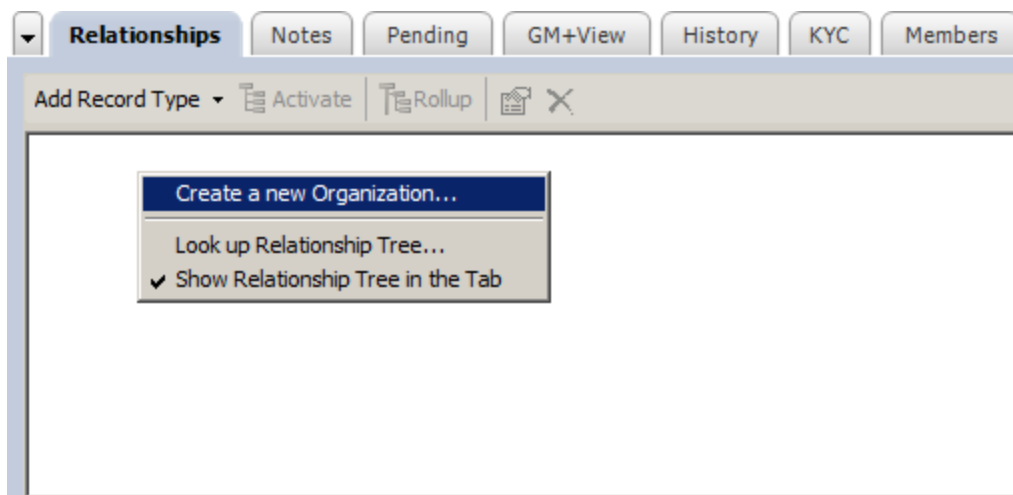


How to: Organize Contacts Using The Relationship Tab

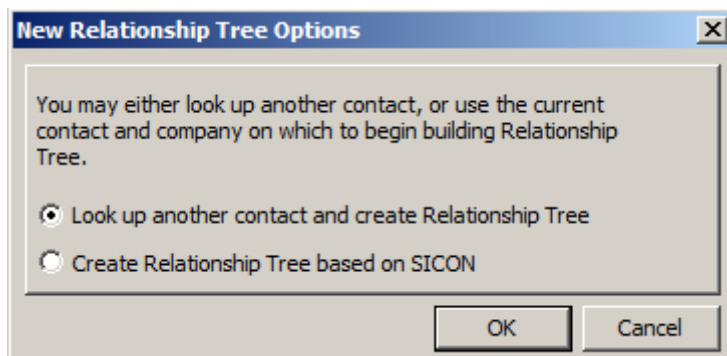
One of GoldMine's most powerful tools is the Relationship Tree. The relationship tree allows you to visually display the structure of any organization. Organization trees also make it very easy to find communications with a group or a sub-group within an organization. This edition of TechTips demonstrates one way to construct and organize a relationship tree.

Step 1: Decide on the relationship you want to illustrate. Often our clients organize by families or business structure

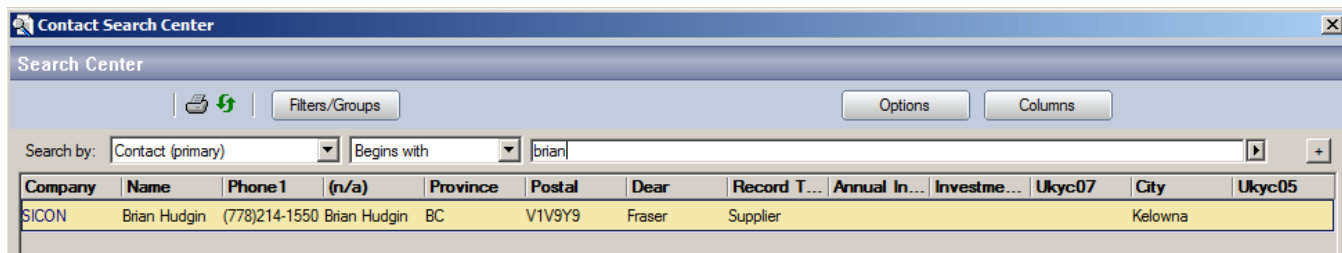
Step 2: Select the relationship tab, right-click, and select *Create a new Organization*



