GoldMine®

Using GoldMine - the Real Estate Edition

By Mark Burrell
The Burrell Group

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Version: GoldMine® 5.0 / GoldMine® Sales and Marketing™

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From the Author

Welcome to GoldMine - the Real Estate Edition!

My name is Mark Burrell and I am a technology consultant to the real estate industry – and “creative-force” behind GoldMine - the Real Estate Edition. As a former real estate broker and ongoing trainer, advisor and “coach” to many real estate professionals, I am keenly aware of the problems, challenges, and needs of the real estate practitioner. As a GoldMine Certified Solutions Partner and user since 1992, I am not only a “fan” of GoldMine; I am a beneficiary of its incredible power and flexibility.

Although I provided the concepts and ideas for these real estate templates, they would not exist without the generous assistance of the GoldMine Division of FrontRange Solutions, particularly Russel Mulock and Richard Kuhlenschmidt to whom I am extremely grateful.

The Real Estate Template for GoldMine 5.0 / GoldMine Sales and Marketing is designed to provide you with a customized "look and feel" to match your real estate business needs. Although the template set provides a different appearance than the standard GoldMine interface, you still have all of the standard features and capabilities of the basic GoldMine.

As you become more familiar with GoldMine - the Real Estate Edition, you may decide you want to customize it further to fit your needs. Although you are not prohibited from doing so, I recommend that you do not try to customize or change the template until you have familiarized yourself with the features and operation.

This User’s Guide is not intended to replace the other GoldMine manuals, documents and resources available, but rather supplement them. It is highly recommended (DO THIS!) that you first review (READ!) the ***GoldMine At-a-Glance*** guide that shipped with your software. What this manual provides is a “game plan” to get you up and running quickly and enable you to get the most out of GoldMine as you become more acquainted with the program.

If you are reviewing the **Demo version** of GoldMine that you downloaded from the FrontRange Web site, you can also download the **electronic version** of the ***GoldMine At-a-Glance*** guide from the FrontRange Web site at the following Web address: http://www.frontrange.com

For your convenience, there is a direct link to this and other useful resources at **The Burrell Group’s Reference Center** for the GoldMine - the Real Estate Edition at: http://www.burrellgroup.com/goldmine-re/

This guide is created as a .PDF file and will require the free Adobe Acrobat Reader program to view. If you do not have this reader installed on you computer, you can download it from: http://www.adobe.com

Once installed on your computer, the *GoldMine At-a-Glance* guide will make an excellent reference guide that you can keep with you on your notebook computer.

GoldMine InfoCenter

GoldMine for Windows has a wonderful feature known as the InfoCenter, where you can store and organize additional information important to your business. The InfoCenter is also used to store more information on GoldMine - the Real Estate Edition. To access this information from the GoldMine Menu bar, select **View**, then **InfoCenter.** Please refer to Chapter 11 – “Share Information” in the ***GoldMine At-a-Glance*** guide for more information on using the InfoCenter.

Additional Author Resources

The Burrell Group also offers additional services for purchase including an expanded GoldMine - the Real Estate Edition User Manual with step-by-step instructions, as well as additional tips, strategies, newsletter, e-mail alerts and coaching services. Additional information and resources regarding GoldMine - the Real Estate Edition can also be found at The Burrell Group Web site at: http://www.burrellgroup.com/goldmine-re/

What to do first

Follow these easy steps to get GoldMine - the Real Estate Edition up and running:

1. Install GoldMine 5.0 / GoldMine Sales and Marketing.

   (Note: if you already have GoldMine 5.0 / GoldMine Sales and Marketing installed, make sure you have the latest maintenance release by using GoldMine's built-in "Update GoldMine" feature. Please refer to the next section, Updating Your Copy of GoldMine, for information on how to download the latest version of GoldMine.

2. Install GoldMine's link to Microsoft Word if you are going to use Microsoft Word for mail-merging with your GoldMine contacts. For information on installing GoldMine's Link to Word, please see section 9-5 of GoldMine's *At-a-Glance* guide.

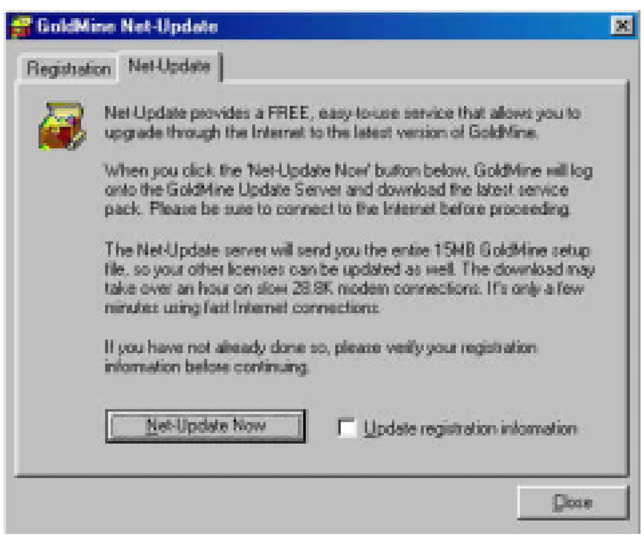
3. Install GoldMine - the Real Estate Edition. Download the file from the following Web site: http://www.goldmine.com/realestateedition

4. **Register at The Burrell Group Real Estate Template Resource Center Web** site at: http://www.burrellgroup.com/goldmine-re. By registering you will be provided some additional free information and content for GoldMine – the Real Estate Edition.

Updating Your Copy of GoldMine

To download the latest version of GoldMine:

From the GoldMine Menu bar mouse-click on "Help" and then select "Update GoldMine." When GoldMine displays the Net-Update dialog window, just click on "Net-Update Now."



GoldMine automatically logs into the GoldMine Update Server, and downloads the latest version of GoldMine, as well as any other files needed to run the new version. To avoid overwriting your currently running copy, GoldMine downloads the file(s) into a subdirectory of your GoldMine root directory, such as:

C:\Program Files\GoldMine\Setup\GoldMine\.

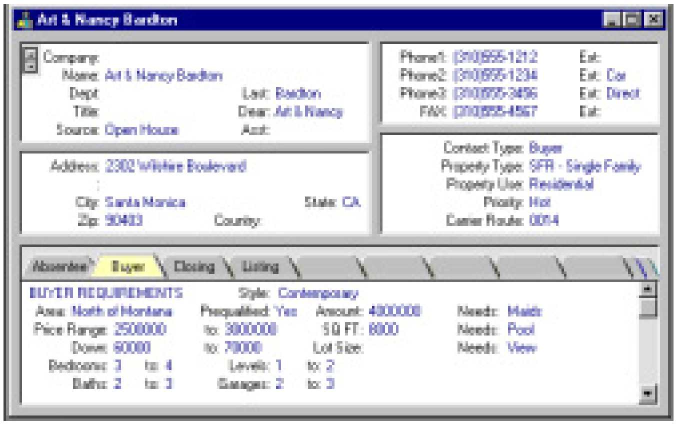
You must connect to your ISP prior to selecting this option to successfully connect to the GoldMine Update Server.

