Getting Started

GoldMine Software Corporation

GoldMine® 5.0

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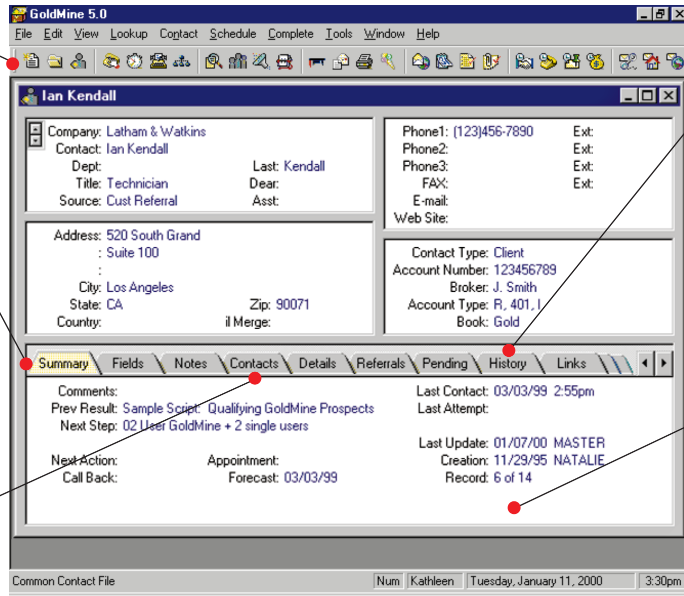
This Getting Started guide introduces you to the basics of GoldMine. As you work with the program, you will find GoldMine offers a powerful set of easy-to-use tools for you and your team.

Access powerful tools with the click of a button.

Track details in familiar tab folders.

Customize GoldMine by relabeling fields or by creating your own screens and fields.

Manage multiple contacts at a site with address and phone number support.



Instantly dial phone numbers and record details in the contact's history file.

Get instant access to summary contact information at a glance.

Plus...Internet e-mail, forecasted sales, report writing, and more. To see how GoldMine can help you and your workgroup, call GoldMine Software at 800-654-3526 for Authorized Solutions Partners or Training Centers.

In today's fast-paced world, the Rolodex® is quickly becoming obsolete. While you may already track contact information on a calendar or your PC, you are probably using a collection of different products to manage your schedule.

With GoldMine, you'll have a single solution.

To help you use GoldMine, this Getting Started guide introduces some basic GoldMine functions to help you better manage your contacts and your time.

Insert the GoldMine® CD into your CD-ROM drive. On most systems the installation will start automatically. If it does not start automatically after a few seconds, install GoldMine as follows:

1. Click Start, then select Run...
2. In the Open field, type d:/gm5setup. (Replace d: with the drive letter on your CD-ROM drive if necessary.)
3. Click on OK. The GoldMine installation program will begin. Follow the onscreen instructions. You can either accept the default installation directory or designate a different directory.
4. At the Welcome screen click Next to continue with the setup program.
5. The GoldMine program group will appear once GoldMine is installed. The following GoldMine banner will appear.

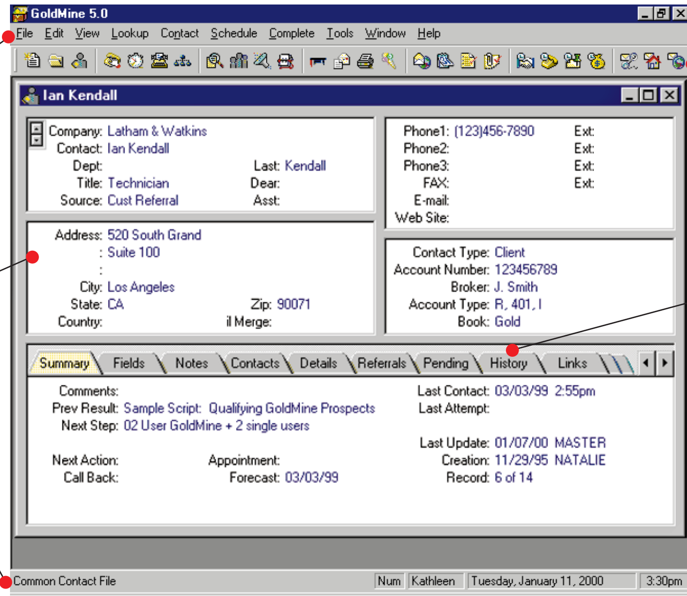
1. Type your name (up to eight characters in length).
2. Type your personal password.
3. Click on the OK button.

