


Activities in GoldMine

GoldMine revolves around Activities – specific date-based events that are linked to a specific contact, allowing you to go to any contact and see what's happened and what's planned.

There are many types of Activities that you can perform in GoldMine, but this guide is going to focus on a handful – the ones you'll use most often...

Focus on the Activities You'll Use Most

Appointment:	Face-to-face meeting	
Call:	Phone Call	
Next Action:	Task Related	
Event	Multi-Day Activity	

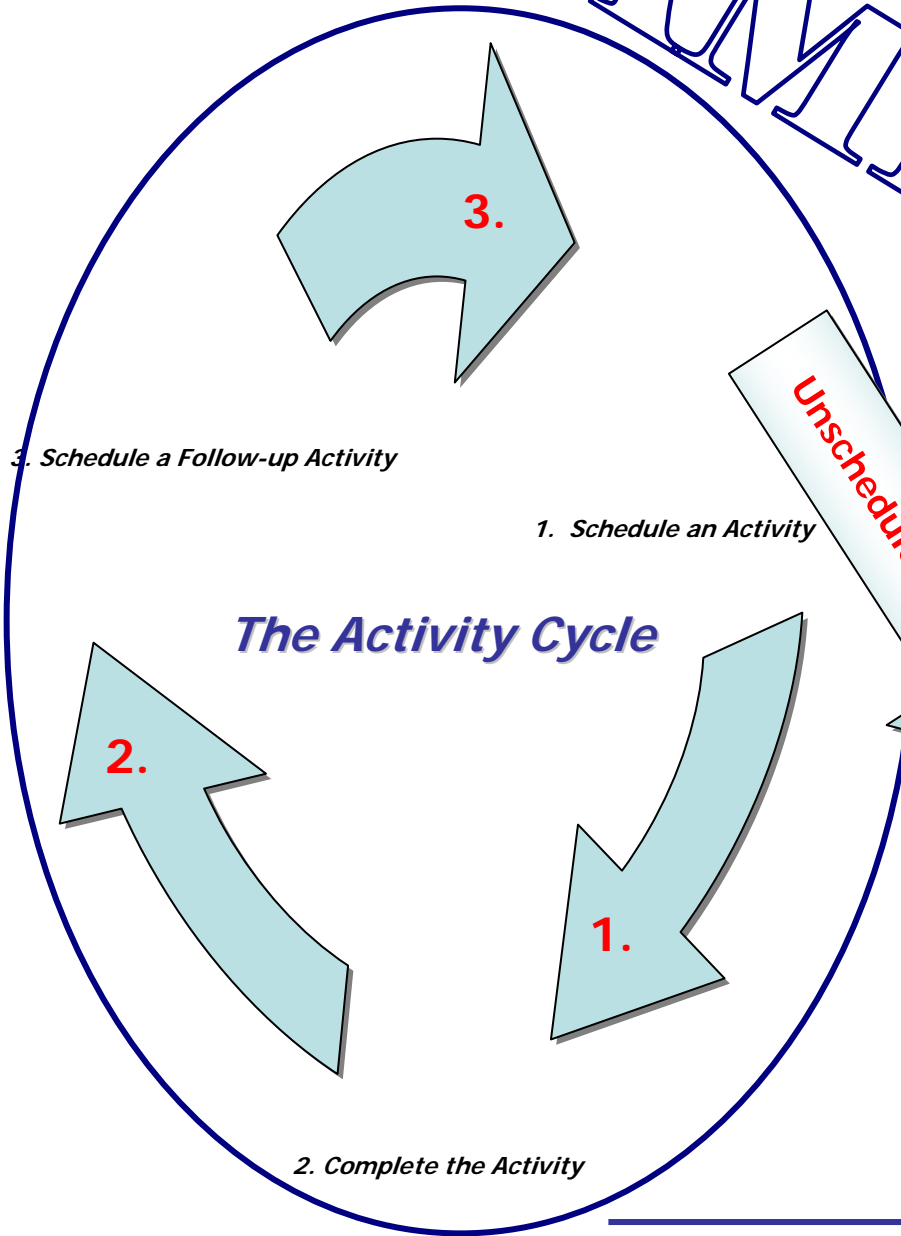
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- Schedule a reminder for yourself – a phone call, an appointment.

Once you perform that activity, it's necessary to 'complete' it. This step moves the activity from the calendar to the contact's history and, at the same time, provides an opportunity to enter detailed notes.

- At the same time you can schedule a follow-up activity – keeping the process going.