Using GoldMine - the Real Estate Edition

Introduction

GoldMine - the Real Estate Edition gives Real Estate professionals all the power of GoldMine, in a customized version made just for you. In addition to the many features that are standard in GoldMine 5.0 / GoldMine Sales and Marketing, GoldMine - the Real Estate Edition offers the following:

- **Real Estate "Friendly" Terms —** Start using GoldMine immediately! It has been set up just for you.
- **Custom Marketing Tracks —** Automate the Sales and Listing Process using GoldMine's Automated Processes™.
- **Custom Reports —** Print out detailed reports on buyers and sellers using GoldMine's Reports.



In addition, GoldMine's Real Estate Template will allow you to:

- **Track comprehensive relationships between all parties involved in a transaction using GoldMine's Referrals tab.**
- **Forecast and analyze your sales using GoldMine's Forecasting Analysis.**
- **Evaluate your marketing programs using GoldMine's Leads Analysis.**

When you install the GoldMine - the Real Estate Edition, the following areas within GoldMine will have been modified for your use:

- **Key fields and local menus**
- **Fields - User-Defined Field Views**
- **Fields - F2 Lookups**
- **Automated Processes**
- **Reports**
- **Details**
- **Filters**
- **InfoCenter**

Please refer to GoldMine's Online Support at http://www.frontrange.com for further information on using GoldMine.

Quick Overview of GoldMine - the Real Estate Edition

Here’s a quick synopsis of GoldMine 5.0 / GoldMine Sales and Marketing–

GoldMine basically tracks two things:

1. People (Clients and their related information)
2. Activities (things you need to do and their details)

Clients are stored in a contact record and you will schedule activities for those records, including calls, appointments, next actions, etc. You can also perform other activities such as printing letters (merging letter documents or “forms”), printing reports (such as client record information or mailing labels), and sending and receiving e-mail using GoldMine’s built-in e-mail feature.

Client (Contact) Records

Clients include prospects, buyers, sellers, past clients, etc. and their information includes address, phone number, relationship to others, properties etc. This information is stored as part of the client record.

For real estate purposes, you can use GoldMine to track two kinds of client records, People and Property. People records are the personal client information and property records are records that are maintained for specific properties. The benefit of doing this is that you can maintain a client's personal record and property record separately. There will be a history and activity tracker for each client and a separate one for each property.

The relationship between a person and a property is maintained by a "link.” The link may be for an owner or a tenant. Thus, you can have multiple properties assigned to a particular owner, and have one or more tenants linked to a property. If the ownership of the property changes, or a tenant moves in or out, you can account for this by merely linking or unlinking the appropriate people (owner or tenant) and property (residence or rental).

Activity (Calendar) Records

Activities come in two types: pending (scheduled but not yet completed) and history (completed activities). These activities come in different Activity types:

- Appointment
- Calls
- Next Actions
- To-Do
- Events

Activities are generally scheduled against (attached to) a client record. If you use the People and Property record method described in the preceding Client Record section, then you would schedule activities against the Client or Property record as needed.

Entering your first record

The first record you enter into GoldMine should be YOU. This will allow you to schedule activities for yourself that don't necessarily involve another person or company.

Examples:

- Schedule some reading time for study for your broker's license.
- Schedule time to play golf.
- Schedule time to exercise at the gym.

Record Ownership

When records are entered into GoldMine, the GoldMine user who entered the data is the "owner" of the record. This is important to note because when assigning Automated Processes to a particular record, unless otherwise specified in the Automated Process sequence, the GoldMine user assigned to perform the activity is the record owner.

If you want to delegate tasks created in Automated Processes to your assistants or other team members who are users in GoldMine, you will need to edit the particular step within the Automated Process to change the details and assign a different user other then the record owner.

Importing Data

If you need to import data from another program, use the **GoldMine Import Wizard**.

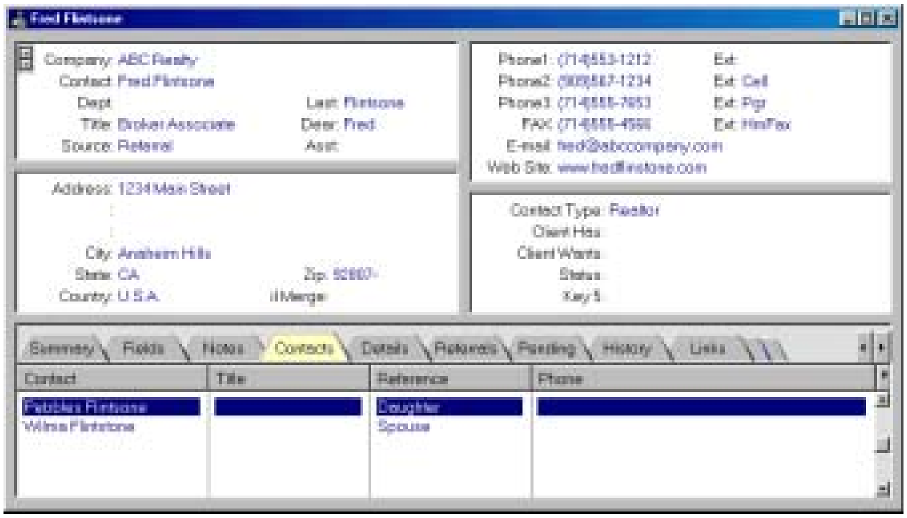
From the **GoldMine Menu** bar, select **Tools** and **Import / Export Wizard**. Select **Import Content Records…**

GoldMine can import data from many data sources and some pre-set import "profiles" are included with GoldMine. Additional import profiles are available on the **FrontRange Web site** (www.frontrange.com) or **The Burrell Group Real Estate Template Resource Center (**www.burrellgroup.com/goldmine-re**).**

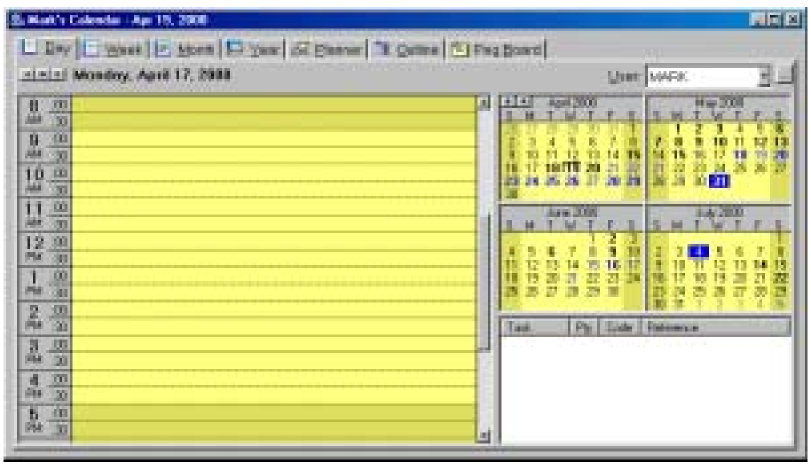
For more information or assistance in converting or importing records from a particular program, you may contact a GoldMine Solutions Partner or inquire at the Real Estate Resource Center on The Burrell Group Web site.

