

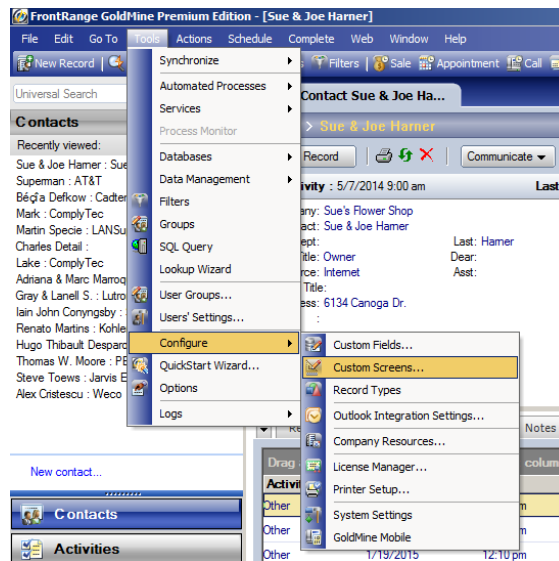
How to: Custom Tabs

Organizing your data in GoldMine often goes beyond the basic default contact information fields. Creating custom tabs which display organized & relevant data allows a very easy means to display key contact information. Furthermore, every field that you add becomes instantly searchable ie, adding a birthday month field will allow you to prepare birthday cards for all clients that month.

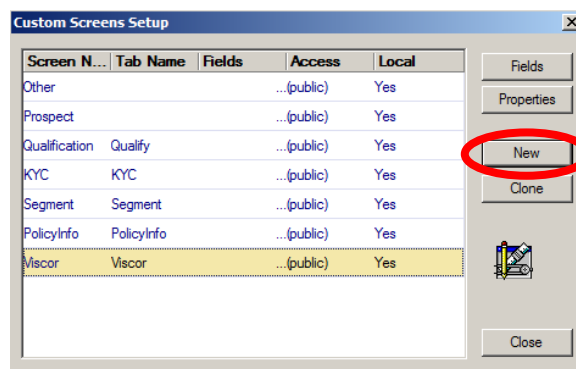
We suggest you organize these custom screens ahead of time on paper to decide exactly which fields you want to capture and how you would like them to be layed out

Once you have decided on this, follow the steps below. Please keep in mind these require master rights:

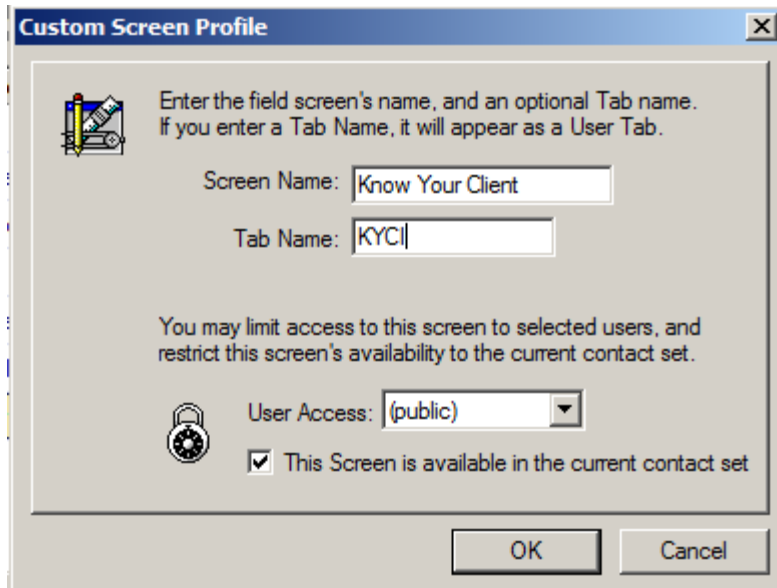
Step 1: Select Tools -> Configure -> Custom Screens



