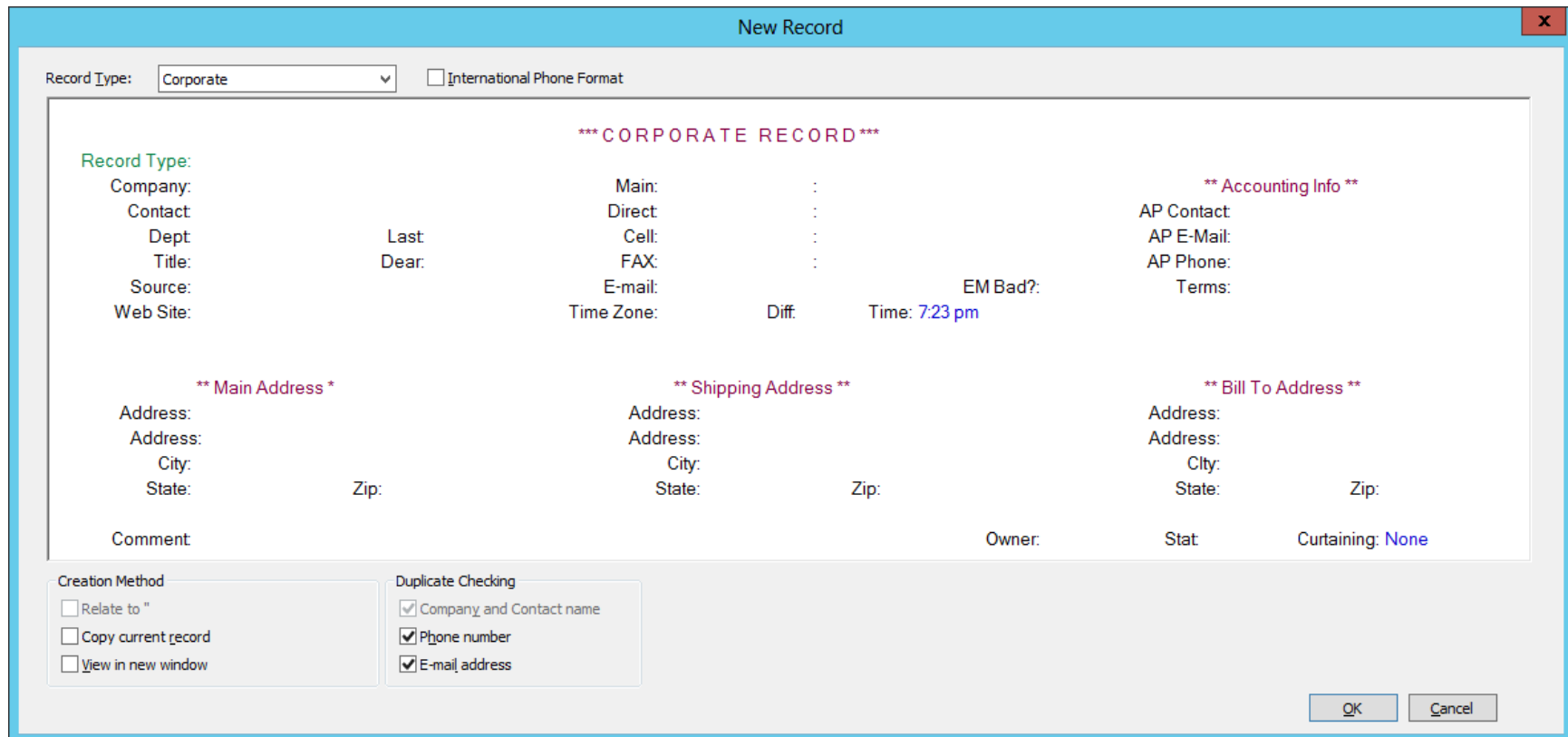


Adding a New “Corporate” Record

1. Click  on the GoldMine Screen.

The **New Record** screen will appear.

