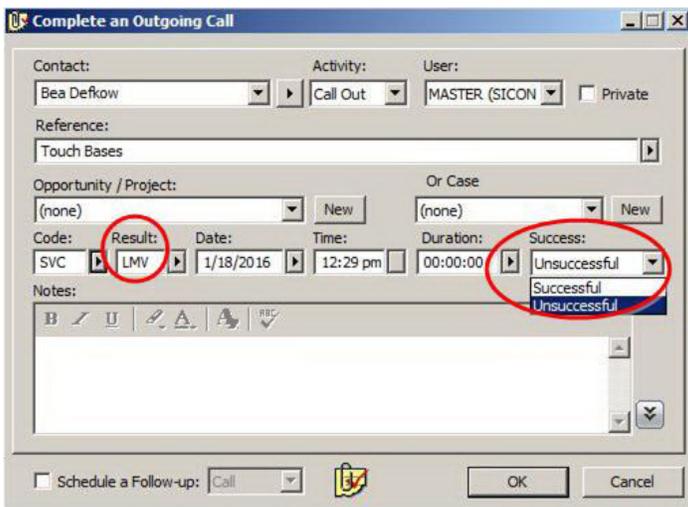


GoldMine: How To...

Record Activity Success

When completing an activity in GoldMine, there are two fields that are often neglected but provide additional information that can be very useful. For the purpose of illustration, I am going to use the completion of an outgoing call as an example.

Here is the completion screen from GoldMine. Notice that I have circled the "Result:" and "Success:" fields.



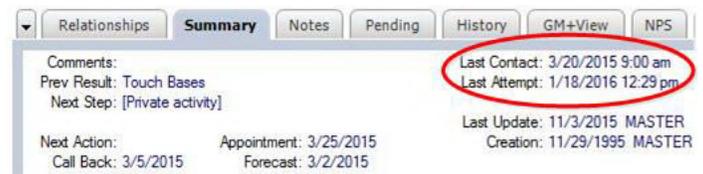
Result: I like to use this field to record the outcome of the call. In the example above, I put in LMV to indicate that I left a voicemail. This is a simple informational entry that is very useful when looking at history.

Date	Time	Contact	User	Activity	Code	Result	Reference
1/18/2016	12:29 pm	Bea Defkow	MASTER (SIC...	Call Out	SVC	LMV	Touch Bases

I've circled the result as it appears in the history tab. I can easily see that I left a voicemail for the contact.

There are more powerful uses for this field. I may have configured Automated Processes in GoldMine such that, by entering "F30" in the Result field, GoldMine would know to automatically schedule a follow up call in 30 days.

Success: This is the field that is used the least. It defaults to "Successful" and most users leave it that way. However, doing so eliminates the usefulness of the "Summary" tab in GoldMine.



In the Summary tab above, I have circled the "Last Contact:" and "Last Attempt:" fields. These are updated based on the value of the "Success:" field in the completed activity. Since I selected "Unsuccessful" when completing the Outgoing Call, the "Last Attempt:" field was updated with the date and time of the unsuccessful call. Had I selected "Successful", the "Last Contact:" field would have been updated instead.

When looking at a Contact in GoldMine, the Summary tab is a great place to get a quick snapshot of what is happening. By always using the default of "Successful" in the "Success:" field, the usefulness of the Summary tab is reduced.