

GoldMine Tips & Tricks

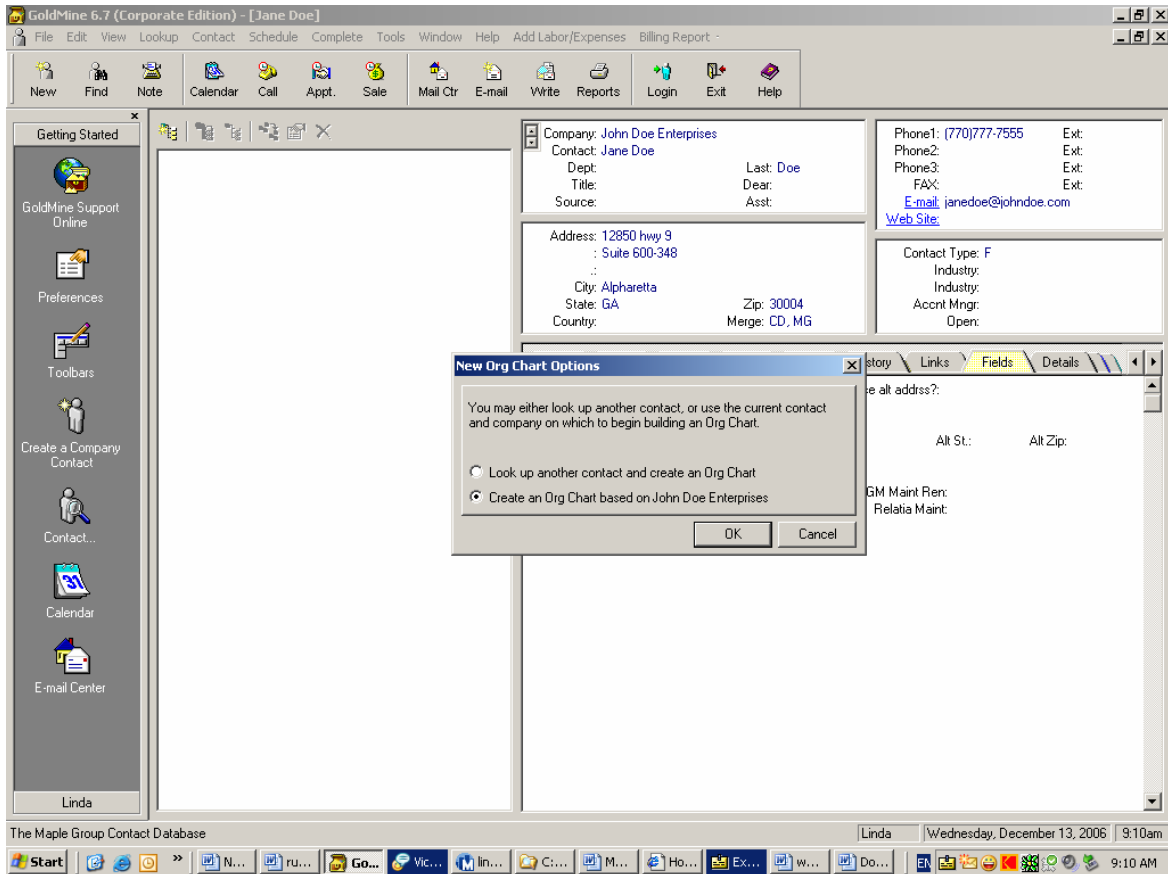
By Linda O'Connor

The GoldMine Organization Chart. Goldmine record contains information based on an individual. There are times when you may want to view your contact at the corporate level or group GoldMine primary contacts together. The organization chart (Org Chart) graphically displays contact information and organizational relationships in a tree structure. The Org Chart displays in an optional pane on the left side of the Contact Record. Here's how to create an org chart in GoldMine.

You can access the Org Chart with any one of the following Methods:

- From the **Edit** pull down menu select **Record Details** then **Organization**
- On your keyboard press **Ctrl+Q**
- On the left side of the contact record select the blue expansion lines

1. Use one of the above methods to open the Org Chart
2. Right mouse click in the left pane
3. Then select Create a new Organization....



