

GOLDMINE "BEST PRACTICES" TRAINING

CLASS OUTLINE

DATABASE CONSIDERATIONS

DATABASE HYGIENE

- DUPLICATION CLEAN-UP
- RECORD ENTRY / DATA INTEGRITY
- PRINT/MERGE CODING
- FIELD LOOKUP LISTS
- FILTERS VS. GROUPS

INFORMATION MANAGEMENT

- SEARCH OPTIONS
- ONE-TO-ONE VS. MANY-TO-ONE
- RELATIONSHIPS – REFERRALS VS. ORGANIZATION TREE

WORKDAY ORGANIZATION

ACTIVITY MANAGEMENT

- PRIORITIZATION
- DELEGATION
- ACTIVITY LISTS
- CALENDAR VIEWING

MASS COMMUNICATION

TEMPLATES

- DOCUMENT MANAGEMENT CENTER
- WORD DOCUMENT TEMPLATES
- EMAIL MESSAGE TEMPLATES
- ORGANIZING YOUR TEMPLATES

EMAIL MARKETING

- SEGMENTATION OPTIONS
- DYNAMIC SIGNATURE LINES
- TRACKING OPTIONS

OTHER RESOURCES

KNOWLEDGE BASE

- WHY USE IT
- ORGANIZING YOUR INFORMATION
- USING TOPICS AS EMAIL MESSAGES

GM+ VIEW

- MANAGING VIEWS
- WHY USE THEM

Duration: 1.5 hours

Fee: \$99/person