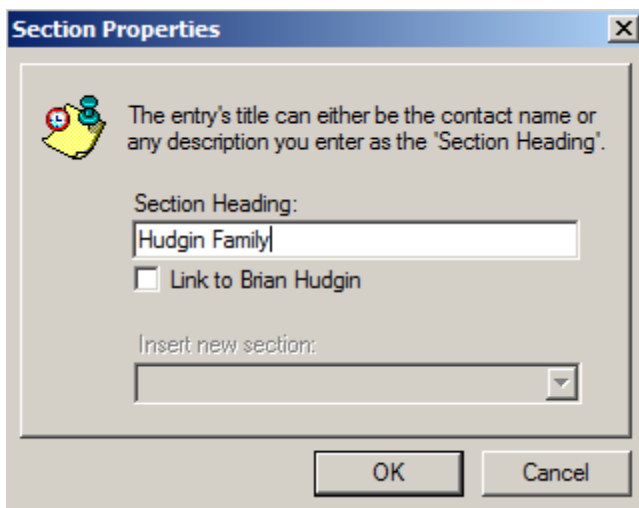
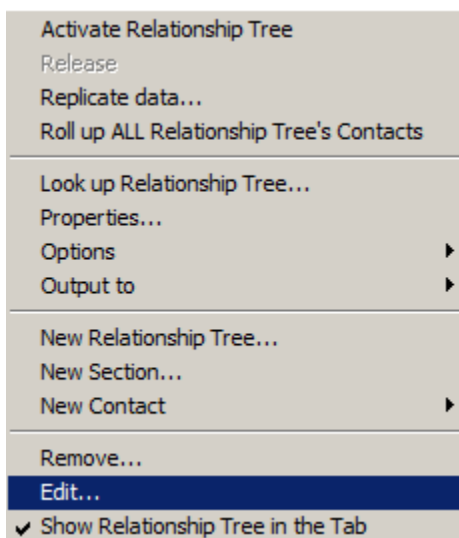
Step 3: Decide how you would like to create the organization tree, GoldMine can automatically perform this via the Company record, but for this example we will create it ourselves by selecting the first option.



Step 4: Select a contact you would like to start with, it does not matter which organization member you select as you can reorganize them after.

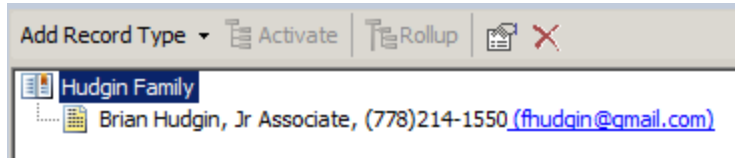


Now that you have created a relationship you are able to edit the name of the organization being described by right clicking on the top of the chart.