2. Make sure the **Record Type** is set to **Corporate**.



New Record

Record Type: Corporate International Phone Format

***** CORPORATE RECORD *****

Record Type:
Company: Main: :
Contact: Direct: :
Dept: Last: Cell: :
Title: Dear: FAX: :
Source: E-mail: EM Bad?:
Web Site: Time Zone: Diff: Time: 7:23 pm

**** Accounting Info ****
AP Contact:
AP E-Mail:
AP Phone:
Terms:

**** Main Address ****
Address:
Address:
City:
State: Zip:

**** Shipping Address ****
Address:
Address:
City:
State: Zip:

**** Bill To Address ****
Address:
Address:
City:
State: Zip:

Comment: Owner: Stat: Curtaining: None

Creation Method
 Relate to "
 Copy current record
 View in new window

Duplicate Checking
 Company and Contact name
 Phone number
 E-mail address

Adding a New “Corporate” Record (cont...)

3. If this will be an “out of country” record, select **International Phone Format**.

The white squares where you can type text are called *entry fields*. The blinking cursor shows you where you will be typing.

Pressing  moves you to the next field. Pressing  +  moves you back to the previous field.

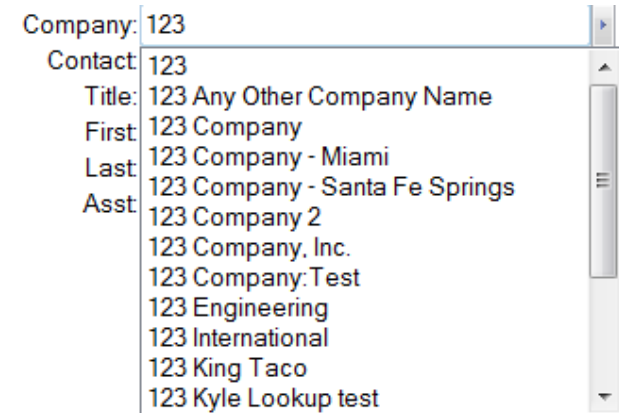
You can also move through the fields randomly by using your mouse and clicking in the *entry field* area next to any field.

4. Enter in the **Record Type**.
5. Type the name of the contact’s **Company**.
 - a. Enter names such as **ABC** without periods (**A.B.C**) or spaces (**A B C**).
 - b. Unless the company name is an abbreviation (ie. Cal A/C), please do not abbreviate (ie. **California Air Conditioning**).
 - c. Please use Proper Case (**NOT ALL CAPS**).


Note: When typing in the **Company** field, GoldMine try to help you along by auto-filling the field with data already in the database.

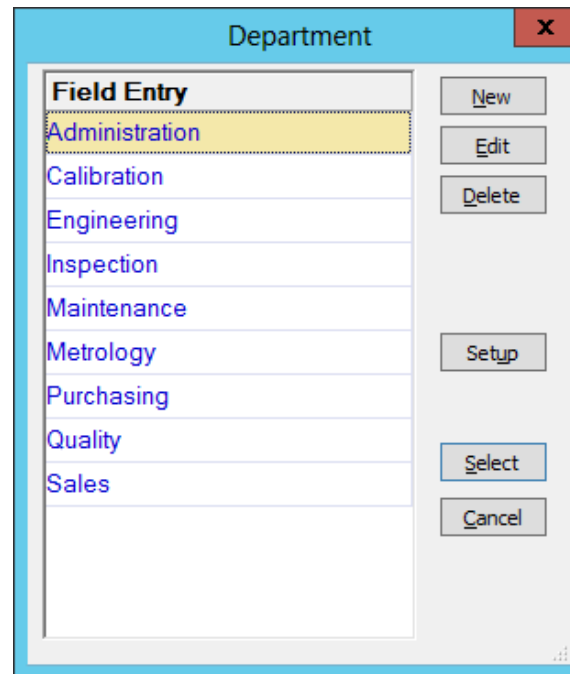
Do not press the **Enter** key. that will assume you want to hit the **OK** button and will take you out of “Edit” mode.

As you start typing in this field, you will likely see an example of GoldMine’s **List existing data** feature. GoldMine will show you, as you type, existing values that already appear in the database. This is one of the many ways GoldMine tries to assist you with data consistency and/or help you avoid data duplication.



Adding a New “Corporate” Record (cont...)

