Quick Reference Card

GoldMine Software Corporation

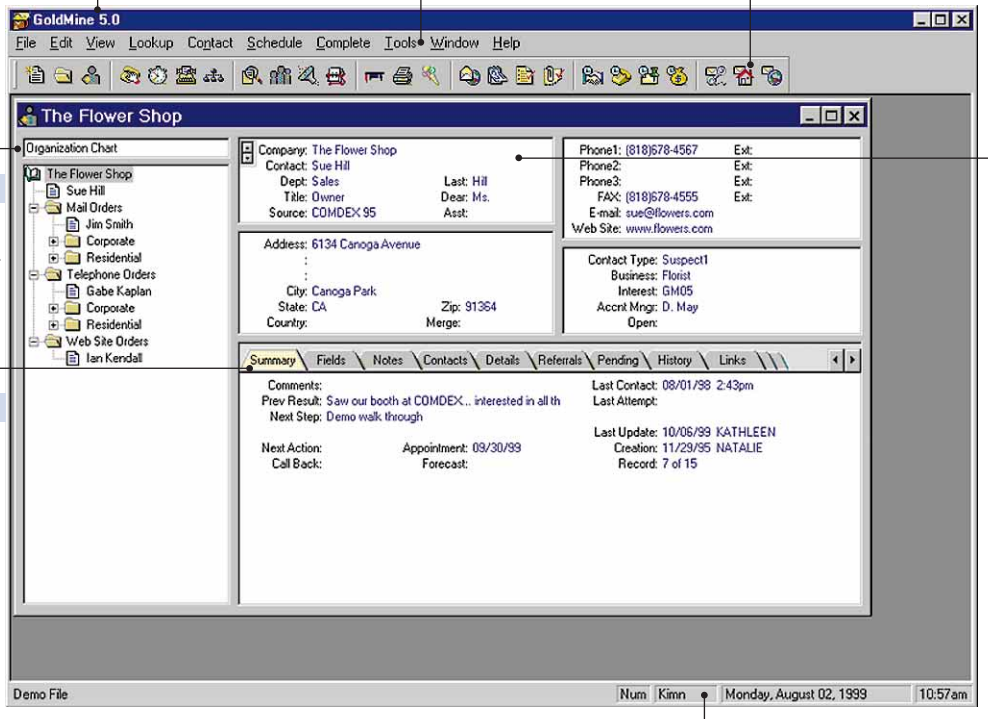
GoldMine® 5.0

GoldMine's Work Area

Title Bar
Shows the version of GoldMine running on your system.

Main Menu
Contains commands to perform operations in GoldMine.

Toolbar
Provides a quick way to perform common operations.



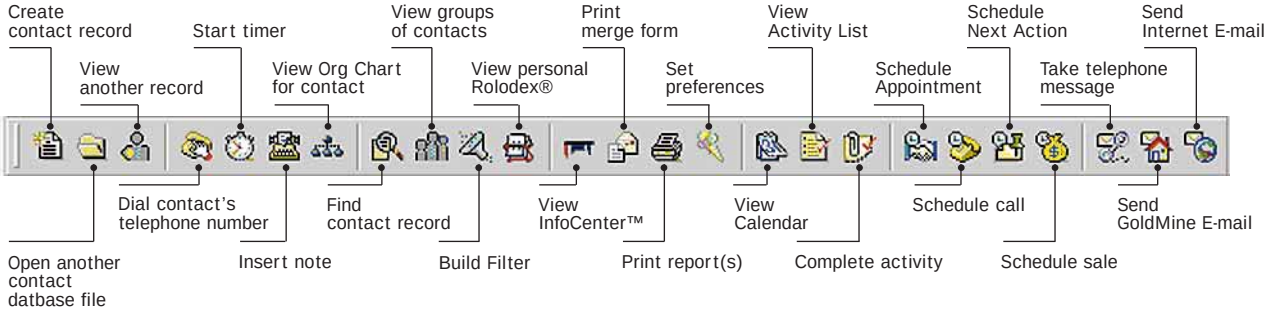
Org Chart (optional)
Displays the contact's associations with departments, companies, etc.