The GoldMine work area will appear:

Main Menu
Contains first-level commands in pull-down menus.

Client Area
Displays basic details such as address and name.

Status Line
Displays time and date, user name, the shift-state of the Number Lock and Caps Lock key, and the name of the open database.



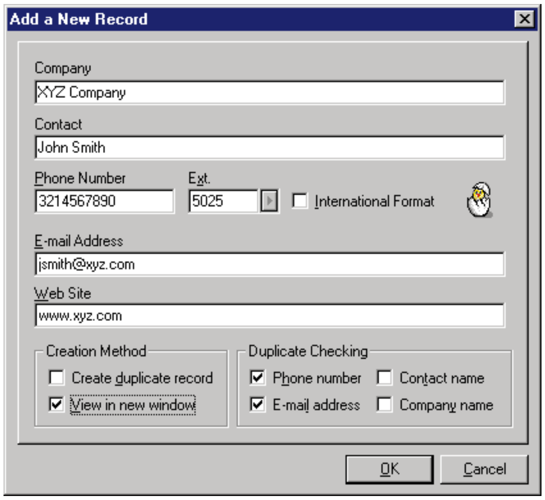
Toolbar
Offers quick mouse access to frequently used commands.

Tab Bar
Offers tab folders that display different types of contact information.

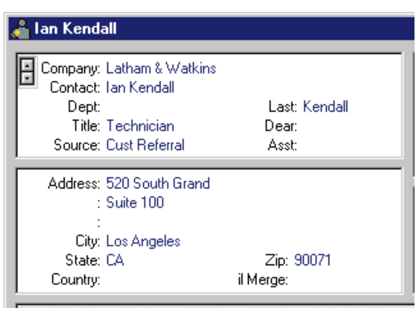
To open a tab folder, click on the tab. Information is displayed in each folder. For more options, right-click the mouse to pull up the local menu.

Click outside the last tab to display the second row of tabs. Click again to return to the first row.

GoldMine relates all information to a contact, therefore, creating contact records builds your database.



1. From the Main Menu, select File|New Record...
2. Type the name of your contact's organization.
3. Type your contact's name.
4. Type your contact's phone number and extension, if any.
   (Note: Check the International Format option if this phone number uses a non-U.S. / Canadian format.)
5. Type your contact's e-mail address. GoldMine allows you to centralize all your e-mail communications by linking incoming and outgoing e-mail to the contact record automatically.
6. Keep the default view method on Current Window.
7. Click OK.

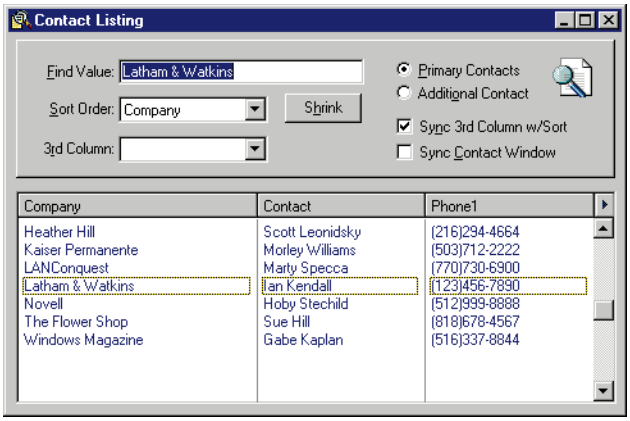


To move between fields, press the Tab k0ey and complete each field as needed.

