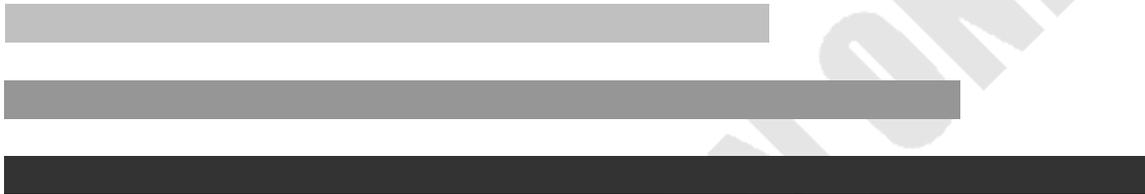# Getting Acquainted

- **Launching GoldMine**

- **GoldMine's Look and Feel**

- **Getting Help**

- **Review**

Launching GoldMine

Your first step is to launch GoldMine from your Windows desktop.

1. Double-click the **GoldMine** shortcut.

GoldMine Opening Screen

This is the GoldMine opening screen. Here you must type your username and password in order to log into GoldMine.

2. Click in the *Username* field.

3. If your username for this course, MASTER, isn't there already, please type it. Then press ⬚ .

4. *Password:* Student.

5. Click the **OK** button (or press ENTER).

GoldMine's Look And Feel

When you start GoldMine, you'll see the following screen:

WINDOW TITLE BAR

WORK AREA

MENU LINE

TOOLBAR

NAVIGATION PANE

TAB BAR
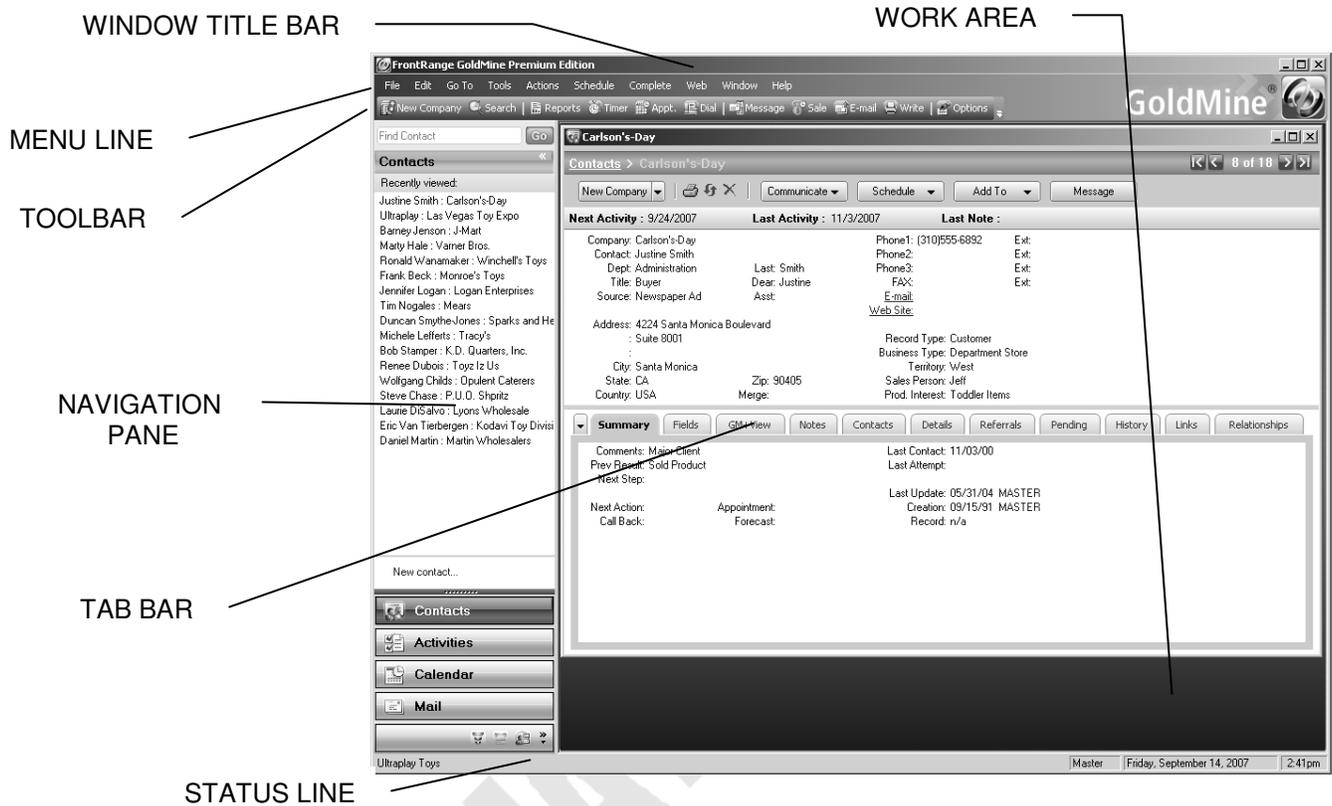
STATUS LINE

The GoldMine display is divided into three main sections:

1. **Top:** Window title bar, menu line, and toolbar.
2. **Middle:** Navigation pane on the left, work area on the right
   (currently showing one record window).
3. **Bottom:** The status line.

Note that when the navigation pane is open, the work area is shifted to the right.

When performing tasks, you can either use the menu options on the menu line, or you can click an icon on the toolbar or an item in the navigation pane.

1. Hold the mouse arrow over the **New Company** ![New Company] toolbar icon.

   A yellow box pops up (these boxes are called "bubble help", or "tooltips"), explaining the function of this toolbar icon. Tooltips appear throughout GoldMine to show additional information when you need it.

2. Slowly move the mouse arrow across the toolbar icons to see tooltips explaining each icon.

In the work area, you see a window entitled "Carlson's-Day". This window is a GoldMine contact record.

3. Click the **Next Record** ⊳ button on the top right of the contact, to move to the next contact.

4. Click the **Previous Record** ◁ button to move to the previous contact.

    You can also use the PG DN key to move to the next contact, and the PG UP key to move to the previous contact.

5. Click the **Last Record** ⊳| button to jump to the bottom of the contact set.

6. Click the **First Record** |◁ button to return to the top of the contact set.

    You can also use CTRL + PG DN and CTRL + PG UP to move to the top and bottom of the contact set. And, you can use any of the links displayed in the navigation pane to select contacts.

7. Click the **Contacts >** link on the top left of the contact record.

Company	Contact	Phone1	City	State	Zip
J-Mart	Barney Jenson	(310)555-0026	Lakewood	CA	90712
K.D. Quarters, Inc.	Bob Stamper	(515)555-3490	Des Moines	IA	50318
Martin Wholesalers	Daniel Martin	(310)555-9647	Los Angeles	CA	90064
Sparks and Hensler	Duncan Smythe-Jones	011 44 181 984 7200	London		WC3A 5CG
Kodavi Toy Division	Eric Van Tierbergen	011 32 01545 1160	Hombeek		B-2811
Monroe's Toys	Frank Beck	(818)555-6601	Chatsworth	CA	91311
Logan Enterprises	Jennifer Logan	(310)555-6477	Alhambra	CA	91715
Carlson's-Day	Justine Smith	(310)555-6892	Santa Monica	CA	90405
Lyons Wholesale	Laurie DiSalvo	(818)555-9081	Studio City	CA	91604
Varner Bros.	Marty Hale	(310)555-2344	Los Angeles	CA	90028

Next Activity : 8/15/2008 9:00 AM   Last Activity : 11/5/2006 8:16 PM   Last Note :

Company: J-Mart
Contact: Barney Jenson
Dept: Administration   Last: Jenson
Title: Buyer   Dear: Barney
Source: Client   Asst:

Address: 2244 Del Amo Blvd.
    :
    :
City: Lakewood
State: CA   Zip: 90712
Country: USA   Merge:

Phone1: (310)555-0026   Ext:
Phone2:   Ext:
Phone3:   Ext:
FAX: Ext:
E-mail: barn@jmart.com
Web Site:

Record Type: Customer
Business Type: Department Store
Territory: West
Sales Person: Jeff
Prod. Interest: Assortment

The Contact List

This is GoldMine's contact list. This handy listing of your contacts helps you find and select the contacts you want.

The main information on the selected contact is displayed in the bottom half of this window. Searches can be performed in the top right. You'll become more familiar with this window as this course progresses.

8. Double-click the Carlson's-Day listing to return to the contact record.

9. Open the **Window** menu, and choose **New Contact Window**.

An entirely new contact list appears in the work area. You can navigate this window just as you navigated the original window. This way you can have more than one contact window visible if you require.

10. Click the **Minimize** ▬| button on the top right of the new contact list.

Minimized Contact List

GoldMine's various windows can be sized, moved around, minimized, restored — in all ways treated as separate objects. You can have as many windows as you need minimized in your work area, waiting to be restored and used.

