

Quick Reference Card



GoldMine[®]

Business Contact Manager

The Business Contact Manager for You and Your Team

GoldMine Business Contact Manager Work Area

■ **Title bar** displays program name

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

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

■ **Contact record** is the center of all information about individuals with whom you interact

■ **Taskbar** places frequently used commands, documents, and macros in one convenient location

■ **Org Chart** displays the contact's associations with departments, companies, etc.

■ **Tab bar** presents detailed information about a contact



























The screenshot shows the GoldMine 5.7 interface. The title bar reads "GoldMine 5.7". The menu bar includes File, Edit, View, Lookup, Contact, Schedule, Complete, Tools, Window, and Help. The toolbar contains various icons for navigation and actions. On the left, a taskbar displays "Getting Started", "QuickStart Lessons", "Preferences", "Toolbars", "Create a Company Contact", "Contact...", "Calendar", and "E-mail Center". The main window displays a contact record for "Marty Specca" with details such as company (LANConquest), address (6000 The Edges Parkway, Suite 80, Norcross, GA 30092), and phone numbers. Below the contact details is a table with columns for Date, User, Activity, Result, and Reference, showing a list of activities.

Date	User	Activity	Result	Reference
Sep 15, 96	MASTER	Sale	WIN	\$324.00 - DS Kit I
Sep 15, 97	JENNG	Call In	ACK	would like to purchase copies of several reprints
Sep 15, 97	MASTER	Msg Rtn	ACK	DS Kit I Windows, UPS Blue
Sep 17, 97	MASTER	Action	DLV	DS Kit I Windows, UPS Blue
Sep 17, 97	MASTER	Other		Referral of Cadtech Engineering Ltd., Lead sent to Solutions
Sep 18, 97	JENNG	Msg Sent		DS Kit I Windows, UPS Blue
Sep 19, 98	MASTER	Other	BNP	Received check for \$324
Sep 20, 98	MASTER	Call In	LM	wants to place an order
Aug 20, 99	JENNG	Call Back	QFY	Fup on receipt of DS Kit I Windows
Sep 21, 99	MASTER	Call Back	INP	RS Prospect Fup
Sep 20, 00	STEVE	Other		Referral of Heather Hill, Lead sent to Solutions Partner
Sep 21, 00	TED	Action	MLS	GM W/IN RS Demo & Ld
Oct 24, 01	TED	Call In	BNP	Interested in becoming a reseller for GM

■ **Customizable background** can display your organization's logo, background graphic, and text

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

Basic Toolbar

- | | | | |
|--|---|---|---------------------------------------|
|  | Create a contact record |  | Open another contact database file |
|  | View another contact record in a new window |  | Dial the contact's telephone number |
|  | Start the timer |  | Insert a note for this contact record |
|  | View the Org Chart for the contact |  | Look up a contact's record |
|  | View personal or public groups of contacts |  | Build a filter |
|  | View your personal Rolodex® |  | View the InfoCenter |
|  | Edit, print, or fax documents |  | Print a report |
|  | Set personal preferences in GoldMine |  | Open the E-mail Center |
|  | View your Calendar |  | View your Activity List |
|  | Complete an activity |  | Schedule an appointment |
|  | Schedule a call |  | Schedule a next action |
|  | Schedule a sale |  | Send a telephone message |
|  | Send GoldMine E-mail |  | Send Internet E-mail |

Tab Bar

Summary

Automatically generated details on activities scheduled and completed for the contact

Notes

General information about the contact that might be helpful working with the individual in a variety of situations

Details

Supplemental information about the contact that GoldMine can search very quickly

Pending

Upcoming activities for the contact scheduled for you or your team

Links

Files linked with the contact record, such as documents, images, or applications

Tracks

Automated Processes™ tracks (step-by-step instructions that GoldMine evaluates to perform a series of activities) attached to the contact record

Projects

Long-term projects that are related to or involve the contact

Fields

Customizable screens and fields that your organization uses to store special information for contacts

Contacts

Information about additional contacts at the same organization with whom you interact, other than the primary contact

Referrals

Two-way associations between the contact and other contacts in the open database

History

Completed activities related to the contact logged by you or your team

Members

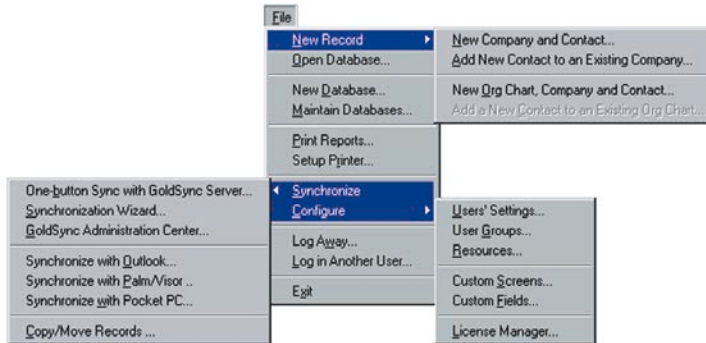
Subsets of contacts (groups) that include the contact