For most fields, you can press F2 or right-click to display a lookup menu.

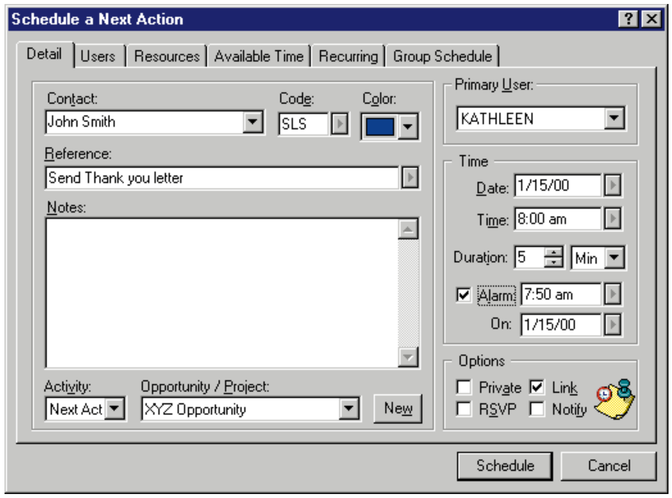
After you have created a database of contacts, you can quickly locate or pull up your contacts' records.

1. From the Main Menu, select Lookup.
2. Select Company... You can also double-click on the field label Company, for example.
3. Click on Expand to open the Contact Listing window.



4. Enter a search value, such as a company's name. (Note how the listing updates as you type).
5. Under Sort Order, pick another field to search, such as Contact.
6. Double-click on the highlighted entry to pull up the contact that matches your typed entry.

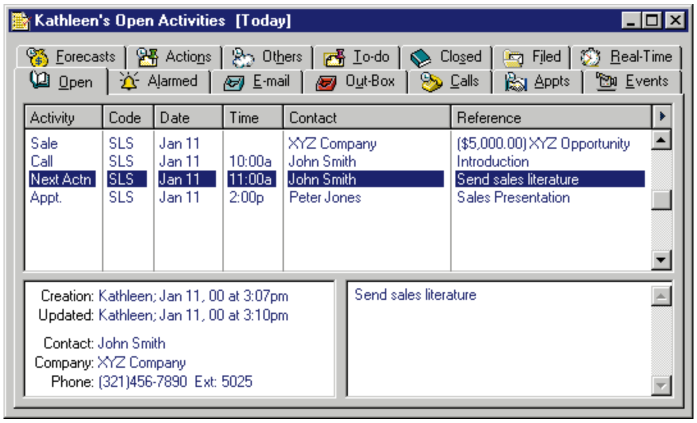
Now, you're ready to start scheduling activities related to your contacts.



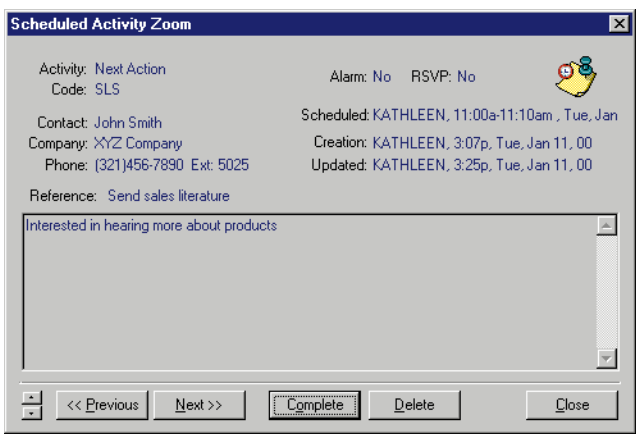
1. From the Main Menu, select Schedule|Next Action...
2. Press F2 for a Code lookup, then select a code.
3. Press F2 for a lookup list or type your own text.
4. Type any details that will be helpful in the Next Action.
5. Enter a date for the Next Action, or press F2 to display a graphical calendar.
6. Click on the Alarm checkbox to activate a pop-up reminder.
7. Click on Schedule or press the Enter key when done.

