Adding/Amending Contacts in Goldmine

Contact: First Name and Surname – if only the surname is available please only include this. This section should not include any Titles (i.e. Mr, Mrs, Sister, Dr).

Dear: Mr, Mrs, Ms, Sister, Dr – please do not add Miss please amend this to Ms.

Position: If the position is Sister or Matron and Dear the same please do not include a position as this will cause duplications when creating mailings – this does not apply if the position is Senior Sister.

Greeting: This should be identical to the Dear field plus the surname of the contact, no first names should be included – initials are allowed but only if Title is not known.
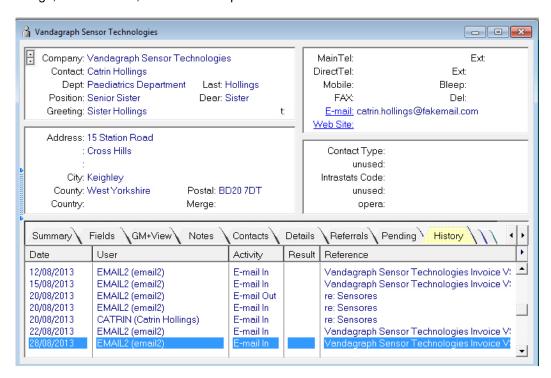
When inputting the **Postcode**, a City and County should automatically be inserted – please check this information is correct and amend as appropriate. Please note that all counties should be written in full for example West Yorks should be West Yorkshire. If the Postcode has not been inputted into Goldmine previously a pop up box will appear – please complete the information accurately as this will be used in the future when the same postcode is used again.

Other information: Please include as much additional information as possible, some information can be gained from looking at email footers.

- Telephone - MainTel must only be the main company/hospital number, if a department or direct dial is known please include this in the DirectTel field.
- FAX numbers - Be careful when copying records, the fax number needs to be checked and only entered if it is the departments fax number
- Opera account numbers – Again when copying records please check you are using the correct account number, some hospitals can have a multiple accounts.

Please see example information below and how this has been inputted into Goldmine record.

Sister Catrin Hollings, Senior Sister, Paediatrics Department

Please try not to leave blank fields, the following fields **must** be filled in for the system to work efficiently: Contact, Department, Dear, Greeting.

When creating a new record please check the Data tab to ensure that the following headings are completed correctly: **Mail Shot Dept**, **Mail Shot Position**, **Mail Shot** – this is most important when a customer specially asked not to be included in mailings. **Viamed Calendar** - If there is no one else in their department and you believe a Viamed calendar would be beneficial to the customer/department please put Y.