

Procedure for entering activities in Goldmine Calendar

1. Open a new 'task' entry screen by using the pull-down menu next to the paperclip or other methods.
2. Select the activity type as:
 - a. Appointment: Used for meetings & customer visits.
 - b. Event: A day-long activity such as travel or vacation day
 - c. Other: I haven't come up with a reason to use this (time-based events)
 - d. All other activity types won't show up on the final calendar
3. Next to the activity type, use the 'Code' pull-down to select an appropriate activity description.
4. Uncheck the "link to selected contact" box (unless it is a meeting with that client in GM that you are scheduling)
5. For events, select the starting date and duration of days on the right-hand side.
For appointments, select the date and the duration in hours or minutes.
6. Change the "primary user", if necessary, to reflect who the activity is for. If multiple "users", go to the second tab to select additional people.
7. On the reference line, start by listing the owner's name or initials (keep it short), then a brief description of the activity. Short is better. *This is what shows up on the calendar printout!*
8. Additional reference info may be added in the notes section. If traveling, it would be nice to have your cell-phone number here. *This won't show up on the printout, but can be seen in GM.*
9. If this is a recurring event, such as a weekly meeting, use the 'recurring' tab to automatically fill out the calendar.
10. Click the 'schedule' button to finalize.

If you need to change a calendar activity, right-click on the activity and select 'edit' or 'delete'.

Printing the Calendar using Sunbird

1. Manually create an updated .ics file from GM by Tools>>Publish Calendars>>Publish Calendars, then select 'okay' button.
2. If the calendar .ics file has been changed since Sunbird was opened, simply close-and-open Sunbird to refresh.
3. Navigate to the month you want to print.
4. Press ctrl-P or select File>>Print Active Calendars
5. Type in a title for the calendar: "Sales Schedule"
6. After previewing, click "Print"

Schedule an Event

Detail | Users | Resources | Free/Busy | Recurring | Filter/Group

Contact:

Reference:

Notes:

Options

Activity: Code: Opportunity / Project:

Color: Mark as Private Link to selected contact

Primary User:


Time

Date: Through:

Duration:

Alarm: On:

Actions

Notify via E-mail 

Auto-generate RSVP

Send a request with the Event to:

Schedule an Appointment

Detail | Users | Resources | Free/Busy | Recurring | Filter/Group

Contact:

Reference:

Notes:

Options

Activity: Code: Opportunity / Project:

Color: Mark as Private Link to selected contact

Primary User:


Time

Date: Time:

Duration:

Alarm: On:

Actions

Notify via E-mail 

Auto-generate RSVP

Send a request with the Appt. to:

Configuring for exporting & viewing Goldmine Calendar with Sunbird

1. Install Sunbird software. http://www.mozilla.org/projects/calendar/sunbird_download.html
2. Use File>>Open Calendar to link to L:/calendar/sales.ics file in Sunbird
3. Use File>>Open Calendar to link to L:/calendar/us32holidays.ics file
4. Manually create an updated .ics file from GM by Tools>>Publish Calendars>>Publish Calendars, then select 'okay' button.
5. In the future, the .ics file will automatically be updated a couple times each day.

Printing the Calendar using Sunbird

7. Manually create an updated .ics file from GM by Tools>>Publish Calendars>>Publish Calendars, then select 'okay' button.
8. If the calendar .ics file has been changed since Sunbird was opened, simply close-and-open Sunbird to refresh.
9. Navigate to the month you want to print.
10. Press ctrl-P or select File>>Print Active Calendars
11. Type in a title for the calendar: "Sales Schedule"
12. After previewing, click "Print"