11. Click the **Restore Up** 🗗| button on the minimized window.

12. Click the window's **Close** ✕| button.

13. Click Justine's **Close** ✕| button.

The contact record only minimizes. One contact record window will be active at all times.

As you schedule activities and perform operations in GoldMine, you'll see these automatically involve the active contact. Whenever you do something concerning a particular contact, you'll need to have that contact on your screen and "active" when you do it. Having activities connected, or "linked", to the proper contact is central to how GoldMine operates.

14. Click the **Restore Up** 🗗| button on Justine's minimized contact record.

15. Double-click the title bar of Justine's contact record. (See next page for screen.)

Tabbed View

This is GoldMine's Tabbed view. In this view, each window you open will appear as a separate tab.

16. Click the **Calendar** button in the navigation pane.
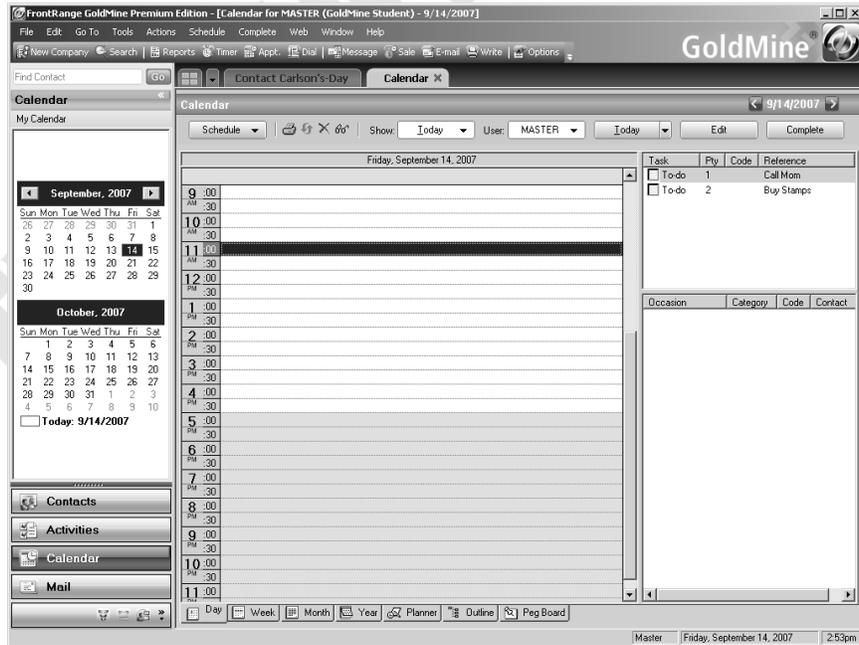
A New Tab Displayed

Us this view to show a lot of information at one time.

The down arrow ⬇ tab appears when you have more than one window visible, giving you a menu to select the window you want (just in case you've got tabs which have disappeared off the right edge of the screen).

17. Click the "x" on the **Calendar** tab to close the tab.

18. Click the window ⬚ tab to return to the Classic View. (You can also move between views with the **Window | Arrange By** submenu options.

19. Click the **Contacts** button at the top of the navigation pane.

The Navigation Pane Minimized

If work area space is at a premium, you can temporarily minimize the navigation pane. Notice that you'll still have access to the shortcut buttons.

The navigation pane shows context-sensitive information (as you just saw) relating to the window active in the work area. So you'll need it open, most of the time.

20. Click the restore ⬚ button to display the navigation pane.

GoldMine's "task bar" is another way to access GoldMine functions. It's like a toolbar which can be configured with icons representing *any* menu option in GoldMine, as well as external applications, web pages, and other complex task items. Task bar configuration is covered in detail in our System Administration course. You can toggle the task bar on and off by right-clicking over the toolbar area and choosing the **Task Bar** menu option.

Getting Help

There are two ways to get help in GoldMine:

The Help menu: GoldMine's **Help** menu accesses GoldMine's help system, including links to GoldMine's online forums.

Context-sensitive Help: When performing an operation, the ⌨️F1 key will bring up help relating specifically to what you are doing.