From any scheduling window, you can select tabs to handle multiple users, recurring activities or check for conflicts, if needed.

To get more details about your scheduled work, use your Activity List.

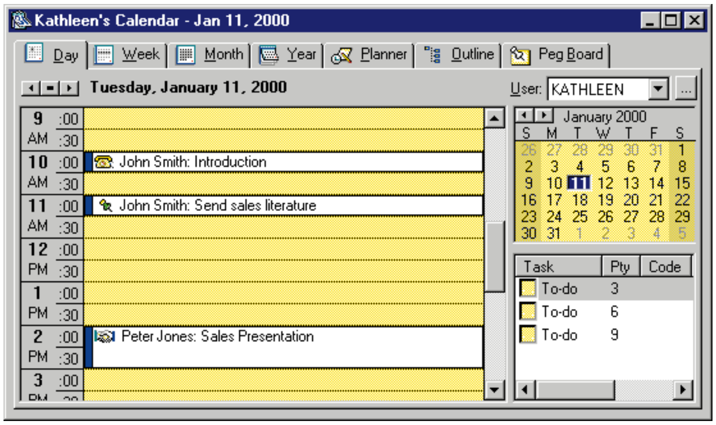


1. From the Main Menu, select View|Activity List.
2. Select the tab that holds the type of activities you want displayed. The Open tab displays all your pending activities.
3. To view your activities for a specified date range, select the Open tab, then right-click to display the local menu. From the local menu, select Options| Date Range. Select any options listed.



4. To view details for an activity listed in the Open folder, highlight it, then right-click to display the local menu. Select Zoom...

Once you and your team begin scheduling activities, you'll want to check GoldMine's calendar to determine available times for scheduling new activities.

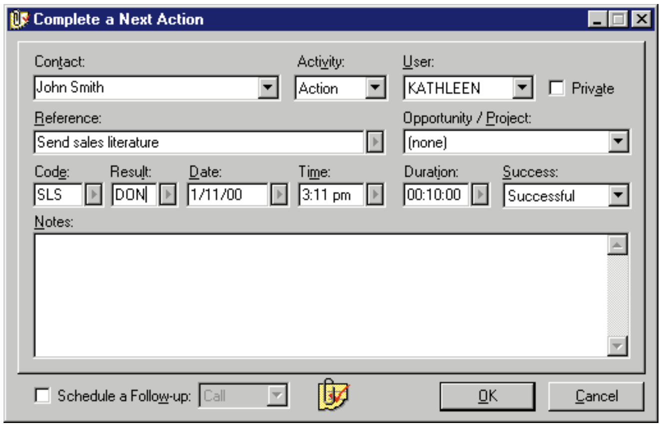


1. From the Main Menu, select View|Calendar...
2. To change the calendar view, click on any tab.
3. To schedule an activity, right-click and choose Schedule.

GoldMine allows you to reschedule by drag & drop and offers timed and timeless activities.

(Note: Double-click on any activity to pull up the contact's record.)

To keep track of what you've done, you'll want to record the completion of your work. This way, GoldMine keeps a complete log of what occurred with whom, why and when.



1. From the Activity List, select the call that you scheduled in "Scheduling an Activity." Then right-click to bring up a local menu and choose Complete...
2. Press F2 to display the Code.
3. Press F2 to display the Result lookup, then select an entry.
4. Type any details that will help you when reviewing the call.
5. Automatically schedule any follow-up task by checking the box, and selecting a task.
6. When done, click OK.

Now, when you pull up the contact's History tab folder, you'll see all completed activities.

Congratulations!

You've just used GoldMine to manage both your Rolodex and calendar information. You've taken the first step in being more productive.

