

Organization Chart

GoldMine offers you an Organization Chart (also known as the Org Chart or Org Tree) to manage all of your secondary contacts. You can do one of two things with a secondary contact.

You can either

- 1) List them under the Contacts Tab on an existing Contact Record
- or-
- 2) You feel they need their own Contact Record but want to link them to an existing contact record in some way.

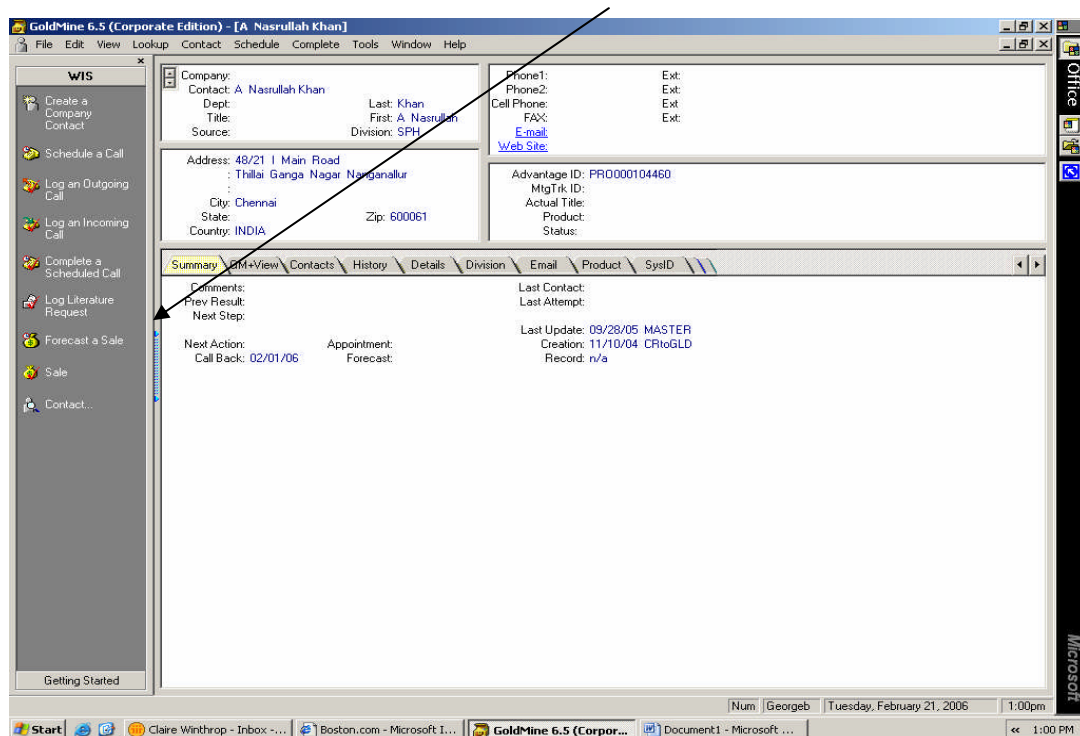
This is where the Org Chart steps in. You can give them all separate records and then link them under the Org Chart.

When should I use the Org Chart?

- When you need to connect separate accounts
- When a large account has many people associated with it
- When the Additional Contacts Tab/window limits the amount of information you need to store on your contact

To Access the Org Chart:

Use the blue dotted marks that separate the Task Bar from the Contact Record. When you place your cursor over these blue marks it will become a pointer to click.



Filters and Groups in GoldMine

What is a filter and a group?

As a user you can define criteria to create a subset of the contacts in your database. This is helpful as your database becomes larger and you only want to access contacts that meet a certain criteria. For example, if you only want to view:

- salesperson's accounts in NY
- contacts that list fax numbers
- contacts in the 781 area code

This allows you to work with a smaller database that is more manageable and pertains to the criteria you set.

What is the difference between a filter and a group?

Filter

- **Filters are dynamic.**
- This means that they are constantly updating themselves to meet the criteria you set by searching your database to find new matches.
- This constant updating allows you to have the most up to date filter possible.

Group

- Groups are created from areas other than fields, such as: details, scheduled calendar activities, completed history activities and additional contacts.
- **Groups are static**
- This means that once you create this subset based on criteria it is set and will not change.
- They will not go through your database again to find new matches and update your subset.
- You can manually select sets of records that have no common features such as area code. This allows you more flexibility with creating subsets in your database. This process is called "tagging" and the results are saved as a **group**.

Digging Deep: Understanding Filters

Boolean Expression

GoldMine's filters are based on **Boolean Expressions**. These are logical statements that must be true or false.

EXAMPLE

Think of a statement that can only have two possible outcomes: true or false.
Here are some samples: It rained today
The ground is wet
The sky is clear

When a filter is activated it is based on an expression that only has two possible outcomes: true or false. When you activate a filter, every contact record is examined to the filter expression that you created.

If the record is "TRUE" to the expression it gets placed in the filtered subset.

If the record is "FALSE" to the expression it is not included in the filtered subset.

GoldMine Boolean Expression

You decide that you want to target your contacts in the state of New York for an upcoming project. GoldMine takes you through the step by step process through a series of tabs to create your own.