You can view GoldMine information in 3 different “Views”: **Record**, **Calendar** and **Activity List.**

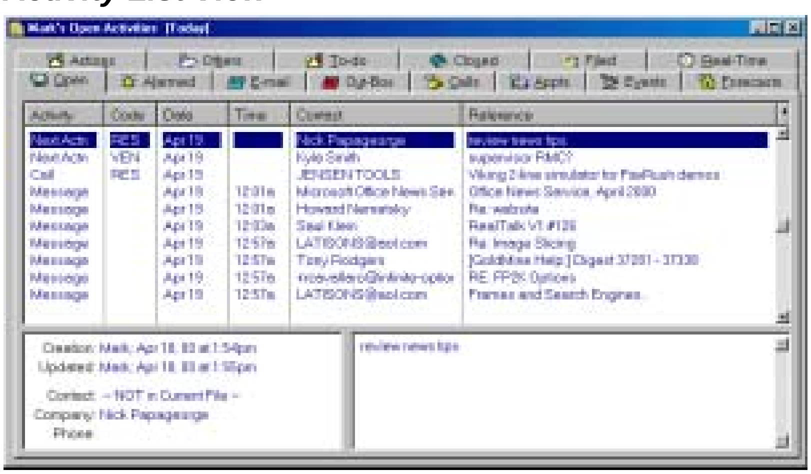
Record View



Calendar View



Activity List View



Key fields

GoldMine's Key fields are all indexed in order to provide the quickest search method for GoldMine's most frequently accessed contact information. GoldMine - the Real Estate Edition renames the Key fields in GoldMine.

Following is a brief explanation of these Key fields:

Contact Type

The **Contact Type** refers to whether a contact is a buyer, seller, agent, prospect, vendor, etc. Several predefined Contact Type values have been added to the **Contact Type** F2 Lookup. By using this field, you can easily track and manage all contacts of a particular type.

An F2 lookup is a special type of browse window that pops up from a field when you press the F2 key or when you right click in the appropriate field window.

Priority

The **Priority** field allows you to prioritize your clients. You can easily pull up a list of all your HOT contacts.

Street Name

The **Street Name** field will automatically take the street name from the Address field in the mailing address section of the screen and place it here. By using this field, you can easily search all contacts by Street Name.

Client Has

The **Client Has** field refers to what type of property a seller client currently owns. By using 'rule-of-thumb' codes, you can enter multiple information items in this one field. Example: If a client has a three bedroom, two bathroom home with 1,500 square feet of living space, you can enter, "3-2-1500" in this field. By doing this for each client, you can quickly search and sort by what clients "have" to match against a buyer's needs.

Client Wants

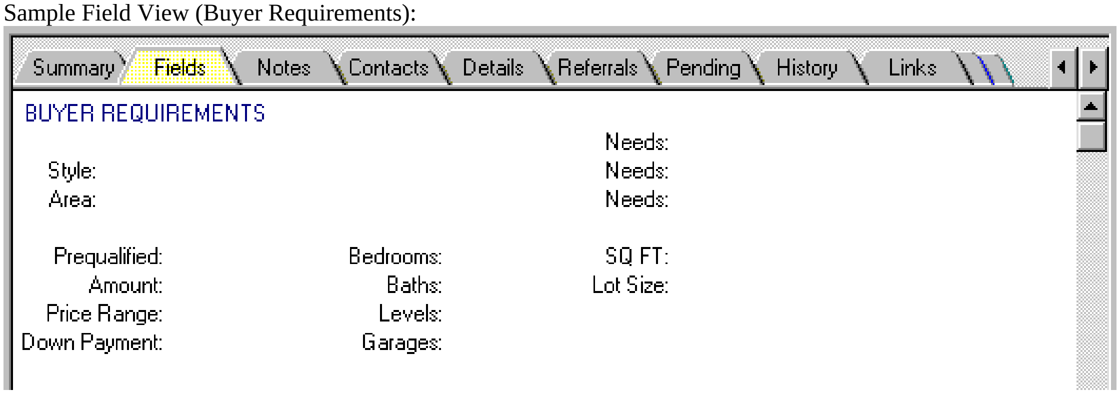
The **Client Wants** field refers to what type of property the buyer client wants. By using 'rule-of-thumb' codes, you can enter multiple information items in this one field. Example: If a client has a three bedroom, two bathroom home with 1,500 square feet of living space, you can enter, "3-2-1500" in this field. By doing this for each client, you can quickly search and sort by what a client "wants" to match against a property listing that you have.

Custom Fields & Screens - User-Defined Field Views

With GoldMine, you can create and add an almost unlimited number of custom, user-defined fields to the database. These fields are maintained and accessed directly from the **Fields** folder in the first row of tabs in the lower section of the contact record. To access the different field "views" from under the Fields tab, right click under the Fields tab to display the pop-up local menu listing the different screen views. (See figure on next page.)

You can also create your own custom tabs, which are located in the third and fourth bank of tabs of the contact record. To change to a different bank of tabs, click on the right side of the tab bank.

Sample Field View (Buyer Requirements):



The tab folder can be resized to display more information at a glance. To enlarge the tab folder panel:

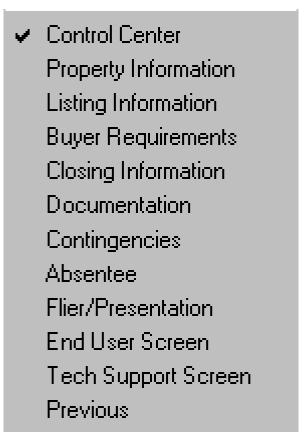
1. Position the mouse over the lower edge of the panel.

2. Hold down the mouse button, then drag the separator downward.

3. When the panel appears at the desired size, release the mouse.

These tabbed folders allow you to track and display an extensive variety and amount of information about your clients.

GoldMine - the Real Estate Edition also includes the following custom views:



You can access these custom views by clicking the right-mouse button under the Field tab area to display the pop-up local menu on the right that you see above. These Fields can also be accessed by clicking on the third bank of tabs in the lower part of the contact record.

GoldMine reports are available for each of these field views. These reports can be accessed from the GoldMine Reports menu.

Absentee Owner Information

The **Absentee Owner Information** view provides fields for inputting absentee owner name, address and phone numbers.

Buyer Information

The **Buyer Information** view contains extensive information on a buyer's requirements including buyer wants, needs, price range, location, etc.

Closing Information

The **Closing Information** view contains vital information required during a real estate transaction such as Escrow, Insurance, Lender, Title information, etc.

Listing Information

The **Listing Information** view contains extensive information about a particular listing, such as property description, school information and terms.