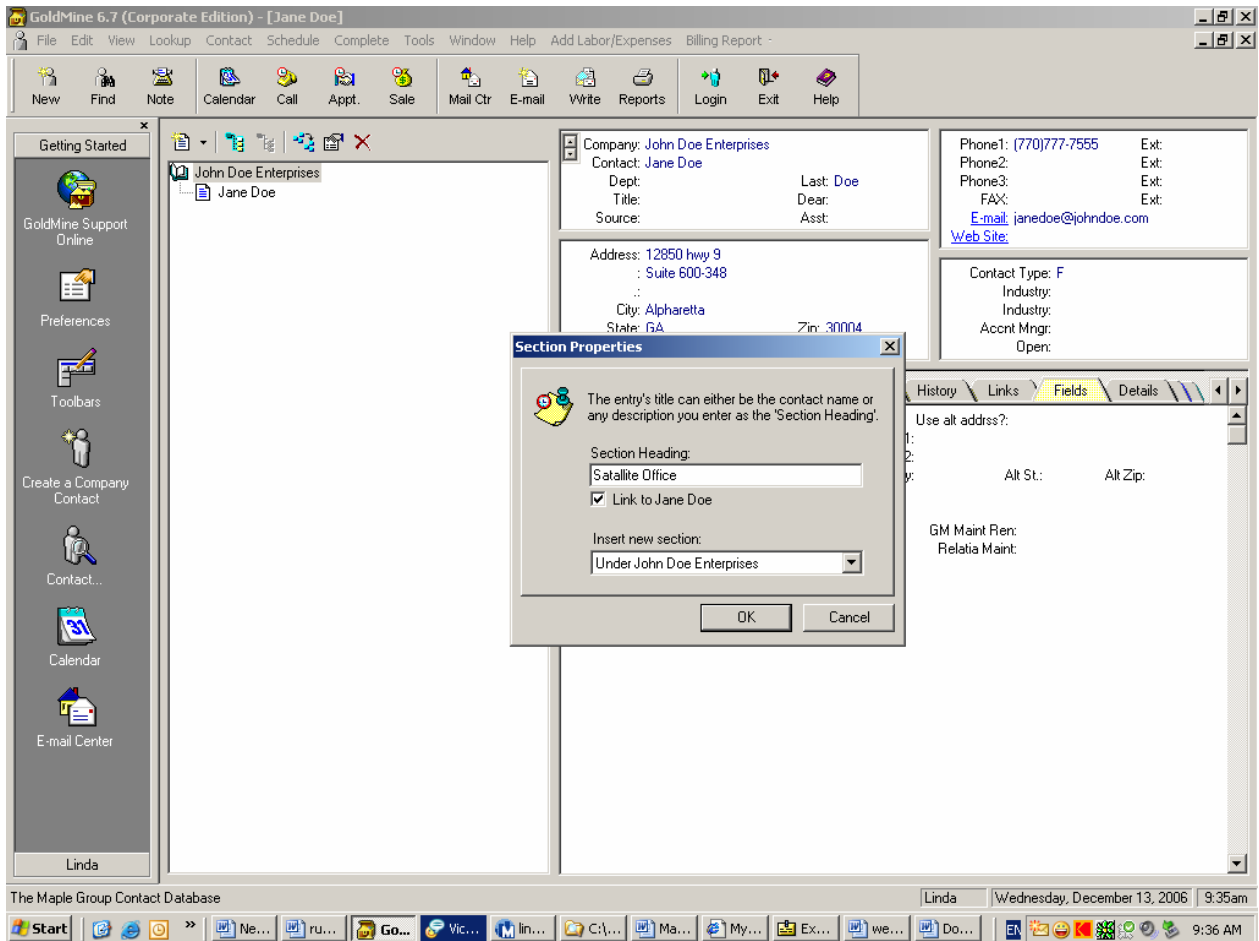
4. Select the option to create based on the company name
5. Then select **OK**.

6. To add additional contact to the organization, position your cursor over the name in the organization chart and right click to display the local menu.

7. **Select New contact >**. From the sub menu you can either **Look up** a contact or **create a new contact** and have that record linked. (This will bring up the same menu used to create a new contact.)

You can also add departments or further subsets to your organization tree.

8. Right mouse click in the Org Tree and select **New Section....**
9. Uncheck the **Link to** option and Enter in the section name – in this case we are using the heading Satellite Office



10. Highlight the new section > Right Click to ADD new contact
11. Select Look-Up Contact
12. Look-Up contact that you want to add to this new section.
13. Select Contact by double clicking on the name in the lookup list
14. The contact will have been added to the org tree. You will notice that if you go to the contact record that you just added – the org tree will also be on that record as well. This way you can navigate through the org tree from any record that is linked to the org tree.

Any questions about the org tree or other GoldMine feature/functions contact Linda O'Connor at lindao@themaplegroup.com or 770.472.7413.