied text	Ctrl+V
Edit text in Notes (insert date/time stamp)	Ctrl+I
Resize the Record window	Ctrl+W
Display Personal Rolodex	F11

Scheduling Activities

Dial telephone to contact:	
Phone 1	Alt+1
Phone 2	Alt+2
Phone 3	Alt+3
Fax	Alt+4

Start timer	F8
Stop timer	Shift+F8
Reset timer	Alt+F8
Restart timer	Ctrl+F8
Create an Internet E-mail	Ctrl+Shift+E
Display Opportunity Manager	F9
Display your Calendar	F7
Display E-mail Center	F5
Display Activity List	F6

Designing Report Layouts

Center object	Alt+C
Edit object:	
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Delete
Change font for text	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 into a template:	
Section label	F6
Text label	F9
Data field	F2
Expression field	F3
System field	F4
Dialog field	F5
Line	Ctrl+F9
Picture	Ctrl+F8
from disk file	F7
from Clipboard	F8
Duplicate field	Alt+F5

Work with dialog fields (prompts):	
Create	Ctrl+R
Edit	Ctrl+M
Delete	Ctrl+D

Specify report settings:	
Define margins, ruler, and date format	F7
Define a filter	Ctrl+F7

Save report template:	
Save/update template	F10
Save template under a new file name	Shift+F10