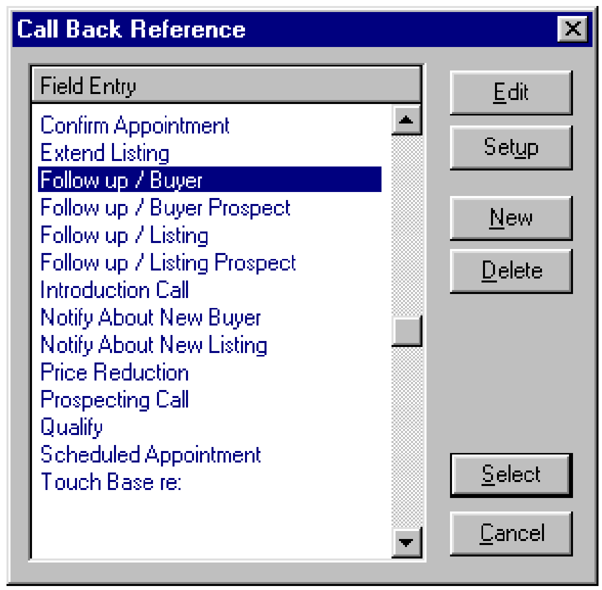
In order for these custom fields to work properly, **Select contents of field** must be checked in GoldMine **Preferences.** To do this:

1. From GoldMine's Main Menu, select **Edit|Preferences**.
2. Select the **Record** tab.
3. Select **Select contents of fields**.

Fields - F2 Lookups

GoldMine allows you to schedule and complete activity information — detailed, time-specific, or event-based data, such as calls, appointments or letters — relating to a particular GoldMine user or GoldMine contact.

Scheduled activities can be **Calls, Next Actions, Appointments, Other Actions, To-Dos** or **Events**.
On the right is an example of the F2 lookup field for the "Reference" field for the Scheduled Activity →



GoldMine – the Real Estate Edition has predefined F2 lookups associated with the following Activity Types:

- **Calls**
- **Appointments**
- **Other Actions**
- **Next Actions**

As a matter of practice, it is best to use these different activity types to describe your daily work. For example, use **Next Actions** to refer to transactional (i.e. listing or closing) activities and **Other Actions** for marketing (i.e. advertising) activities.

Each Activity Type has its own dialog box. Please note the following fields within the dialog box:

The **Code** field specifies the activity type of a scheduled activity. The lookup includes codes for Listing, Marketing, Personal, etc. It is important to use these codes consistently, since they can be used later to generate reports or filters and groups, which can be used in targeted mailing campaigns. (See Page 5-6 in *GoldMine At-a-Glance* guide regarding Activity Code.

The **Reference** field contains a description of the activity.

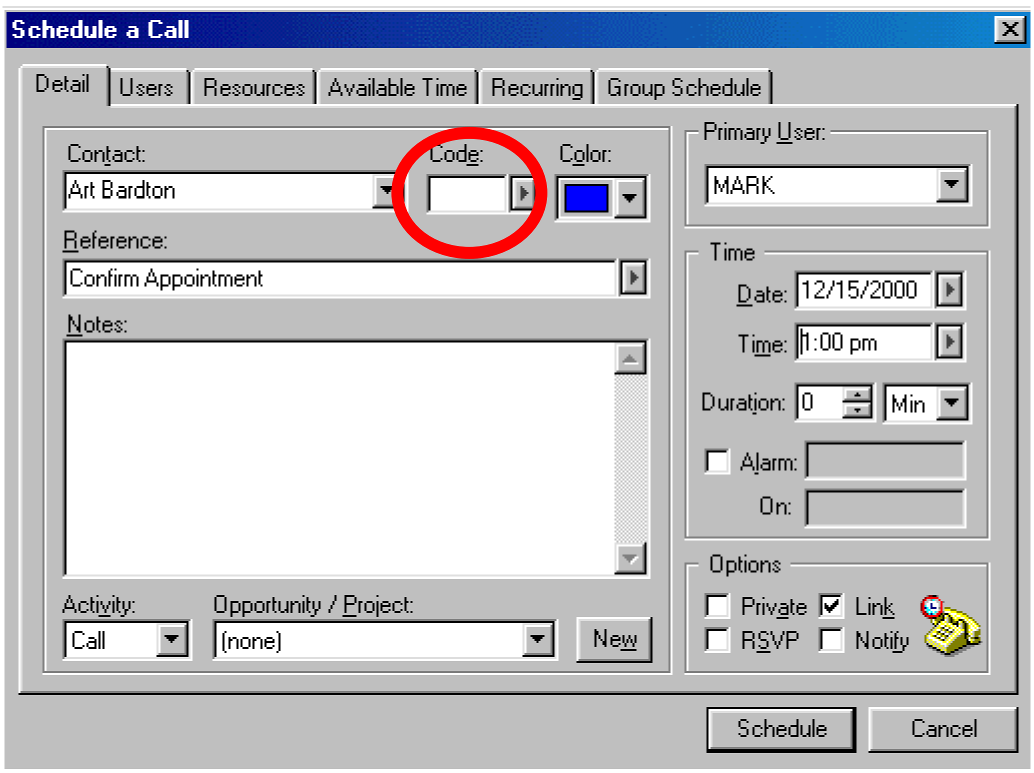
Scheduling Activities

Refer to the *GoldMine At-a-Glance* guide, "Chapter 5 – Schedule Activities", for details on scheduling activities.

GoldMine – the Real Estate Edition has some category reports that look for specific activity codes to determine what items to include in the report. The activity codes for specific reports are:

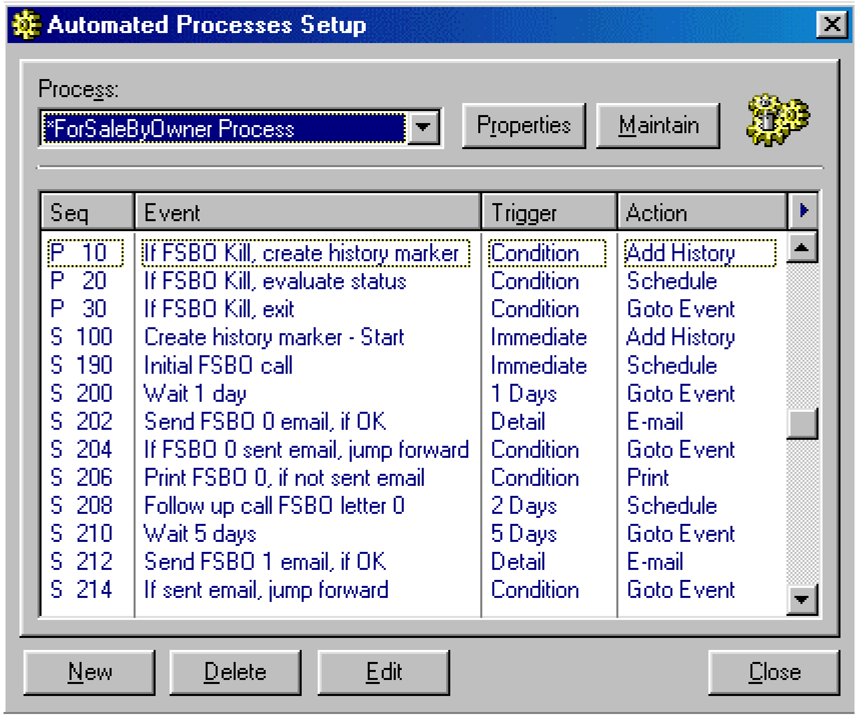
Activity Code	Report Category
ADM	Administrative, Broker or Agent Reports (not for clients)
BYR	Buyer Reports for clients
EXP	Expired Listings
FSB	For Sale By Owner
LST	Listing Activities
MKT	Marketing Activities
PRO	Prospecting
SHW	Showing (Property) Reports
SLR	Seller Activities
TRX	Transaction Activities (In Escrow, Sales In Process, etc)

By consistently entering **activity codes** that match the activity type, you can use GoldMine reports to print lists of these reports by Activity Code. You can also create your own "codes" and than change the "filters" setting on any report to print those activities in the report.



