Checking Records in Goldmine

1. View the lead form submission in Outlook
2. Copy the email domain
3. Login to Remote Desktop
4. Open GoldMine
5. Paste the email domain into the GoldMine Search Bar
	1. Make sure search is set to “Email” and “Contains”



1. Verify if any records exist for this domain
2. If no records exist, verify the current company name, paying special attention to spelling and capitalization
3. Next, search for the Company name in Goldmine
	1. Make sure search is set to “Company” and “Contains”



* 1. Depending on the company name, you may need to try searching for different variations.
		1. E.g.: California Healthcare Services > California Healthcare > CA Healthcare Services or Red River Community Hospital > Red River Hospital
	2. If you do see a company appear, please be sure to pay special attention to the website domain. If you are unsure if they organizations are related, view the organization domain in a search engine of your choosing and see if they match.

Checking Records in ASP

1. Login to ASP via Remote Desktop
2. Select Client Management Tool



1. Search for the Company Name in the top Search Bar



1. Depending on the company name, you may need to try searching for different variations.
	* 1. E.g.: California Healthcare Services > California Healthcare > CA Healthcare Services or Red River Community Hospital > Red River Hospital
2. If nothing appears, select “Search” on the bottom bar



1. From here, search for the company name with an asterisk “\*” in front of the company name.



1. If no results appear, then no records exist in ASP.