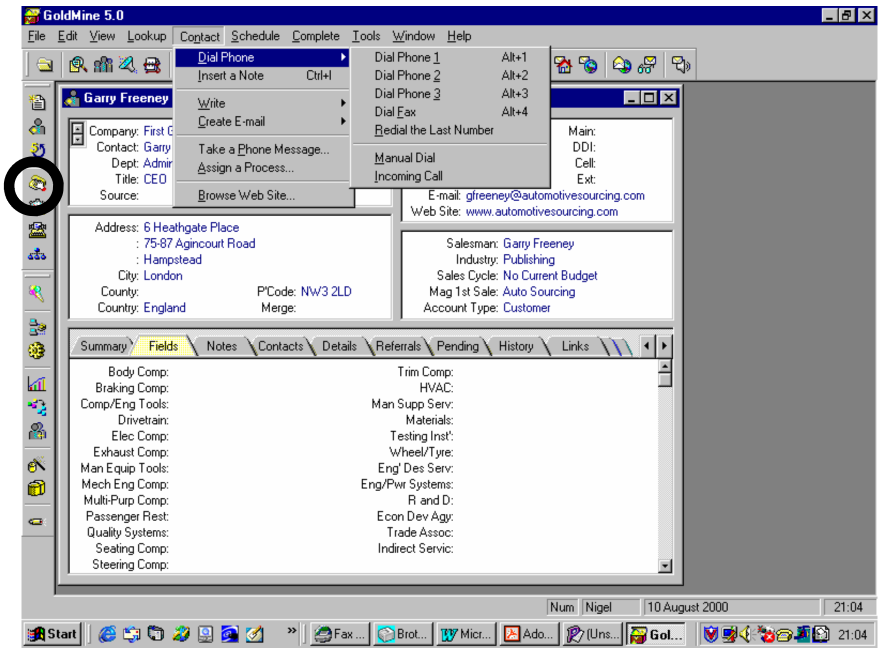
To learn more, you can access GoldMine's online Help in one of the following ways:

- To display context-sensitive information for a dialog box or window, press F1.
- To scroll through a menu of online Help topics from the Main Menu, select Help|Help Topics.
- To display a selected topic, click on the topic entry.
- To search for a topic, select Help|Help Topics... Select the Find tab, then type the first few letters of the topic in the search term field. GoldMine will advance to the section that matches your entry. Highlight the word or term that most closely matches your topic, and then press the Enter key.
- To display a step-by-step procedure similar to the instructions in this Getting Started guide, select Help|How Do I... You can click on a listed procedure, such as "Managing Activities," and the text for the selected topic will appear.
- You can also perform a search as described in the previous bullet item.
- To print a displayed topic, click on the Print... button.

To exit GoldMine, from the Main Menu, select File|Exit.

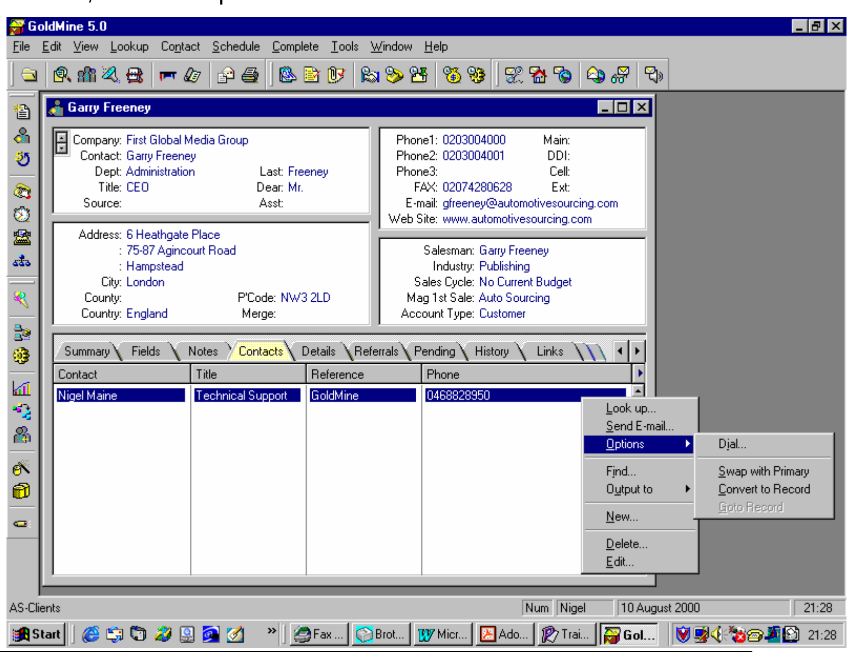
GoldMine has been installed in conjunction with ARC Screen Pop software. This enables you to dial from your computer screen.