Contact Record
The center of all information about individuals with whom you interact.

Tab Bar
Presents detailed information about a contact.

Status Bar
Displays the open database, status of Num Lock and Caps Lock

Basic Toolbar



Tab Bar

Summary
Automatically generated details on activities scheduled and completed for the contact.

Fields
Customizable views and fields that your organization uses to store special information for contacts.

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

Contacts
Information about additional contacts at the same organization with whom you interact less frequently than the primary contact.

Details
Supplemental information about the contact that GoldMine can search very quickly.

Referrals
Two-way associations between the contact and other contact(s) in the open database.

Pending
Upcoming activities for the contact.

History
Completed activities related to the contact.

Links
Documents or applications linked with the contact record, such as a form letter.

Members
Subsets of contacts (groups) that include the contact.

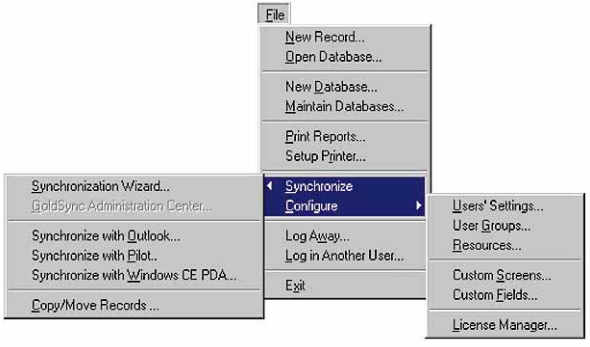
Tracks
Lists Automated Processes™ tracks (step-by-step instructions GoldMine evaluates to perform a series of activites) assigned to the contact.

Opptys
Sales opportunities that involve the contact.

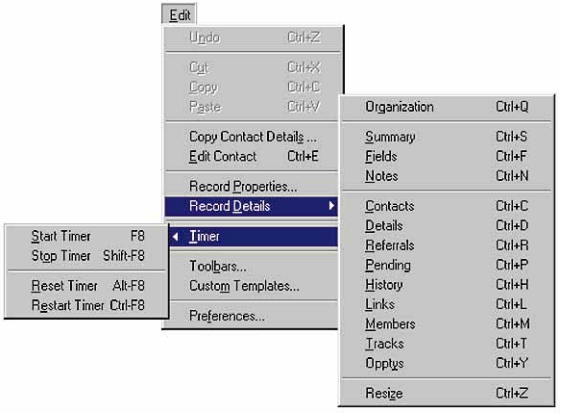
Projects
Long-term projects that involve the contact.