Automated Processes™

GoldMine's Automated Processes (AP's) take the work out of sales by automating many of the repetitive tasks required to close the sales. Using Automated Processes, you can set up GoldMine to perform administrative and tracking duties such as managing leads, generating direct mail and validating data. Automated Processes are one of the most powerful features of GoldMine – the Real Estate Edition.



GoldMine – the Real Estate Edition contains prewritten Automated Processes for real estate. Some are examples that can provide an "idea" template for the user for personal creation and customization. (see note below* * *)

Provided AP's include:

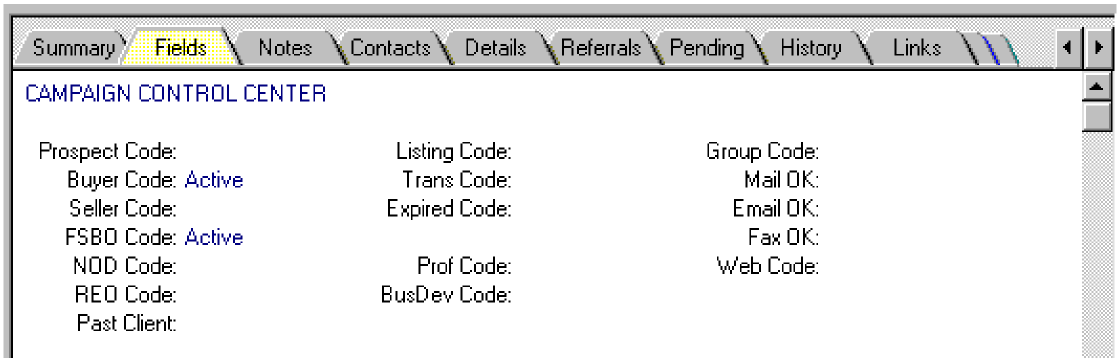
- **Master** – a process that automatically assigns and removes other processes as needed
- **New Listing -** a checklist of activities needed to successfully market a new listing
- **Transaction Closing Checklist -** a checklist of activities needed to successfully close a sale
- **Buyer Offer Submitted** – a checklist of activities needed when you have an offer accepted for a buyer
- **Buyer Auto Process** – a checklist to remind you to follow up on activities for a buyer client
- **Buyer Open House** – a checklist to follow up on a buyer who visited an open house
- **Expired Campaign** – a checklist of activities to keep you in touch with the owner of an expired listing
- **For Sale By Owner** – a checklist to help you follow up with a homeowner trying to sell "By Owner"
- **Past Client Follow up** – a contact plan to keep you in touch with past clients to obtain referrals
- **Real Estate Assistant Review and Support** – a campaign to help you manage your assistants
- **Office Systems Review** – a checklist of reminders to keep you up to date on administrative tasks
- **Personal Growth, Education and Skills Development** – designed to keep you moving forward in these areas

In the Processes Listing window, the asterisks (*) are used to denote the AP's that are specific to GoldMine – the Real Estate Edition.

* * * Although all processes can be edited and customized by the GoldMine user, it is recommended that you first CLONE the process before editing to keep a backup copy of the original. (You can clone a process by clicking the right-mouse button while pointing at the process name from the Processes Listing window, and selecting clone.)

Master Campaign Automated Process

The **Master Campaign** works with the **Campaign Control Center** screen (under the Fields Tab) in helping assign and remove other campaigns.



If you assign the Master Campaign to a contact record, and then change the value to "Active" for a campaign code in the Campaign Control Center, the Master Campaign will assign the activated campaign for that contact record.

To remove a particular process from a contact, change the value to Kill in the Control Center.

To assign the Master Campaign to a contact, go to the GoldMine Menu Bar and choose Contact, then Assign a Process and select Master from the list of Automated Processes.

To have the Master Campaign assigned to all new records you enter automatically, you can edit the default settings for the Master Campaign as follows:

From the GoldMine Menu Bar, select:

Tools | Automated Processes | Set up Automated Processes

Click on the Maintain button, and highlight *Master Start Track from the Processes Listing window, and click the Properties button.

From the Process Properties window, make sure the "Attach this process to all new contact records" box is checked.

NOTE: If you assign the Master Process to all new records, it will only affect that record if you change values in the Campaign Control Center screen. It will not affect other records.

Editing Automated Processes

Although all Automated Processes can be edited and customized by the GoldMine user, it is recommended that you first ***clone*** the process before editing to keep a backup copy of the original. (You can clone an Automated

Process by clicking the right-mouse button while pointing at the process name from the Processes Listing window, and selecting clone).

Automated Processes are simple in concept, but can be quite detailed and advanced in their implementation. A GoldMine user can easily set up a simple sequential Automated Process. However more complex processes involving branching and logical references can be more than a novice user can handle.

Therefore, it is recommended that unless you are willing to study Automated Processes and have the requisite skills to take on this endeavor, you contact a GoldMine Solutions Partner to help with this process.

To access GoldMine's **Automated Processes**:

1. From the Main Menu, select **Tools | Automated Processes | Set up Processes**
2. Select the Process from the drop-down box in the **Process:** window

For additional information on creating and using GoldMine's Automated Processes, please refer to GoldMine's Online Support at http://www.frontrange.com.

InfoCenter

GoldMine's InfoCenter provides a resource for maintaining any type of information useful to an organization or an individual. Just as information is not limited to text files, the InfoCenter can archive any information, including graphics, multimedia files, and program applications. Any of this information can then be linked to a contact record, so that GoldMine displays the record automatically whenever you access that topic.