To Dial, simply press ALT + 1 to dial Phone 1
ALT + 2 to dial Phone 2
ALT + 3 to dial Phone 3



It is also possible to dial Phone 1 by clicking on the Phone Dialler icon as circled above. Also, by double-clicking on the Title “Phone 2“ or “Phone 3”, you can dial the number even quicker.

Right-click on the name in the Contact Tab on the bottom half of the screen, click on Options and then Dial.



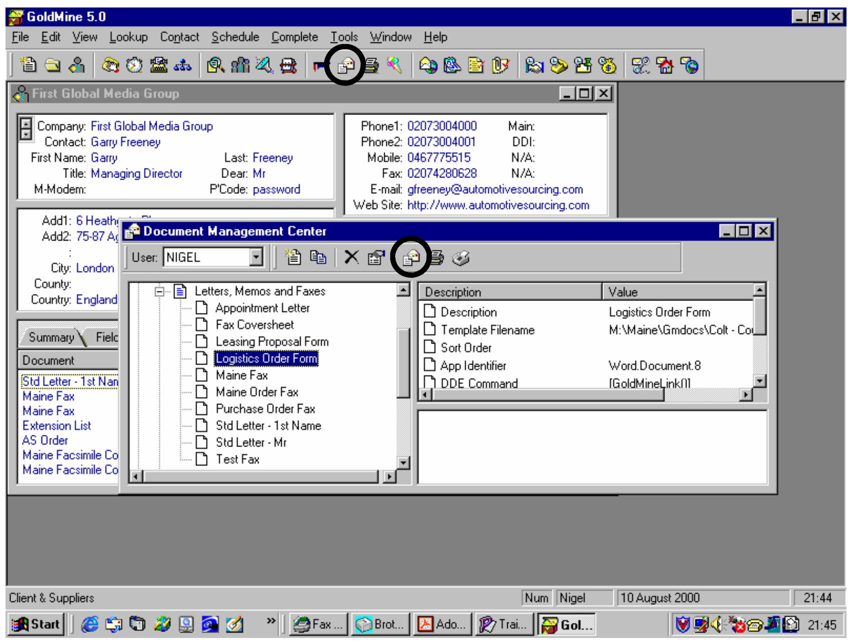
A library of standard documents has been prepared that you are able to use. This will speed up the preparation of any repetitive documentation that is produced daily.

To access the documents, click on the envelope and paper icon and the Document Management Center dialog box will appear.

Select the document that you need to print out by clicking on the required title. Then click on the envelope and paper icon next to the printer and fax icon on the Document Management Center Toolbar.

This will launch Microsoft Word (if your screen doesn't change, click on the "W" icon on your bottom toolbar.

If required, edit any necessary information and print as normal.



Another integrated feature of this system is Fax. To send a fax, first make sure that you have started FaxRush under Start | Programs | FaxRush 32 | Client for GoldMine