ON YOUR OWN

Practice

Review

1. Practice moving around the contact set, using any of the methods described in this lesson.

2. Use links in the navigation pane to jump to contacts.

3. Use the contact list to scroll and select contacts.

4. Use the **Window | New Contact Window** menu options to open and arrange several contact windows.

5. Familiarize yourself with the Tabbed and Classic views.

6. When you're done, leave only one contact window remaining onscreen.
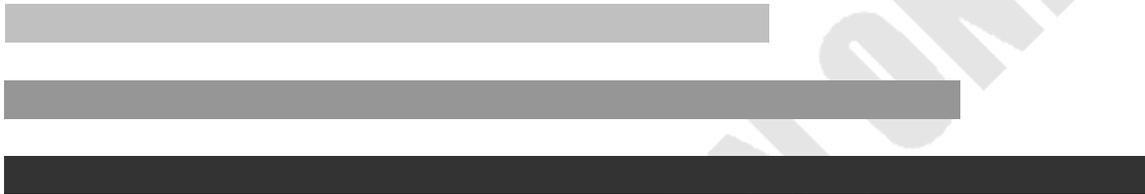
Adding Records

- **Creating A New Contact**

- **Lookup Windows**

- **Adding/Editing A Lookup Entry**

- **The ZIP Code Database**

- **The Tab Bar**

- **Duplicate Records**

- **Review**

Creating a New Contact

You'll now add a new record to the contact set.

1. Open the **File** menu.

2. Choose **New**.

3. Choose **Company and Contact**.
    (You can also use the **New Company** ![New Company] toolbar icon, the **New Company** button on the contact record, or the **New contact...** link on the navigation pane.)

Creating A New Contact

A new GoldMine record begins with the dialog box you see here.

Some organizations create special *record types* for specific types of contacts. You can leave the *Record Type* field blank or select **[Plain Contact Record]** from the drop-down list to create an ordinary all-purpose contact record.

4. Here, you'll leave the *Record Type* field blank. Press ⏎ to continue.

    These white squares where text can be typed are called *entry fields*. The cursor (the blinking line) indicates the "insertion point", where you can type text.

5. Press ⏎ in the *Company* field. The cursor moves to the *Contact* field.

6. Press [SHIFT] + ⏎ . The cursor moves back to the *Company* field.

7. Click the mouse in the *Ext*. field.

You can click to the right of any field on this screen — and on your contact record — to open that entry field and begin typing text.

These are the three ways you can move through any dialog box in GoldMine — 🖰, 🖰 +🖰, and a mouse-click.

8. Click in the *Company* field.

9. Type Pam's Club. Do not press ENTER .

In a dialog box like this, one button always has a bold outline. This outline shows you that when you press the ENTER key, that button will be clicked.

| OK | Cancel |

10. Press 🖰 to finish editing in this field and move to the next one.

11. Type Pam Dalton in the *Contact* field, and press 🖰.

12. Click in the *Phone1* field, type 3104593443, and press 🖰.

GoldMine will automatically format this phone number when you're done adding the record. Always add a phone number as numbers only, and let GoldMine add the dash and parentheses.

The *Ext*. field is for a phone number extension. But you can also use it to hold other information.

13. Ext: type the letter c.

Lookup Entries

| hone Format |
| Ext: c ▶ |
| Ext: Car |
| Ext: Cell |
| Ext: |
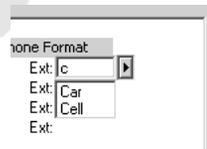
These entries are choices from the field's *lookup window*. Selecting one of these items will insert that text into this field. You'll explore lookups in more detail in a moment.

1. Press ⬇ to highlight **Cell**.

2. Press 🖰 to accept the entry and move to the next field.

If you use ENTER to select an entry, you'll remain in the field. You can also select an entry with the mouse.

The **International Phone Format** option controls how the phone number will be formatted. If activated, this option will turn off automatic formatting for this phone number — so you can type in an international phone number.

You'll find check boxes throughout GoldMine. When a check is present, the option is active.

14. Click in the *E-mail* field, type `pdalton@pamsclub.com`, and press 🔄.

15. In the *Web Site* field, type `www.pamsclub.com`.

The options at the bottom of this dialog will be covered later in this course.

16. Clicking the **OK** button.

And you've now added a new record to the contact set!

You could have continued adding information in the previous dialog — often, however, you'll want to add a contact's basic information, then proceed quickly to the contact record to perform other operations. This is what you've done here.

Lookup Windows

You now proceed to the contact record where you'll continue adding information. Move back and forth through this window just as you did through the dialog box.

1. Type `A` in the *Dept* field.

2. Press ⬇ to highlight "Administration".

3. Press 🔄 to accept the entry and move to the next field.

4. The *Last* field has been automatically filled with the last name from the *Contact* field. Press 🔄.

If the contact's last name changes in the *Contact* field, GoldMine will automatically update the *Last* field. The *Last* field always contains the very last word in a contact's name. If the name ends with "Jr.", the *Last* field would show "Jr." — something to watch out for.