Opptys

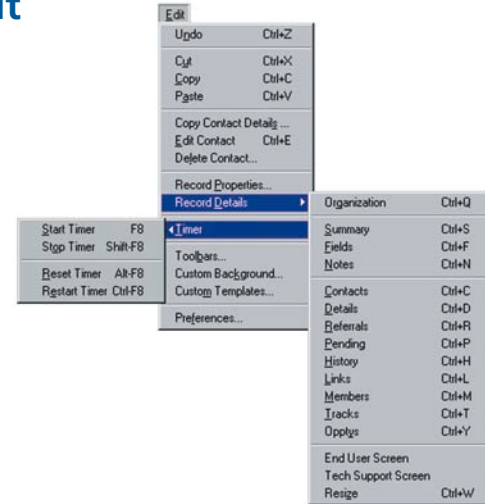
Open sales opportunities that are related to or involve the contact

Default Main Menu

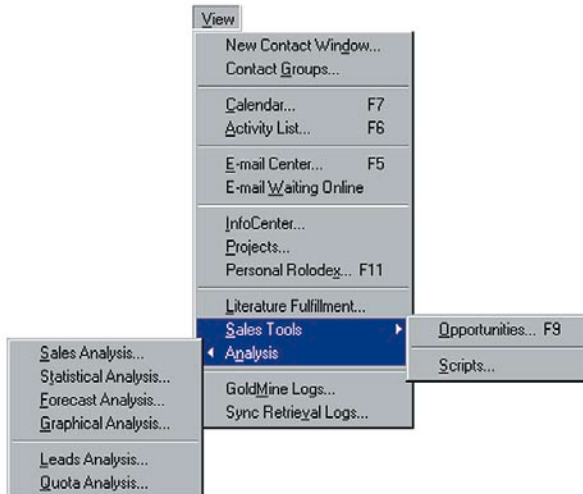
File



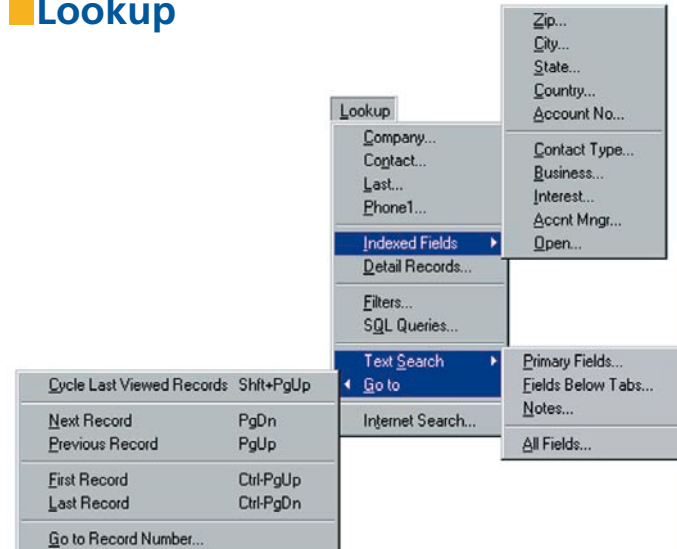
Edit



View



Lookup



Working in GoldMine Business Contact Manager

Display Help for a highlighted Main Menu command or active window	F1
Display predefined field entries, lookup, calendar (date fields), or clock (time fields)	F2
Display personal Rolodex®	F11
Exit GoldMine	Alt+F4

Working with Contacts

Search for a term (within a record)	F3
Go to contact's record:	
Next record	Page Down
Previous record	Page Up
First record	Ctrl+Page Up
Last record	Ctrl+Page Down
Cycle last-viewed records	Shift+Page Up

View details about a contact:	
Summary	Ctrl+S
Fields	Ctrl+F
Org Chart	Ctrl+Q
Notes	Ctrl+N
Additional contacts	Ctrl+C
Details	Ctrl+D
Referrals	Ctrl+R
Pending activities	Ctrl+P
History	Ctrl+H
Linked documents	Ctrl+L
Members	Ctrl+M
Automated Processes™ tracks	Ctrl+T
Opportunities	Ctrl+Y
Projects	Ctrl+J

Edit contact's record	Ctrl+E
Edit text in notes:	Ctrl+I
Undo typing	Ctrl+Z
Cut selected text	Ctrl+X
Copy selected text	Ctrl+C
Paste copied text	Ctrl+V

Scheduling Activities

Dial telephone to contact:	
Phone 1	Alt+1
Phone 2	Alt+2
Phone 3	Alt+3
Fax	Alt+4
Send an Internet E-mail	Ctrl+Shift+E
Display Activity List	F6

Display Opportunity Manager	F9
Display E-mail Center	F5
Display your Calendar	F7
Start timer	F8
Stop timer	Shift+F8
Reset timer	Alt+F8
Restart timer	Ctrl+F8

Designing Reports

Center object	Alt+C
Edit object:	
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Delete
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 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	
from disk file	Alt+F8
from clipboard	Alt+F7
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
Set up the printer	Shift+F8