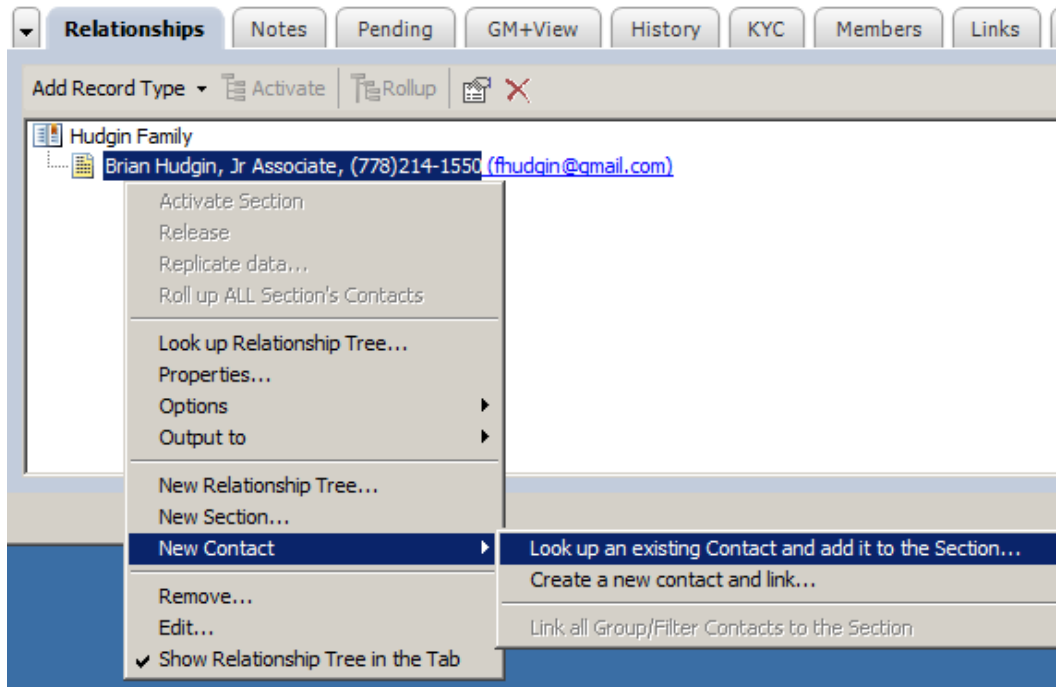


If you have account groups or company records, link the top of the organization to them by opening them in the contact window before selecting edit. If not, unlink the header.

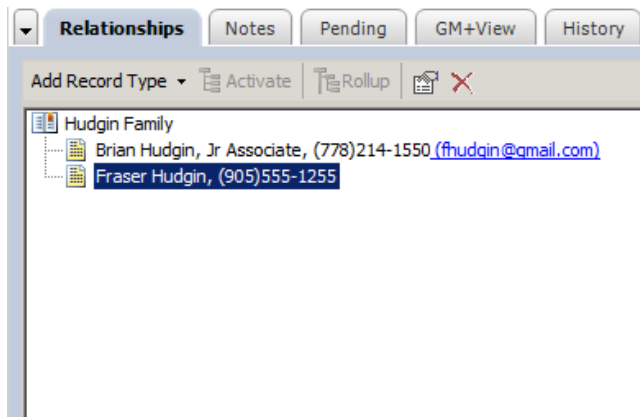
Step 5: Now that the organization is appropriately named, you can add new members by:



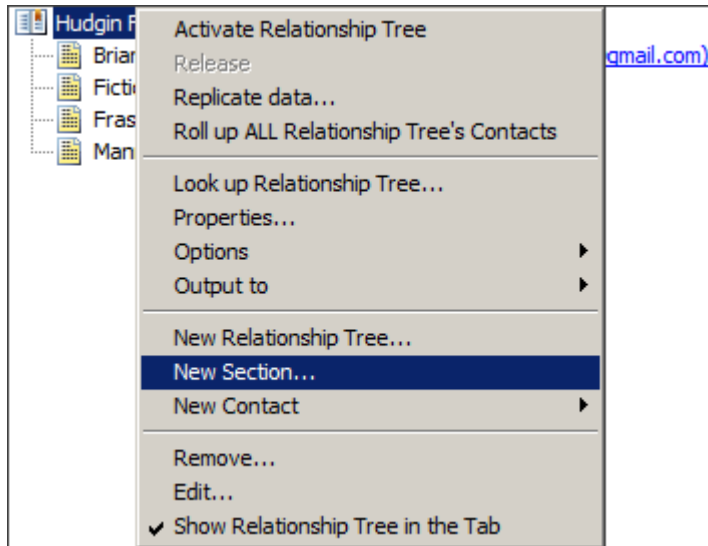
Right Click on the heading or sub-heading you would like to add the contact to



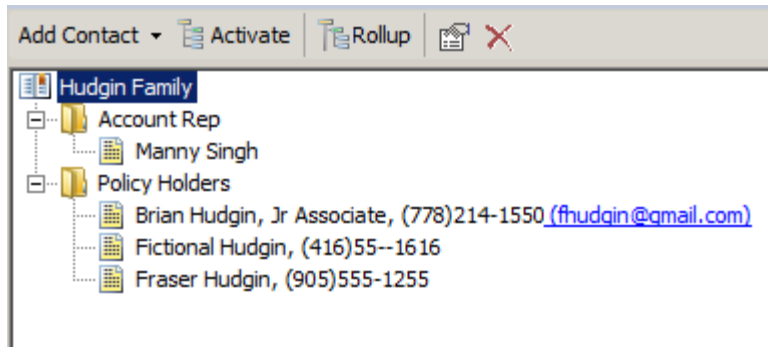
From here you will be able to search and add contacts



Step 6: Once you have added all the contacts in a particular organizational structure, you can organize them with subfolders by right clicking the main record and selecting new section



For example I have organized this policy group by holders and included their Account Representative



After the relationship tree has been completed you can add individuals to sections by right clicking the subfolder and performing step 5b-c.