EXAMPLE

"State is equal to "NY""

Shown in English but can also be viewed or written in
dBASE upper(contact1->state)="NY""

Step 2: Build Tab

3. **Click on the Build Tab.** Here you will be creating the filter by choosing the expressions that you wish to build upon.
4. **Choose the Field Name.** The drop down menu gives you GoldMine's standard choices of fields. For a user-defined field or information from the Details tab you would need to create a group. For the example below the **City** field has been chosen.
5. **Enter the Operator.** This is where Boolean Expression is used, but GoldMine does the majority of the work for you. Again, using the down arrow choose an operator. This is how GoldMine will search for the records. Equal to is the most basic operator to use.
6. **Enter the Value.** Here you are going to specifically type in the information you are trying to gather. The example below is telling GoldMine to find all contacts whose City field is equal to Boston. This should match how it is typed into your contact records. For example you always enter "Boston" and not "Bos" or you always enter Los Angeles and not "LA."

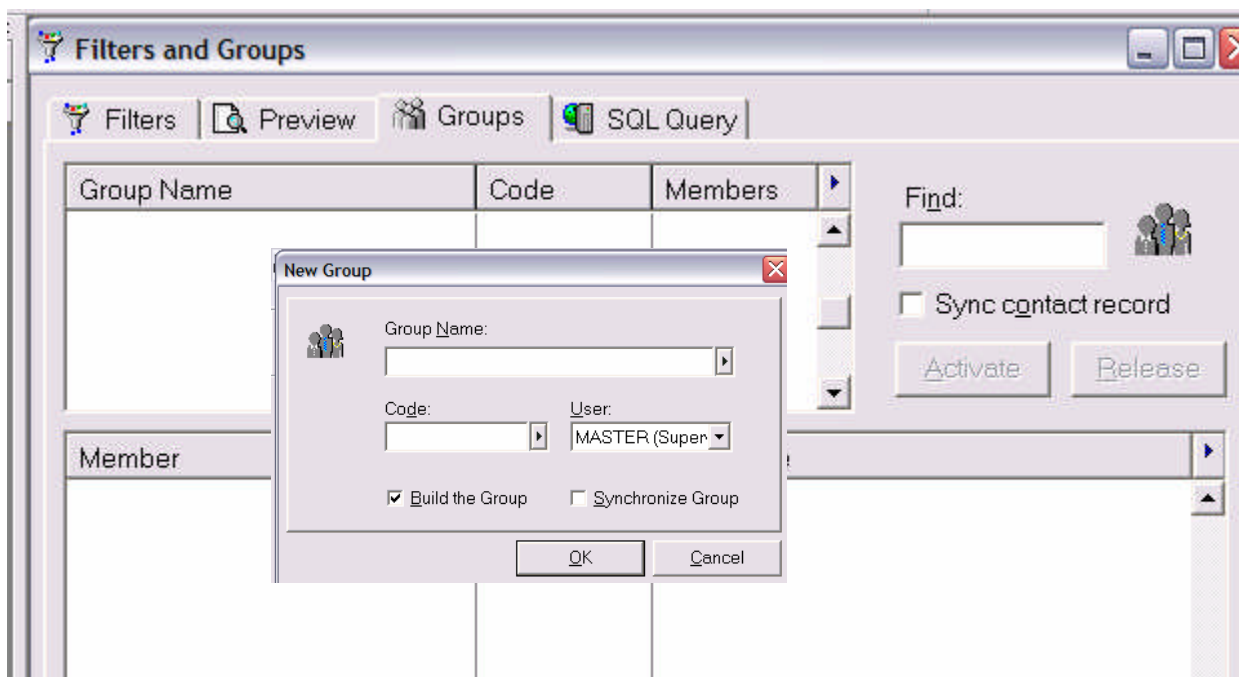
EXAMPLE

The screenshot shows the 'New Filter' dialog box with the 'Build' tab active. The 'Field name' dropdown is set to 'City', the 'Operator' dropdown is set to 'Equal to', and the 'Value' text box contains 'Boston'. The 'Insert Condition' button is highlighted. Below the text box are buttons for 'AND', 'OR', '(', and ')', and a 'Clear' button. At the bottom, there are radio buttons for 'Show in English' (selected), 'dBASE Expr.', and 'SQL Query'. 'OK' and 'Cancel' buttons are at the bottom right.

7. Choose the **Insert Condition** button. Your filter will now be shown in the box below together as one expression.
8. Click **OK**. You should see your new filter listed alphabetically with any others listed.

Guided Practice: Creating a Group

Choose **View>>Contact Groups**. The window below appears.



Choose the **Groups Tab**. This window is broken down into two sections. The top part is a list of groups already created by the user. When you click on one the members in the group will appear at the bottom

To Create a New Group:

Right click in the top part of the window (group listings) and choose **New**. The Group Profile dialog box appears. Select **>>Build the Group**. Choose a group name (remember to name it something that you will recognize when you refer back to it). Choose the user (either yourself, someone else, or public), and click **OK**.

The **Group Building Wizard** will appear to bring you through the process. Here you can choose to build your group based on one of the eight following methods:

- | | |
|---------------------------------------|--------------------------------------|
| Filtered records | *Completed history activities |
| Previewed records | *Supplemental contact data - |
| Details | |
| SQL Query records | *Tagged records |
| *Scheduled calendar activities | Search results |