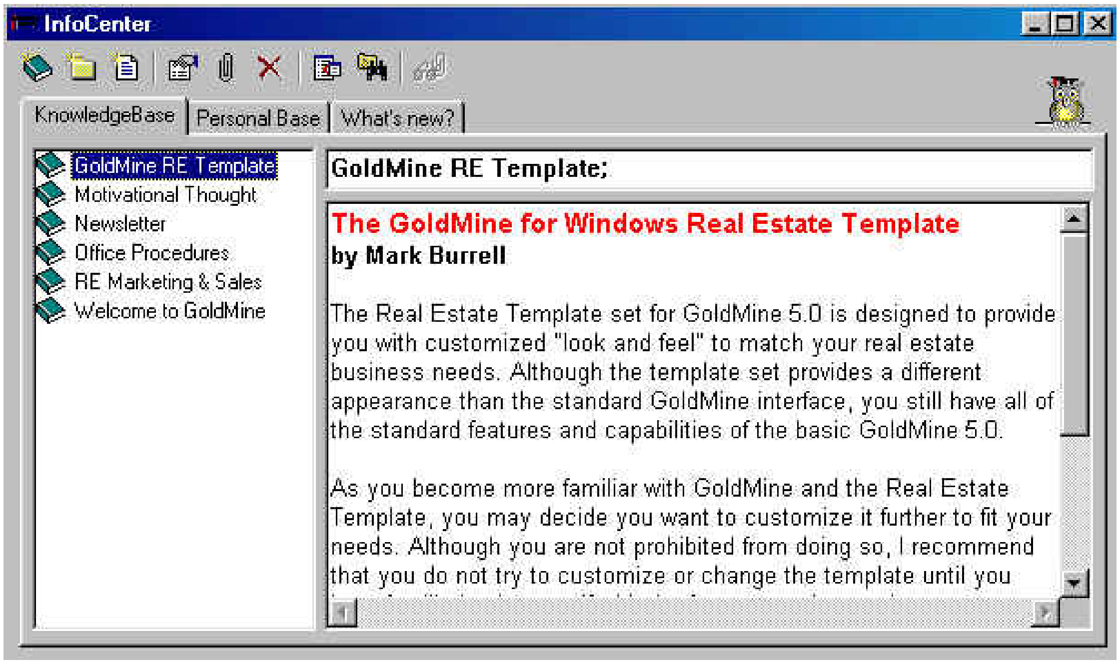
The InfoCenter runs independently within GoldMine. You can keep the InfoCenter open while you work in GoldMine, using this "desktop" reference whenever needed.

The InfoCenter consists of three separate online resources:

- **KnowledgeBase**: maintains information created by, for, and about an organization.
- **Personal Base**: maintains information useful to an individual user that only the user can view and update.
- **What's new?**: presents KnowledgeBase items in reverse chronological order.

The KnowledgeBase and the Personal Base organize topic pages, which are items of related information, in a hierarchical structure similar to an outline format. You can quickly find information by navigating through different sections or by conducting a search. You can even open a linked file that was created by another application, such as a document, bitmap graphic, multimedia file, or a program application.

GoldMine – the Real Estate Edition provides additional information and help in the InfoCenter under the topic, **GoldMine RE Template**.

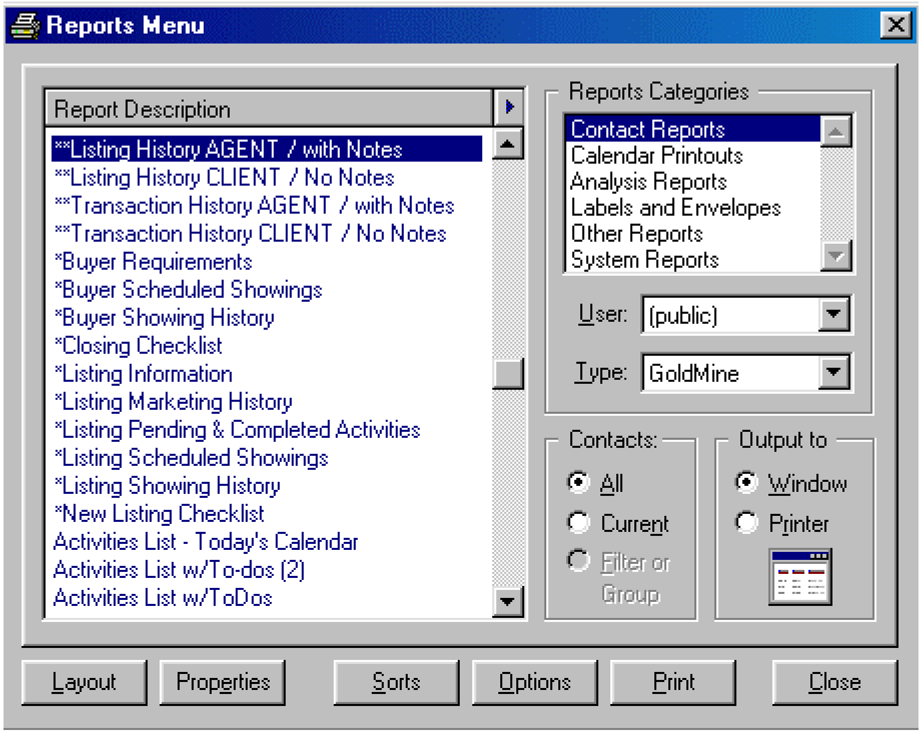


Reports

GoldMine's powerful reporting capabilities let you generate reports from the data in your contact database. GoldMine includes a set of over 50 pre-configured report layouts to organize data for a variety of needs.

GoldMine – the Real Estate Edition includes some real estate specific reports in addition to the default reports that come with GoldMine 5.0 / GoldMine Sales and Marketing. All reports can be cloned and modified, and additional reports can be created using the GoldMine Report Writer. Please refer to the *GoldMine At-a-Glance* guide, Chapter 10 - "Run Reports" for more information on GoldMine reports.

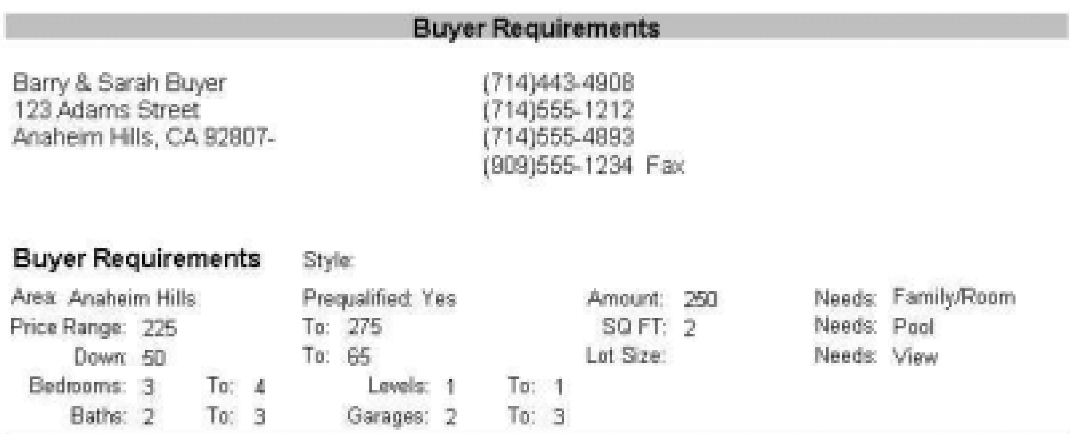
Note: It is recommended that the GoldMine user enter a sample client record with complete data entry on all custom screens and then print a sample of each report. When printing the report, you have an option to Output to Printer or Window. Selecting window will allow you to view the report on screen.



GoldMine – the Real Estate Edition continues the following pre-configured reports:

Buyer Requirements

The **Buyer Requirements** report will create a report based on information that is stored in the **Buyer Information** view. This report can be useful when preparing to preview property for a prospective buyer.



Buyer Requirements

Barry & Sarah Buyer
123 Adams Street
Anaheim Hills, CA 92807-

(714)443-4908
(714)555-1212
(714)555-4893
(909)555-1234 Fax

Buyer Requirements Style:

Area: Anaheim Hills
Price Range: 225 To: 275
Down: 50 To: 65
Bedrooms: 3 To: 4
Baths: 2 To: 3
Prequalified: Yes
Amount: 250
SQ FT: 2
Lot Size:
Levels: 1 To: 1
Garages: 2 To: 3
Needs: Family/Room
Needs: Pool
Needs: View

Buyer Scheduled Showings

The **Buyer Scheduled Showings** will create a report of all pending **Next Actions** that have the **SHW** value in the **Code** field. This report can be useful to show a prospective buyer the showing appointments that have been scheduled.