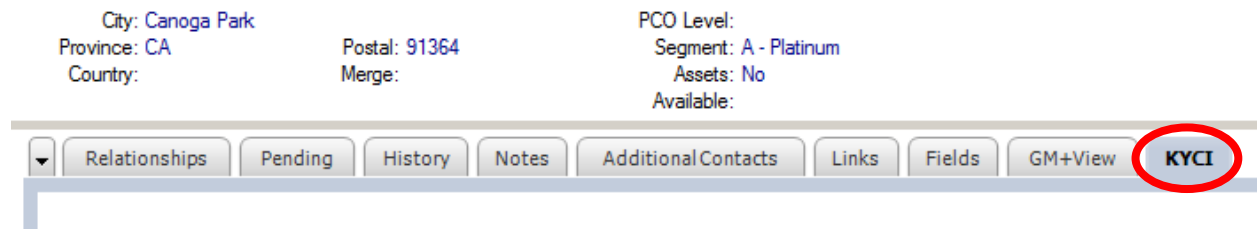
Step 2: This will bring you to the screen below; from the right side buttons select 'New'



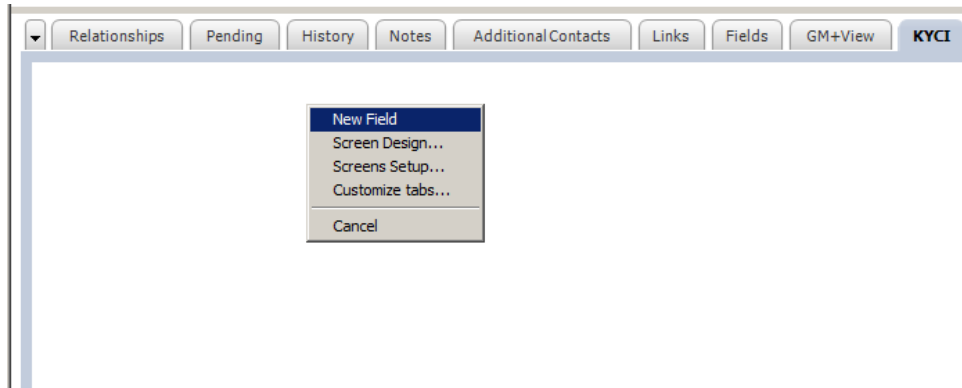
Step 3: After selecting new, you will need to name your screen. The first field is the name of the screen; this name appears in the drop down in the *Fields* tab and on the *Custom Screens Setup* window. This can be more descriptive than the Tab Name, which is generally a one word indicator which will be displayed in your tabs. Note that the Tab Name has a limit of 10 characters



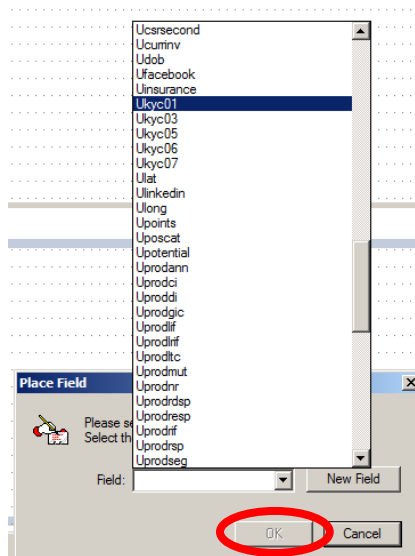
Notice that the 'KYCI' tab has appeared in the tab section, we will use this to store valuable personal client information



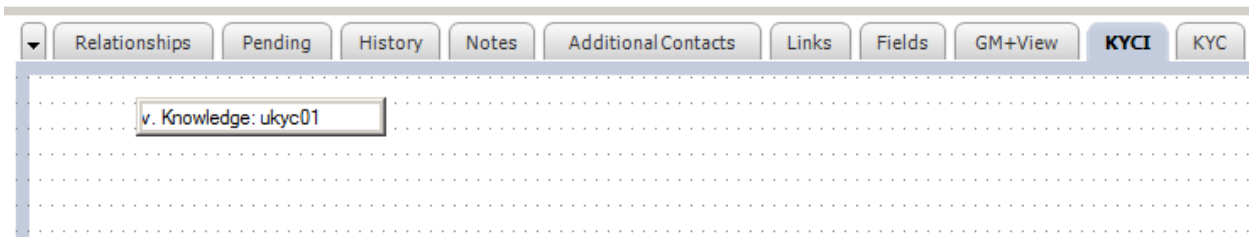
Step 4: In your new tab, right click and select new field. In this example we are only going to use fields that we have already created. If you would like to create custom fields, SICON would be happy to provide some more detailed training.