1. Click on Schedule | Other Action.

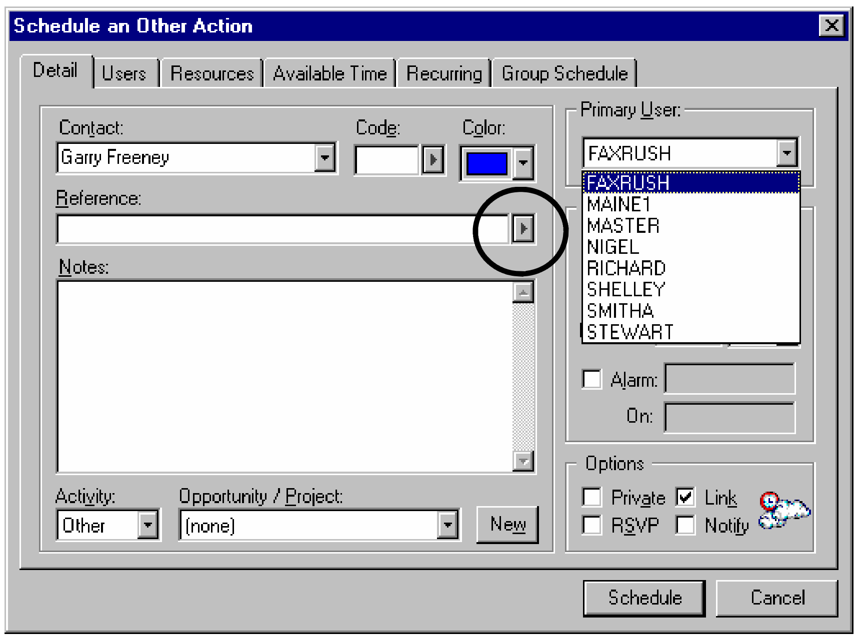
2. Click on the Primary User box and select FAXRUSH

3. Click on the Reference Arrow and another dialog box will appear. Select the Header Page required.

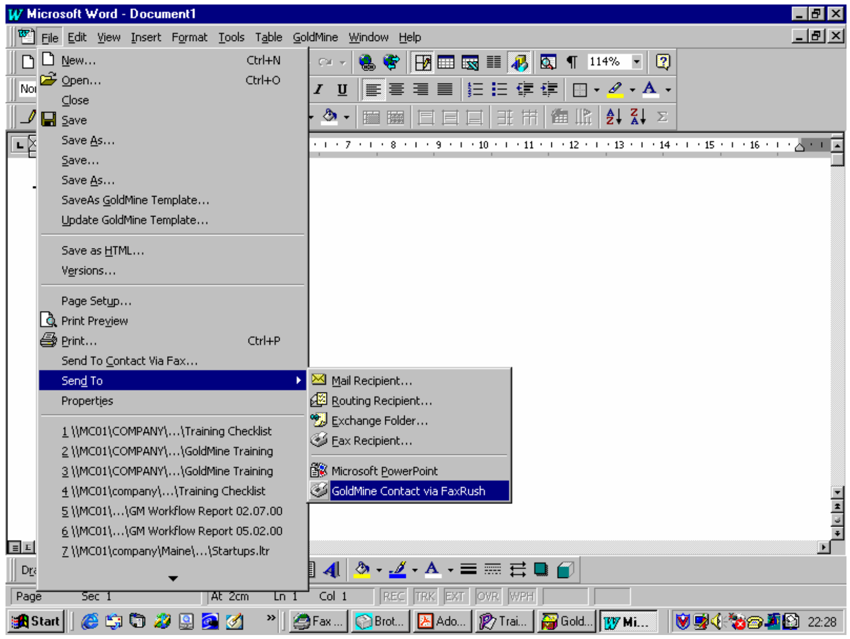
4. Then type in your message in the Notes section.

5. When you have finished, click Schedule

You've just sent your first fax!!!