Log the results of an unscheduled activity:

- Call
- Appointment

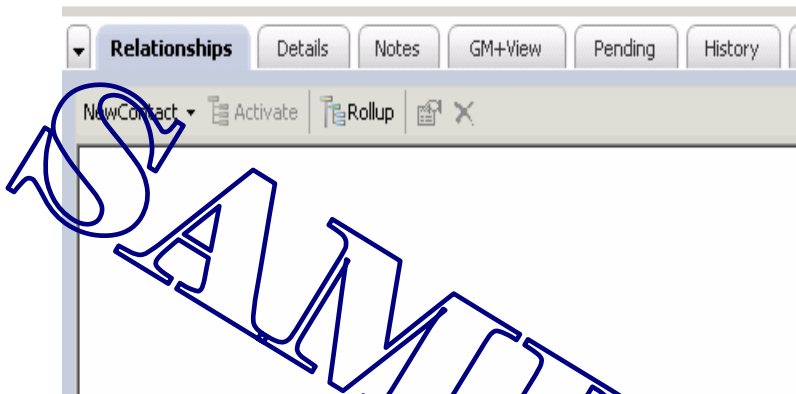
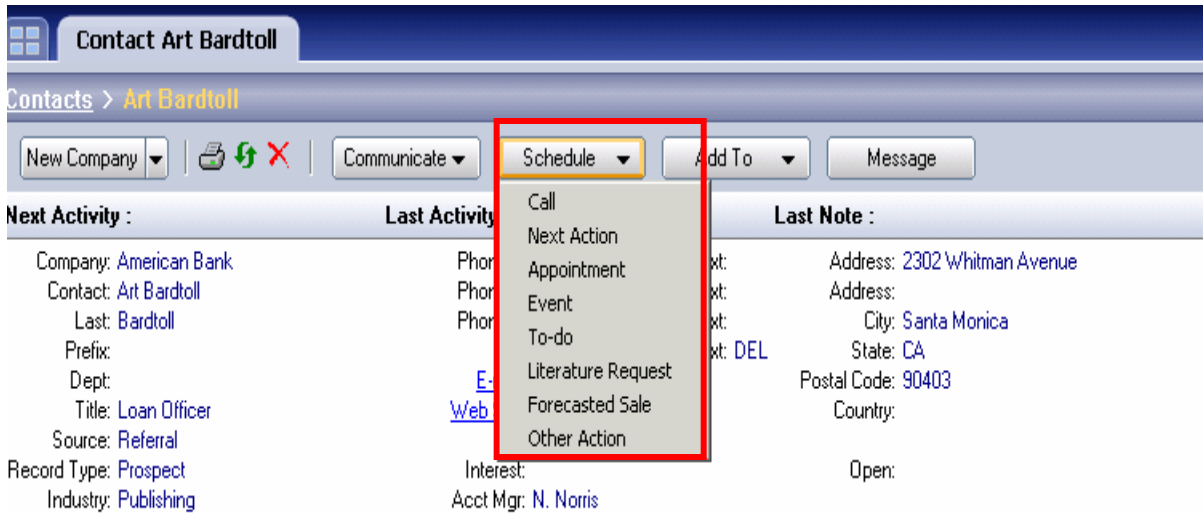
i.e. Cold Call or Incoming Call

You see a pattern?

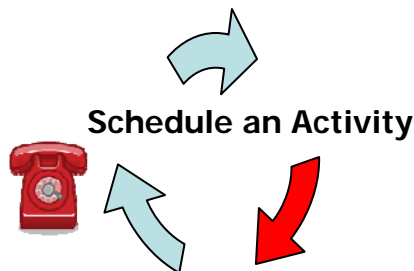
Schedule -> Complete -> Schedule a Follow-up Activity

(and the occasional unscheduled activity)

Scheduling an Activity – Schedule a Call (Phone Call)