5. For now, put nothing in the *Title* field, and press 🔄.

6. Type Pam in the *Dear* field, and press ⌐. This field holds the salutation for any letters you'll write.

   You might put "Pamela" in this field if you wanted to be more formal. Tailor the contents of the *Dear* field to the tone of your client contact.

7. Click the lookup ▶ button in the *Source* field.

Lookup Window

This is a GoldMine lookup window. Lookup windows are available for nearly every field in GoldMine, if configured by your system administrator. This window lets you add, edit, and select lookup entries for this field.

You can use your keyboard and the scroll bars to move around this window.

8. Press r. The highlight jumps to "Radio", which is the first entry beginning with "r".

9. Click the **Select** button.

   You return to the *Source* field, and "Radio" has been added.

10. While still in the *Source* field, and with your mouse pointer over the field, click the right mouse button.

   This is another way to bring up the lookup window. Pressing the F2 key while in an entry field will also bring up the lookup window.

Lookup windows can be set to automatically pop up and require entries to be selected from the list before proceeding. They can also be configured to perform other functions which cut down on data input and help standardize field contents for all users.

Adding A Lookup Entry

1. As you use GoldMine, especially in the beginning, you'll often need to add lookup entries. Click the lookup window's **New** button.
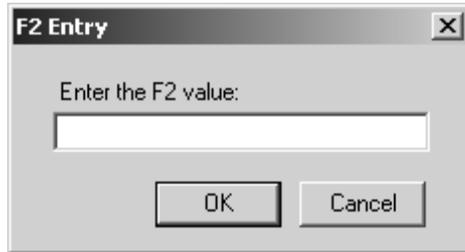
Adding A Lookup Entry

2. Type Web Page; (include the semi-colon).

3. Press ⌷ENTER⌷ to finish adding this new lookup entry.

4. Click the **Select** button (or double-click the **Web Page;** entry).

   "Web Page" is added to the *Source* field, after "Radio", and GoldMine automatically adds a comma! A semi-colon at the end of an entry combines the entry automatically with whatever's in the field, and places the comma correctly. (If you select an entry without a semi-colon when there's already information in the field, the new entry will *replace* that information.)

   A pair of slashes // following a lookup entry lets you include a comment, which will not be inserted into the field. You can use this feature to include abbreviations and codes in lookup windows, with text explaining what the abbreviation or code means.

   Write access to the lookup window is often restricted to the average user, so you may not be able to add or edit entries.

Editing A Lookup Entry

Often you'll find you need to edit your lookup entries. If you decide on different codes, brand name changes, and so on.

1. Move back to the *Title* field using the [SHIFT] +[⇥] keystrokes.

2. Open the lookup window.

3. Scroll down and highlight the "Mangler" entry.

    However true this typo may be at times, it needs to be corrected.

4. Click the **Edit** button.

5. Type `Manager`.

6. Click the **OK** button.

7. Click the **Select** button.

    "Manager" (the correct title for this contact) is added.

The ZIP Code Database

1. Move forward to the *Address* field.

2. Type `World Headquarters` and press [⇥].

3. Type `5000 Sunset Blvd.` in the second address field and press [⇥].

4. Type `Building A` in the third address field.

5. Click in the *Zip* field.

    GoldMine maintains ZIP codes in a special database, and when you type in a ZIP code already on file, GoldMine will fill in the city and state automatically.

6. Type `90029` and press [ENTER] to finish editing.

    Since GoldMine has this city and state on file, they're automatically inserted. But what would happen if this ZIP code wasn't in the database?

7. Click in the *Zip* field.

8. Clear the information, type 90210, and press 🖫.
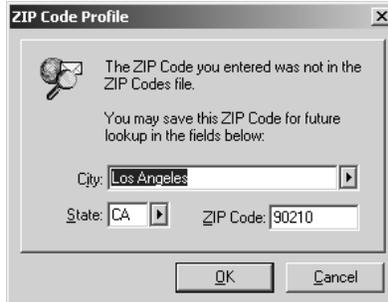
Zip Code Profile dialog

This box will appear if the ZIP code you type is not already on file.

9. Replace the information in the *City* field with Beverly Hills.

10. Since you already have the proper state in the field, click the **OK** button to finish adding the new ZIP code profile, and insert the information into your record.

    While using GoldMine, you might want to leave the *Country* field empty if the contact is in your own country.