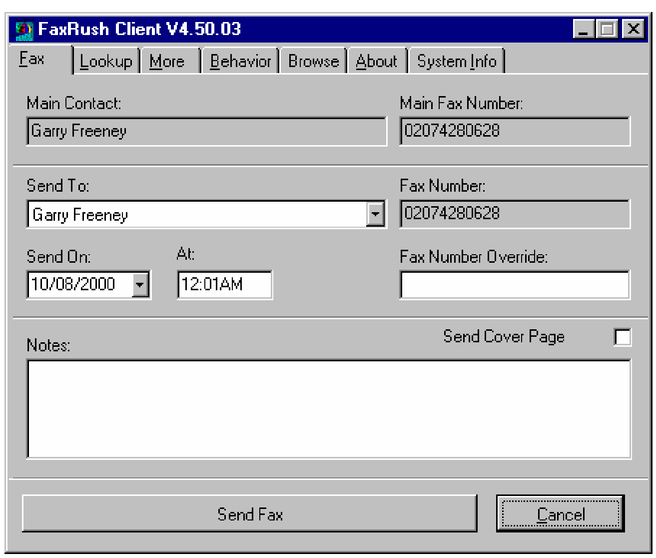


Repeat each of the steps used to merge and print a document, however, when the document has been loaded, make your amendments. When you have finished, click on File | Send To | GoldMine Contact via FaxRush.



A new dialog box will appear.

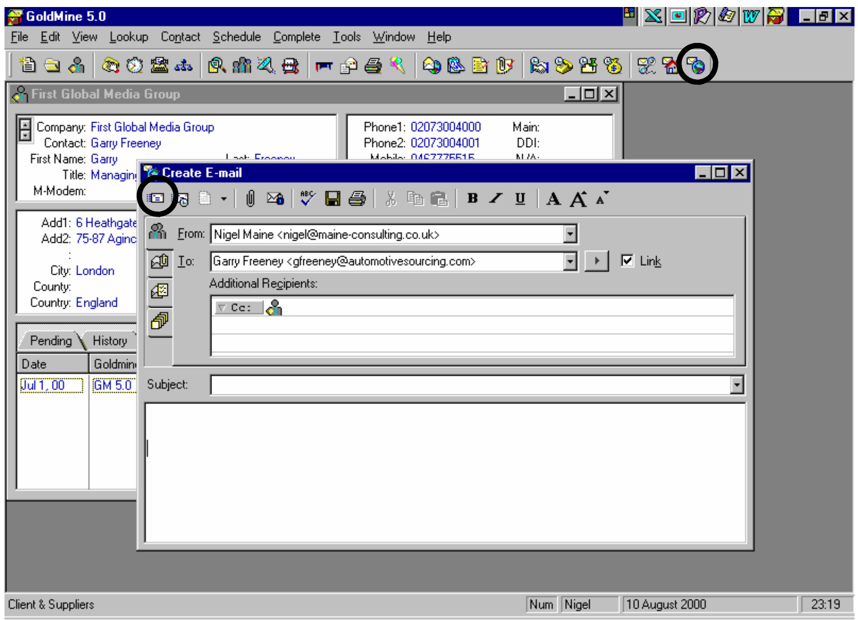
1. Choose to send a cover page by ticking the box.
2. Type in your notes.



GoldMine will replace Microsoft Outlook on you desktop. All of your emails will automatically filed for both inbound and outbound messages. GoldMine will recognise an inbound email and if there is a match, file it for you.

It is important to delete unnecessary messages, however, emails will be stored in month and year order.

1. Click on the Globe and Envelope icon.
2. Select the Recipient from the Drop Down Box (or leave).
3. Enter the Subject Description.
4. Attach documents by clicking on the Paper Clip icon.
5. Right Click in Attachment dialog box and select Attach.



When you have completed the attachments, click on the Envelope icon located at the top left of the email screen to send the message.

Depending on the work you are carrying out at any given time, your target customers will have something in common. It may be their location, type of business or indeed the type of products they manufacturer.

GoldMine enables you to set up a filter process that presents you with the customers or prospects you want to see.

1. Click on the funnel icon for the Filters & Groups dialog box.
2. Click on New and enter your description.
3. Click on Build then Click on Field Name Drop Down Box.
4. Select a Description (I.e. Post Code).
5. From the middle box select the Operator (I.e. Begins with).
6. From the third box select the Value or type in (e.g. SW – for businesses in South West London).
7. Click Insert Condition and then OK.
8. Click Preview, before going back to Filters and clicking Activate.
9. When finished, go back to Filters and click release.

For more detailed information see the Technical Reference Guide.