Default Main Menu

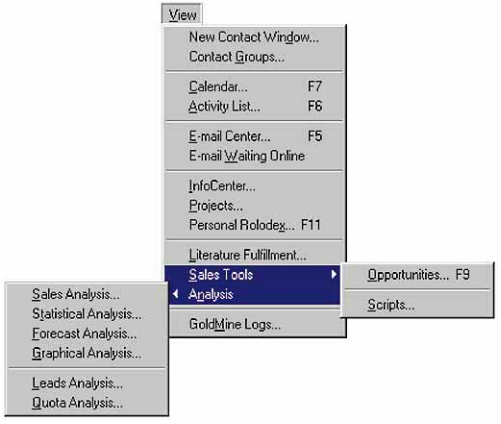
File



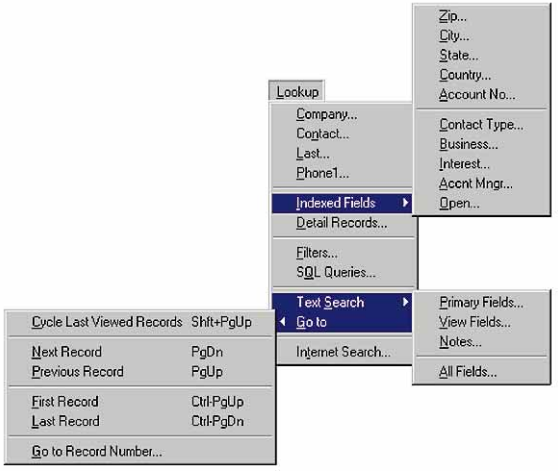
Edit



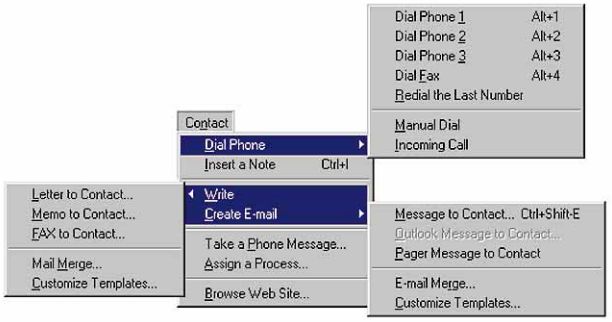
View



Lookup

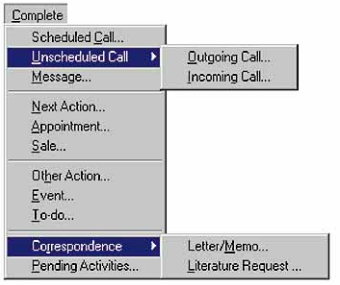


Contact

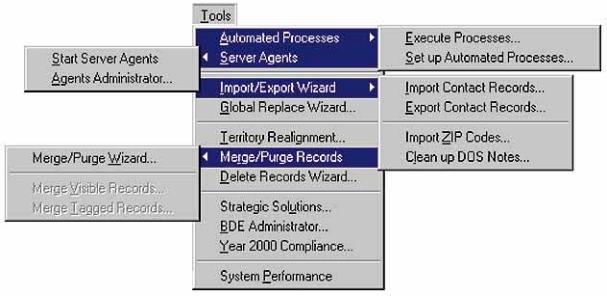


Schedule

Complete

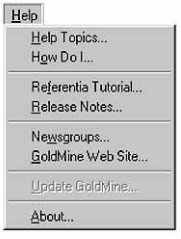


Tools



Window

Help



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Keyboard Shortcuts

Working in GoldMine

Access Main Menu	F10
Display Help for active window	F1
Display predefined field entries, lookup, clock (time fields) or calendar (date fields)	F2
Exit GoldMine	Alt+F4

Working with Contacts

Find text (in active browse window)	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:	
Org Chart	Ctrl+Q
Summary	Ctrl+S
Fields	Ctrl+F
Notes	Ctrl+N
Contacts (Additional)	Ctrl+C
Details	Ctrl+D
Referrals	Ctrl+R
Pending (Activities)	Ctrl+P
History	Ctrl+H
Links	Ctrl+L
Members	Ctrl+M
Tracks (Automated Processes)	Ctrl+T
Opptys (Opportunities)	Ctrl+Y
Projects	Ctrl+J
Edit contact's record:	Ctrl+E
Undo typing	Ctrl+Z
Cut selected text	Ctrl+X
Copy selected text	Ctrl+C
Paste copied text	Ctrl+V
Edit text in Notes (insert date/time stamp)	Ctrl+I
Display Personal Rolodex	F11

Scheduling Activities

Schedule a call	Shift+F5
Dial telephone to contact:	
Phone 1	Alt+1
Phone 2	Alt+2
Phone 3	Alt+3
Fax	Alt+4
Start timer	F8
Stop timer	Shift+F8
Reset timer	Alt+F8
Restart timer	Ctrl+F8
Schedule a Next Action	Shift+F6
Write an Internet message	Ctrl+Shift+E
Display Opportunity Manager	F9
Display your Calendar	F7
Display E-mail Center	F5
Display Activity List	F6

Designing Report Layouts

Center object	Alt+C
Edit object:	
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Delete
Change font for text	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	Ctrl+F8
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

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