    The *Merge* field is for any special code you might want to use to identify this contact for mail merges. Mail merges are explained in the Correspondence section.

The Tab Bar

The Tab Bar

The lower half of the contact record is separated from the upper by the *tab bar*. The tab bar controls what information displays in the bottom half of the contact record.

1. Click in the *Prod. Interest* field.

2. Press 🖫.

    When fields are available in the bottom half of the contact record — as they are when the **Summary** or **Fields** tabs are selected — editing jumps from the top half to the bottom half.

3. Type `Corporate offices closed on weekends.`

Comments field information should be of general importance to all users, and not something that will change frequently.

4. Finish editing your new contact by pressing ⌷ENTER⌷.

    A tab is selected by clicking on it to reveal the information it describes. You can also use the ⌷↹⌷ key (when no field is open), or the ⌷←⌷ or ⌷→⌷ keys, to move through your tabs. Also, each tab can be displayed by a unique ⌷CTRL⌷ key combination, as detailed below:

Summary ⌷CTRL⌷ + ⌷S⌷	This tab, currently selected, shows a brief rundown of the important events in the contact's history.
Fields ⌷CTRL⌷ + ⌷F⌷	This tab shows the user-defined fields on the contact. These fields are set up by your system administrator. Ultraplay has its own custom fields.
GM+View ⌷CTRL⌷ + ⌷V⌷	This tab shows a customizable view — a web page HTML file — containing any information you wish to put there.
Notes ⌷CTRL⌷ + ⌷N⌷	This tab shows any of the notes attached to the contact.
Contacts ⌷CTRL⌷ + ⌷C⌷	This tab shows any additional contacts associated with the contact.
Details ⌷CTRL⌷ + ⌷D⌷	This tab shows the contact's detail records.
Referrals ⌷CTRL⌷ + ⌷R⌷	This tab shows the contact's referral links.
Pending ⌷CTRL⌷ + ⌷P⌷	This tab shows the activities currently pending for the contact.
History ⌷CTRL⌷ + ⌷H⌷	This tab shows the contact's completed activities.
Links ⌷CTRL⌷ + ⌷L⌷	This tab shows the contact's linked documents.
Relationships	This tab, with no shortcut keystroke, displays relationships between contacts in a tree view.

Other tabs are available for some of the more advanced GoldMine features.

5. Practice clicking on a tab or using the control key combinations listed above to see a sample of the information that each tab shows.

    The upper half of the contact record shows you basic contact information — name, address, and other important fields. The lower half shows varying supplementary information on the contact. The lower portion (referred to as a *view*) can also be resized, to display more information.

6. Positioning the mouse pointer at the bottom edge of the contact record, until it becomes a double-headed arrow ↕ . Then click and drag the border up or down.

7. You can also size the tab bar and views upward. Point the mouse at the border above the tab bar until the splitter bar ⬍ appears. Then click and drag the border up. Take care not to obscure any of the fields on the upper half of the contact record.

> You can access tabs or change their order with the down arrow ⬇ tab, or through your GoldMine Options. You can also click and drag a tab to any other location on the tab bar.

Duplicate Records

The Duplicate Record option lets you duplicate much of the contact record currently displayed. This makes data entry easier when another contact from the same company. (The best way to manage multiple contacts at the same company is to use Additional Contacts, which are covered in the Contact Maintenance section of this course.)

1. Move to Bob Stamper's contact.

2. Click the **New contact...** link in the navigation pane.

3. Click the **Create duplicate record** option to activate it.

4. Click the **View in new window** option to activate it. This option will show the new record in a new contact record window.

   The **Duplicate Checking** area is a very handy way to avoid adding people already in the contact set. The active items will be compared to your contact set, and you'll be alerted if the information is already there.

5. Bob happens to have a brother who just started work at K.D. Quarters. Click in the *Contact* field, and type `Jim Stamper.`

6. Click in the *Phone1* field and type `5155553129.`

7. Click the **OK** button.

   And Jim is added — with most of the same information on his record as Bob's. The *Title* field and the *Dear* field are not duplicated, nor is any of the information on the **Summary** view. Any information shown on the **Fields** view, however, is duplicated.

8. Finish editing this contact record.

9. Close the new contact record window.

ON YOUR OWN

Practice

Review

1. Add a new contact record with your own name and company (be sure to deactivate the **Create duplicate record** option!). Instead of your own phone number, use (555)555-5555.

2. Familiarize yourself with lookup windows.

3. Practice moving around while editing.

4. When done, return to the top of the contact file.