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## Introduction To GoldMine Training Agenda



### **KNOWLEDGE:**

It is presumed that the delegate will be familiar with Windows and general P.C usage

### **AIMS:**

To provide end user training on GoldMine. When the delegates return to the workplace they will be able to use competently the basic functions of GoldMine.

### **TIME:**

Your training course can be from ½ day to 1-week and can train up to 20 people at a time (pending equipment is available for each user).

Your trainer will arrive at 10am and plan to take a lunch break from 12:30-1:30pm. The course will resume at 1:30pm and the will conclude at 4-4:30pm.

- **The GoldMine Ethos**
- **The GoldMine Layout**
- **Searching for Records**
- **Entering Contact information**
- **Scheduling and Completing Activities, literature requests, and phone calls.**
- **The GoldMine Calendar**
- **Completing Activities**
  - **The Activity List**
  - **Sending E-mails**
  - **The E-mail Centre**
    - **Mail Merging**
  - **Intro to Reports**
- **Intro to Opportunity Manager**
- **Email and Word Templates**
- **Introduction to Groups, Filters and Tagging Records**