Buyer Scheduled Showings

Barry & Sarah Buyer	(714)443-4908
123 Adams Street	(714)555-1212
Anaheim Hills, CA 92807-	(714)555-4893
	(909)555-1234 Fax

User	Time	Date	Activity Code	Reference
MARK		10/19/00	SHW	Show Property
MARK		10/21/00	SHW	Show Property
MARK		10/24/00	SHW	Show Property

Buyer Showing History

The **Buyer Showing History** report will create a report of all completed **Next Actions** that have the **SHW** value in the **Code** field. This report can be useful to show a buyer a list of the properties that they have seen.

Closing / Transaction Checklist

The **Closing Checklist** report will create a report of all the information that is stored in the **Closing Information** view and all the scheduled and completed **Next Actions** that have the **TRX** value in the **Code** field. This report works in concert with the **Closing Checklist** Automated Process.

Listing Information

The **Listing Information** report will create a report based on information that is stored in the **Listing Information** view. This report can provide a quick snapshot of vital information on a particular listing.

Listing History

The **Listing History** report will create a report of all scheduled and completed **Actions** that have the **LST** value in the **Code** field. This report can be useful to demonstrate the activity that has transpired for a particular property. This report comes in two versions, "**Agent / With Notes**", and "**Client / No Notes**". The difference is that the Agent Report prints the notes of each activity in the report, and the Client reports omits those notes. This allows the activity notes area to be used for in-house comments about the activity (example, "Showing agent commented that the seller was not cooperative during the showing") to maintain an accurate history, but not show this information in the report to the seller.

Listing Pending & Completed Activities Report

123 Adams Street
121-098-903-2903

Seller: John and Sally Seller

123 Adams Street	(714)555-1213 Owner
121-098-903-2903	(714)555-1212
123 Adams Street	(714)555-4893
Anaheim Hills, CA 92807-	(909)555-1234 Fax

Pending Activities

Date	Time	Activity	User	Code	Reference
10/12/00		Appt.	MARK	SHW	Show Property TBG
10/17/00		Appt.	MARK	SHW	John Smith / ABC Realty
10/20/00		Appt.	MARK	SHW	TBG Showing
10/24/00		Appt.	MARK	SHW	Show Property Broker
10/24/00		Appt.	MARK	SHW	Show Property - Open House
10/24/00		Other	MARK	LST	Multiple Listing

Listing Marketing History

The **Listing Marketing History** report will create a report of all completed **Other Actions** that have the **MKT** value in the **Code** field. This report can be useful to demonstrate the marketing activity that has transpired for a particular property.

Listing Scheduled Showings

The **Listing Scheduled Showings** will create a report of all pending **Next Actions** that have the **SHW** value in the **Code** field. This report can be useful to show the schedule of pending showing appointments for a listed property.

Listing Showing History

The **Listing Showing History** report will create a report of all completed **Next Actions** that use the **SHW** code in the **Code** field. This report can be useful to show the number of times a listed property has been shown to prospective buyers.

Mailing Labels - Avery 5160 with Carrier Route

The **Avery 5160 with CR** report will create mailing labels that include the addressee's carrier route number. This report can be used for bulk mailing. Contact your local Postal Service for more details. (Note: This report requires that the carrier route number be stored in the Carrier Route (Key 5) field.)

Accessing GoldMine's **Reports Menu** is the first step to generating a report.

1. From the Main Menu, select **File|Print Reports**.
2. In the **Report Categories** section, highlight the report type that you want to generate, such as **Contact Reports**.
3. In the **Report Description** section, select the specific report that you want to generate, such as **Contact Profile (Detailed).**

The reports specific to this template are marked with an * and are located in either the **Contact Reports** or **Labels and Envelopes** report categories.

Details

GoldMine's **Details** let you store specific information about a contact such as birth date or Internet address. This information is indexed so that you can quickly and easily perform a search based on a Detail. GoldMine's expanded Details provide additional fields to store more details on a particular Detail. GoldMine's Details can be attached to a contact record on an "as-needed" basis.

The GoldMine Real Estate template contains the following Details:

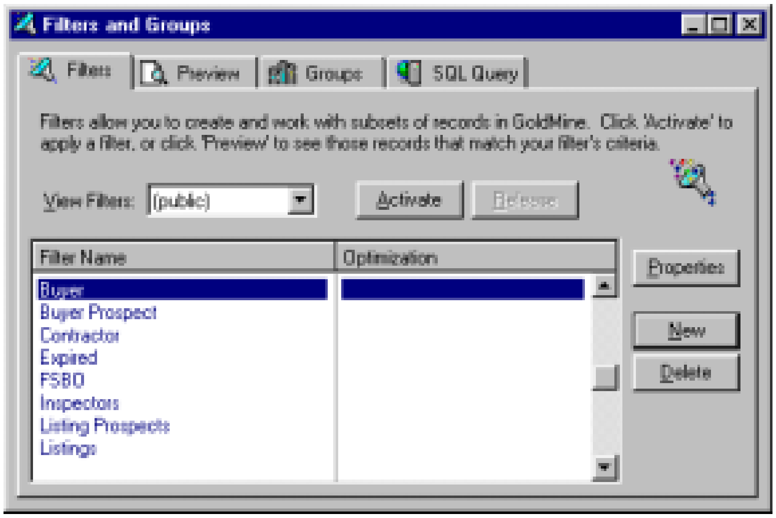
- **Title Company**
- **Insurance Company**

To access GoldMine's **Details,** select the **Details** tab in the lower portion of the contact record. The **Details** folder browse window will open.

Filters and Groups

Once you have a large number of records in your database, you can separate them into different subsets. You can select the criteria on which you want to categorize some records to be used as subjects of special activities. For example, you can create a subset of all Buyer Prospects within your database.

GoldMine provides two methods for managing data subsets: **filters** and **groups**. Filters are dynamic. Membership to a filter changes as the database changes. Groups are static, once created, the membership is fixed. Groups process information faster than filters because the record evaluation is performed only once.



The GoldMine Real Estate template contains 11 predefined filters. The following filters are include:

- **Buyer**
- **Buyer Prospect**
- **Contractor**
- **Expired**
- **FSBO**
- **Inspectors**
- **Listing Prospects**
- **Listings**
- **Personal**
- **Realtor**
- **Tenant**

You can later use these filters to create groups for advanced sorting and manipulation.

To access GoldMine's **Filters**:

1. From the Main Menu, select **View|Contact Groups**.

2. Select the **Filters** tab to view existing filters.

To view these filters make sure **(public)** is selected in the **View Filters** window.

For additional information on creating and using GoldMine's Filters and Groups, please refer to GoldMine's Online Support at http://www.frontrange.com.

How do I…

How do I…

The following scenarios explore the some of the many possibilities that can result by using GoldMine – the Real Estate Edition. By modifying the scenarios below, you will be able to take advantage of the many functions made possible by installing this template.