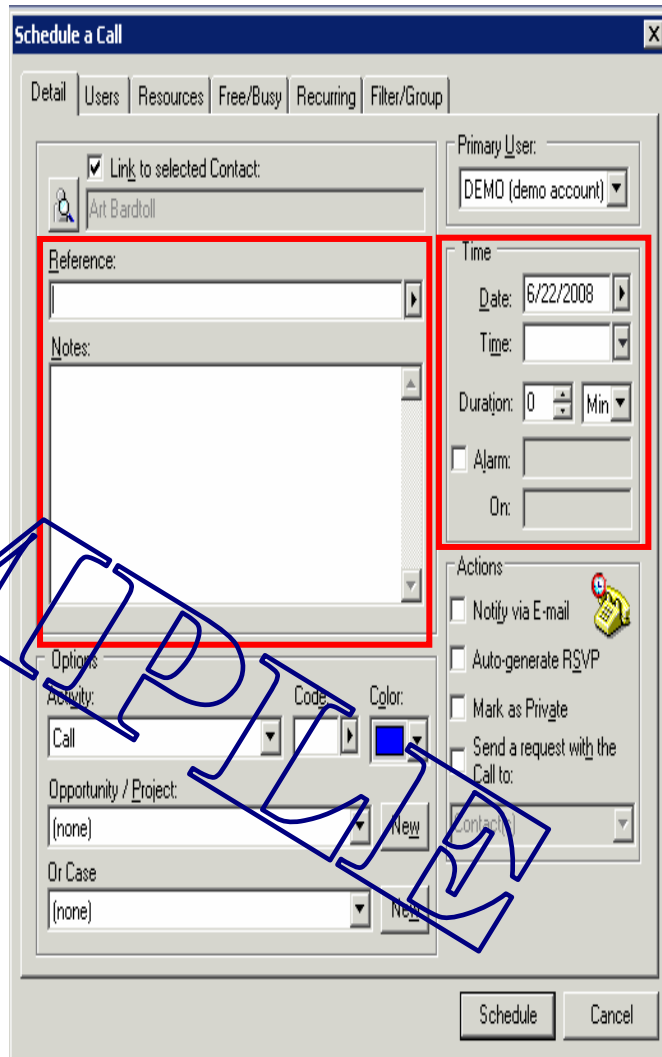


- You can schedule an activity directly from the contact record that will link to the activity. It's important to ensure the activity is linked to the correct contact.
- Click on the drop down on the Schedule button to display the types of activities to schedule.
- Select 'Call'.

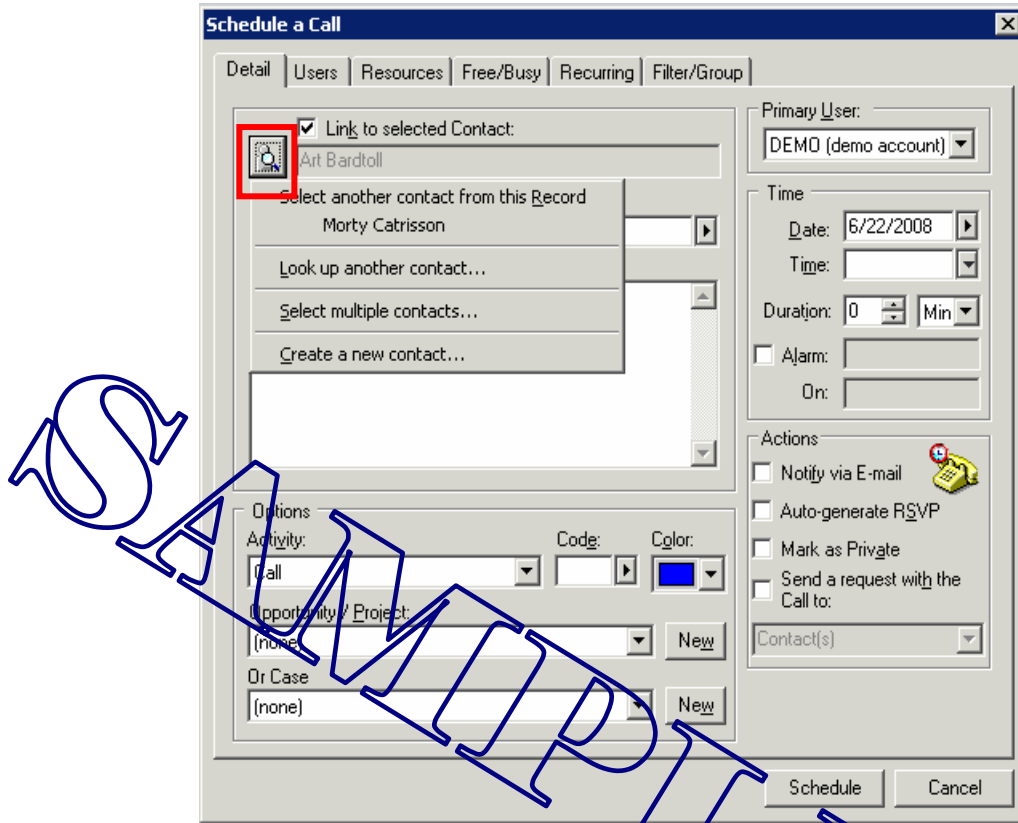


Scheduling an Activity – Schedule a Call (Phone Call)

- The 'Schedule a Call' window will open.
- You will notice that the Primary contact's name is displayed in the Contact field.
- Use the Lookup window in the Reference field to select a short description for the phone call.
- Click the arrow on the Date field to display a graphical calendar to choose the date you want to schedule the call.
- Click the arrow on the Time field to select a specific time, although it's not necessary.
- The Notes section can be used to enter any notes for reminders.
- The Alarm is also optional – the alarm will be set to sound 10 minutes prior to the time of your phone call.
- The other options will be covered in the Intermediate/Advanced guide.
- Click Schedule when finished.



Scheduling an Activity – Schedule a Call (Phone Call)



- If the contact listed in the Contact field of the activity is not correct, click on the magnifying glass and choose 'Look up another contact'.
- Also, if you need to schedule the call with an 'Additional' contact and not the Primary contact, then click on the magnifying glass. The Additional contacts for that record will be listed, as Morty Catrisson is on the example on the right.
- You can also create a new Contact Record on the fly when you are scheduling an activity for a new lead that is not in GoldMine yet.
- The Select Multiple Contacts option is used when you have contacts from multiple contact records involved in a conference call or appointment. Note that there will be a scheduled appointment linked to each contact you select.

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**And Don't Forget...
When in Doubt, *Right-Click!***

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