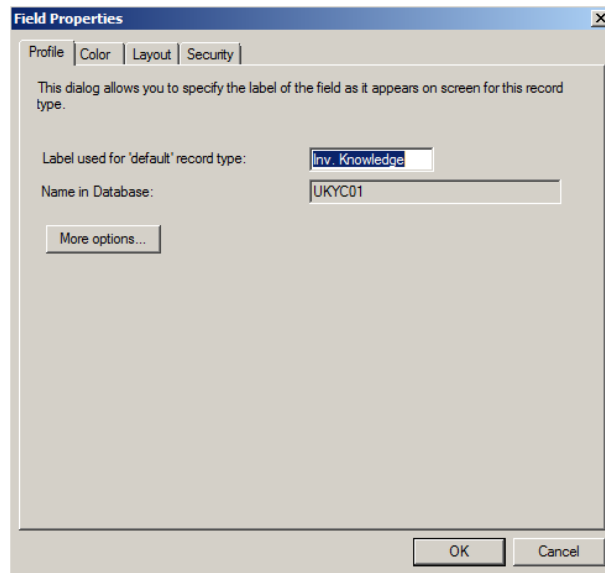
Step 5: From the Field selector, find the field you would like to use first. In this case we are adding the UKYC fields



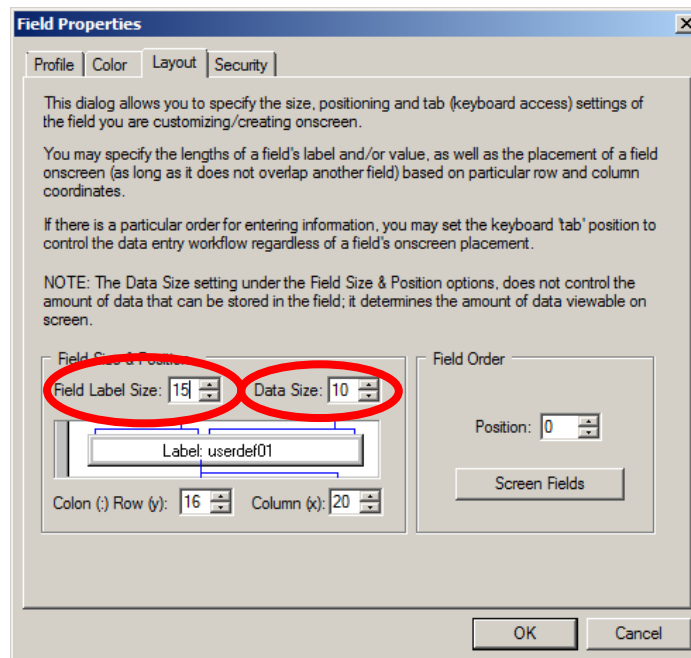
Step 6: Once you have selected the proper field, select okay and using the mouse or arrow keys move the field to where you would like it to sit. Don't worry, these can always be adjusted later



Step 7: Right click on the field, select properties and the below screen will appear, here you can adjust many things including label size, data size, color, required fields, etc.



In the layout tab, if the name you have chosen to assign to the field does not fit, you can alter the label size, you can also alter the data size.



Selecting more options will bring you to the advanced options screen, from here, type in your label name into both fields in the top half of the screen as demonstrated below.

NOTE: DO NOT TOUCH NAME IN DATABASE FIELD

As you can see you can add many fields with relevant contact data