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Nota di contenuto	Gold Mine 8 For Dummies; About the Author; Author's Acknowledgments; Contents at a Glance; Table of Contents; Introduction; The Various Flavors of Gold Mine; How to Use This Book; Foolish Assumptions; How This Book Is Organized; Conventions Used in This Book; Icons Used in This Book; Where to Go from Here; Part I: Gold Mine Premium Basics; Chapter 1: Gold Mine: An Overview; Discovering Everything that Gold Mine Can Do; Investigating a Few of the Things Gold Mine Isn't Designed to Do; Planning a Successful Project; Providing Training: The Key to Success; Chapter 2: Getting Around in Gold Mine Understanding the Gold Mine Interface The status bar; Getting Help; Chapter 3: Setting Up Your Preferences; Customizing Your Tabs; Customizing All Your Preferences; Chapter 4: Accessing Gold Mine Remotely; Securing Your Data; Syncing Up with Gold Sync; Adding iGold Mine Plus; Accessing Gold Mine with Remote Desktop; Using Handheld Devices; Part II: Managing Contacts; Chapter 5: Creating and Viewing Client Records; Creating New Records; Finding a Record in Your Database; Using a Custom Field; Chapter 6: Handling Notes and Secondary Contacts; The Main Notepad; The Contacts Tab Chapter 7: Details and Referrals Taking Care of the Details; Making Use of Referrals; Chapter 8: Using Filters, Groups, and SQL Queries; Building and Using Filters; Building and Using Groups; Building and Using SQL Queries; Part III: Managing Activities; Chapter 9: Scheduling Activities; Defining Activities; Creating Activities; Entering Activities on the

Calendar; Filling in the Scheduling Dialog Box; Rescheduling an Activity; Scheduling Activities for Other People; Using the iCal Features; Scheduling Recurring Activities; Chapter 10: Viewing Scheduled Activities
Viewing Activities Using the Calendar Checking the Activity List; Viewing Groups of Users on the Calendar; Chapter 11: Dealing with and Completing Scheduled Activities; Four Ways to Complete Your Activities; The Best Way to Complete an Activity; Chapter 12: Sales Forecasting; Setting up Quotas; Entering Your Forecasts; Viewing Your Sales Pipeline; Completing Your Forecasts; Part IV: Marketing and Support; Chapter 13: Managing Your Leads; Importing Leads into Gold Mine; Assigning Leads to Users; Analyzing Your Leads; Using Automated Processes; Chapter 14: Managing Your Marketing Using the Campaign Manager Using the Essential Fields for Marketing with Gold Mine; Chapter 15: Handling Cases; Configuring Your Case Setup; Using Templates; Handling Cases; Using Your Knowledge Base; Part V: Managing Documents; Chapter 16: Integrating with Word; Understanding What Versions Work Together; Creating Templates; Using Your Templates; Chapter 17: Sending and Receiving E-Mail; Configuring Your E-Mail System; Sending E-Mail Messages; Getting Your Mail; Chapter 18: Using Outlook; What Versions Work Together; The Three Options for Outlook; Using GISMO; Chapter 19: Linking Documents
Exploring the Links Tab

Sommario/riassunto

If you run a small business, you know how important customer relationship management, or CRM, can be to your bottom line. And you know it can be a bit daunting. Well, not with Gold Mine and Gold Mine 8 For Dummies! Gold Mine is business software designed to help you organize your contacts, track activities, schedule appointments, create reports that tell you how you're doing, and make accurate business projections. Gold Mine 8 is completely revised to make it more useful than ever, once you get the hang of it. That's where Gold Mine For Dummies comes to the rescue! Written by an