Grouping Contacts - Groups & Filters

… build a group of all Buyer Prospects in my database?

The ability to build groups is one of the most powerful features in GoldMine. Using the predefined filters that come with the GoldMine Real Estate template, you can easily build groups based on any number of criteria.

1. From the Main Menu, select **View|Contact Groups**.
2. Place the mouse pointer in the **Groups** window. Right-click in the white area under Group Name to bring up the local menu and choose **New…**
3. Type in a name for the group in the **Group Name** box.
4. Make sure the **Build the group** box is checked.
5. Click on **OK.**
6. The **Group Building Wizard** window will appear.
7. Select **Filtered records.**
8. Click on **Next.**
9. Select **Build on a filter.**
10. To view these filters make sure **(public)** is selected in the **Owner** window.
11. Select **Buyer Contacts** from the drop-down box.
12. Click on **Next.**
13. Click on **Next.**
14. Click on **Finish.**

The group and members will appear in the **Groups** tab in the **Filters and Groups** window.

… send a letter to all members of my Buyer Prospect group?

GoldMine can use **Groups** to produce mass mailings.

1. From the Main Menu, select **Contact|Write|Mail Merge…**
2. Highlight the **Document Type** you want to select from.
3. Highlight the **Template** you want to merge.

4. Select the **Recipient** tab.
5. From the Contact Selection subheading, select **All contacts in the following filter or group**.
6. Select the group/filter that you would like to use.
7. From the Delivery subheading, select **Printer** or **Fax**.
8. Click **OK**.

GoldMine will merge the contact information and print or fax the form for all members of the group.

Letters - Merge Forms

… send a custom letter to one of my contacts?

1. Open up the contact record in GoldMine.
2. From the Main Menu, select **Contact|Write|Mail Merge…**
3. Highlight the **Document Type** you want to select from.
4. Highlight the **Template** you want to merge.
5. Select the **Recipient** tab.
6. From the Contact Selection subheading, select **This contact**.
7. From the Delivery subheading, select **Printer** or **Fax**.
8. Click **OK**.

… link this letter to the contact record so I can retrieve it later for review?

1. Select the **Links** tab in the contact record to which you want to link a file.
2. Right-click for the local menu, then select **New**.
3. Type a **Document Name** to describe the linked document.
4. To designate another user as the **Document Owner**, select a name from the drop-down list.
5. Type **Notes** to add details about the document.
6. Specify the path and **File Name** of the file that you want to link to the contact record. To navigate through your system to find a file, click the … icon.
7. To exclude the linked document from a transfer set for remote synchronization, uncheck **Allow file to synchronize**.
8. Select **OK**.

Automate My Business - Automated Processes

… schedule all the activities that need to be completed for my new listing?

First, attach the Process to the contact record.

1. From the Main Menu, select **Tools|Automated Processes|Execute Processes.**
2. Highlight **Scan Current Contact.**
3. Select **Scan Once.**
4. Select **Attach Track to Selected Contacts**.
5. Select **Listing (Just Listed)**.
6. Click on **Process**.
7. The **New Listing Checklist** Automated Process has now been attached to this contact record.

A series of scheduled activities will be attached to this contact record.

… print out a report of this checklist to take with me?

1. Open up the buyer's contact record in GoldMine.
2. From the Main Menu, select **File|Print Reports**.
3. Highlight the **New Listing Checklist** report.
4. Select **Current.**
5. Click on **Print.**

… attach the Closing Checklist Automated Process to pre-schedule all of the activities that need to be completed in order to assure the successful closing of my seller's home?

1. From the Main Menu, select **Tools|Automated Processes|Execute Processes.**
2. Highlight **Scan Current Contact.**
3. Select **Scan Once.**
4. Select **Attach Track to Selected Contacts.**
5. Select **Transaction Checklist.**
6. Click on **Process.**
7. The **Closing Checklist Automated Process** has now been attached to this contact record**.**

A series of scheduled activities will be attached to this contact record.

… print out this checklist to take with me?.

1. Open up the buyer's contact record in GoldMine.
2. From the Main Menu, select **File|Print Reports**.

3. Highlight the **Closing Checklist** report.

4. Select **Current.**

5. Click on **Print.**

Reports

… print out a list of my buyer's requirements to take with me in the field?

1. Open up the buyer's contact record in GoldMine.

2. From the Main Menu, select **File|Print Reports**.

3. Highlight the **Buyer Requirements** report.

4. Select **Current.**

5. Click on **Print.**

Linking Contacts - The Referrals Tab

… link all the parties that are involved with a property — such as buyers, lenders, appraisers, contractors, etc. — for quick and easy access?

By using the Referrals tab you can link different contacts together in GoldMine.

1. Open the contact record you wish to link with other contact records.

2. Click on the **Referrals** tab.

3. Right-click in the white space under the **Referrals** tab to bring up the local menu.

4. Select **New….**

5. Type in the name of the company or contact that you want to link to.

6. Double-click on the contact you want to link.

7. This will bring up the **Referral Properties** window.

8. Fill in appropriate **Reference** labels and **Insert Notes:**.

9. Highlight the reference type.

10. Click on **OK.**

11. Double-clicking on the name in the Referrals tab will bring up the linked record.

Sales Forecasting

… project how much money in commissions I will be generating in the upcoming months?

When a property is sold, you can record your commission using GoldMine's **Forecasted Sale** feature and get a snapshot of your projected earnings by using GoldMine's **Forecast Analysis…** feature.

First, you must enter a sale.

1. Open up the contact record in GoldMine.
2. From the Main Menu, select **Schedule|Forecasted Sale…**
3. The **Schedule a Forecasted Sale** window will appear.
4. Make sure your name appears in the **User** box.
5. Type in the property address in the **Product** box.
6. Enter your commission amount in the **Amount** box.
7. Enter 100 in the **Probability** box.
8. Enter an activity type in the **Code** box.
9. Enter the **Sale Date.**
10. Select **OK.**

You can now run GoldMine's **Forecast Analysis**

1. From the Main Menu, select **View|Analysis|Forecast Analysis…**
2. If your name is not in the **Analyze Users** window, Click on **Select User(s).**
3. Double click on your name.
4. Click on **OK.**
5. Click on **Analyze.**

Leads Analysis

… know how many of my prospects came as a result of my newspapers ads?

You can build an analysis of this information by using GoldMine's Leads Analysis function.
In order for this to work properly, you must store source information in the **Source** field in the main contact screen. GoldMine's Real Estate Template comes with several predefined lookups.

1. From the Main Menu, select **View|Analysis|Leads Analysis**.
2. Select **New.**
3. Type in a description for this Analysis, (for our example type in Mailing).
4. Type in a file name (for our example type in Mailing).
5. Click on **OK.**
6. Click on **OK** again.
7. Click on **Analyze.**
8. Type in Source in the **Base Analysis On** box.
9. Select a Date Range.

10. Click on **Analyze.**

11. The **Leads Analysis** screen will appear with the newly created analysis.

12. Select a field to **Base Analysis On**.

13. Select a **Date Range**.

14. Click on **Analyze**.