6. Type the full name of the **Contact**. You will notice that the **Last** field has already been populated. Correct if needed.
7. When you arrive at the **Dept** field, click the lookup  button to the right of the field.



This will bring up the GoldMine lookup window for that field. Though you will find these kinds of lookup windows in almost every field in GoldMine, only those that are setup with lookup option will show a list of entries.

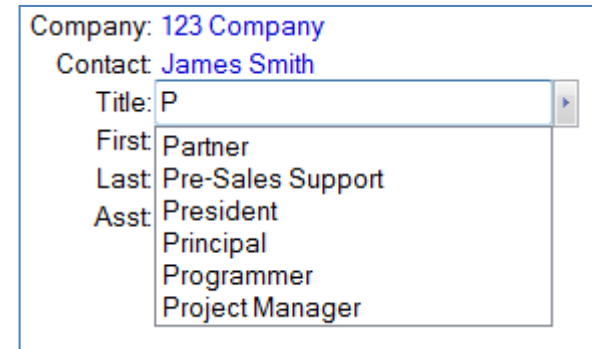
8. Find your desired entry and click the Select button, *or* simply press the ENTER key on your keyboard to make the selection.

Alternatively, you can use the **F2** key while in the field to bring up the lookup list.

Adding a New “Corporate” Record (cont...)

9. Type in/select the **Title** field if applicable.

Depending on the lookup values available, here you may find an example of GoldMine’s **dynamic lookup** feature.



The screenshot shows a form with the following fields and values:

- Company: 123 Company
- Contact: James Smith
- Title: P
- First: Partner
- Last: Pre-Sales Support
- Asst: President

A dropdown menu is open for the Title field, showing the following options:

- Principal
- Programmer
- Project Manager

10. The **Dear** field can be used for either the Salutation (**Mr.**, **Ms.**, **Mrs.**, etc.) or can be used for the name the person prefers to be called. (Contact = "**Robert Smith**", and Dear may be "**Bob**").
11. Enter the **Source** and **Website** fields if available.
12. Continue navigating to the **Phone** field and type a ten-digit *Phone Number*, such as **6025551234**, in this field. (there is no need to enter parenthesis or dashes, GoldMine will do it for you)
13. Type in the **Ext(s)** if applicable or indicate what type of phone number this is. Though we have fields for **Main**, & **Cell**, you may need to provide an explanation.
14. Continue through any other phone numbers you have using the **TAB** key to skip info you don't have.

Adding a New “Corporate” Record (cont...)

15. Enter the primary **E-mail** if you have it. This field is continuing to become increasingly valuable to businesses today.

16. Feel free to skip the **Time Zone** and **Diff** fields as those will automatically populate when you fill in the **State** field later.

17. If you know that **AP Contact**, **AP E-Mail**, **AP Phone**, & **Terms**, feel free to fill in those items.

Note that you will want to add that the **Contact** and **E-Mail** to the **Additional Contact** area later as well.

18. Fill in the **Address** fields as needed. When you reach the 3rd **Address** field and press the TAB key, GoldMine will skip **City** and **State** and take you straight to the **Zip** code field.

- a. Type in the **Zip**, and if the **City** and **State** are in the database, GoldMine will automatically enter those in for you.
- b. If not, you will be prompted to enter this new **Zip** into the *zip code database*.

19. For Corporate and Vendor records, the addresses in the **** Main Address **** section will automatically populated into the **** Shipping Address **** and **** Bill To Address **** sections.

Note: Unlike the other fields that function this way, the overwrite option is OFF for mailing address. Changes made to the Main Address fields later, will not overwrite the value of the Shipping or Bill To Address fields.

Also: The Zip code field in the Shipping and Bill To Addresses DO NOT have the same built-in functionality as the Main Address zip code field. All data needs to be manually entered when changed.

Adding a New Record (cont...)

20. When you hit the TAB key again, you will arrive at that **Comment** field. This is a long 100-character field. The next TAB will actually take you back once to change the color if applicable.

21. The **Owner** and **Stat** fields are for later discussion.

22. Make sure ALL Duplicate Checking options are selected. (Phone number and E-mail address)

23. Click the **OK** button.

Once GoldMine creates a contact record, you can always continue entering data that you had skipped during the previous steps.