**Procedure Information**

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| --- | --- |
| **Line of Business / Department**Consumer Lending/Dealer Financial Services | **Subject**Goldmine Record Management |
| **Distribution**DFS Goldmine Administrators/Operations Support | **Version**1\_PUB | **Procedure Number** | **Effective Date**07/23/12 |
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| **Approvals**Jim Smith | **Next Review**07/23/13 |

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# Scope

Goldmine contains the client database for Dealer Financial Services. It is used to maintain a record of Dealer contacts and enables Blast Fax, a way to automatically fax information or requests to dealers automatically.

Goldmine is periodically updated to reflect new Dealer contact information and to delete outdated information.

Generally, the level of detail captured herein is intended to provide an experienced

Teammate with an overview and understanding of the subject process and underlying activities and should serve as a resource to such individuals.

# Roles and Responsibilities

|  |  |
| --- | --- |
| **Role** | **Responsibility** |
| DFS Business Project Manager  | Facilitates process to update Goldmine.  |
| Operations Specialist | Provides Dealer contact information. |

# Prerequisites

Access to Goldmine

# Applicable Policies

There are no Applicable Policies associated with this procedure.

# Applicable Systems

|  |  |
| --- | --- |
| **System** | **Definition** |
| Goldmine | Dealer contact database |

# Process Flow

There is no process flow associated with this procedure.

# Glossary

There is not a glossary associated with this procedure.

# Procedures

## Documentation Gathering

Goldmine is updated whenever the Business Project Manager receives an email from the Operations support group regarding contact information for a new or existing Dealer or to deactivate/reactivate a Dealer.

####

#### Step 1 – Send notification by email

Operations Specialist

#### Send email to Business Project Manager to provide contact information for an existing or new Dealer or to deactivate/reactivate a Dealer.

#### Step 2 – Receive Goldmine Request

Business Project Manager

Retrieve email with Goldmine request.

## Update Goldmine Database

#### Step 1 – Open Goldmine and Login

Business Project Manager

**Note:** If Goldmine shortcut is saved on PC desktop, click on the shortcut and skip 1.

### Type into Internet Explorer address bar (Figure 1):

### http://igoldmine.suntrust.com/igoldmine/

Press **ENTER**



Figure 1

1. Click on **Microsoft ActiveX Control: Loose Windows** (Figure 2).



Figure 2

### Log in (Figure 3):

### User name: RACFID

### Password: same as Novell password



Figure 3

1. Double-click on Goldmine icon (Figure 4).



Figure 4

1. Log into Goldmine using assigned Goldmine Username provided by Goldmine administrator. Leave password field blank and click **OK** (Figure 5).

**Note:** Goldmine Username is not same as RACFID.



Figure 5

#### Step 3 – Login as administrator

Business Project Manager

1. Click **File** and click **Log in Another User** (Figure 6).



Figure 6

1. Type **bruinfax** as the username; leave password field blank and click **OK** (Figure 7).



Figure 7

#### Step 4 – Add Contact

**Note:** If updating existing Dealer information, skip 8-9 and reference 10.a. below.

**Note:** If only changing status, skip 9-10 below and proceed to **Step 5**.

Business Project Manager

1. Click **File**; **New Record;** **New Company and Contact** (Figure 8).



Figure 8

1. Enter the appropriate **Company**, **Contact**, and **Phone Number** information provided in the email from Operations Specialist and click **OK** (Figure 9). This initiates a search for duplicate entries in the system.



Figure 9

1. Click on each field (Figure 10) as appropriate to:
	1. type information provided by Operations Specialist into Contact record
	2. set Classification field to **Auto Dealer** and Current Status field to **Active**
	3. change territory to appropriate DRM (see **11. References and Related Documents**).



Figure 10

#### Step 5 – Update Contact Status

**Note:** If not changing status, skip this step.

Business Project Manager

1. Change **Current Status** field to reflect Operations Specialist email regarding status (Figure 11).



Figure 11

#### Step 6 – Add as Member to Fax Groups

**Note:** If deactivating or updating Dealer, skip this step.

Business Project Manager

1. Right-click **Members** tab on the selected Contact Record and click **New** (Figure 12).



Figure 12

1. Add to groups based on grid link (See **11. References and Related Documents**) (Figure 13). Repeat for additional groups that need to be added.



Figure 13

#### Step 6 – Delete as Member of Fax Groups

**Note:** If reactivating, updating or adding Dealer, skip this step.

Business Project Manager

1. Right-click on **Members** tab on the selected Contact Record selected and click **Delete** (Figure 14). Repeat for all Groups in which the contact is a member.



b. Repeat for all Groups that the Contact is a member of.

# Key Performance and Key Risk Indicators (KPI & KRI)

There are no Key Performance or Key Risk Indicators for this procedure.

# Controls

Please contact your Operational Risk Officer for details

# References and Related Documents

**DRM Territory Grid**

|  |  |
| --- | --- |
| DRM | Territory |
| BBUTTO | CO-Colorado, TX-Texas |
| AINSG | MD-South, MD-DE |
| BRADLEYB | Wisconsin |
| CAREYG | MD-North |
| CDUDLEY | TX-Texas |
| FSZ-Bob Zimmerman | PA-FSZ, NJ-New Jersey |
| FSZ-Jim Fox | PA-FSZ, NJ-New Jersey |
| FSZ-Steve Schymanski | PA-FSZ, NJ-New Jersey |
| HBITTMAN | KY, GA-Alabama, TN-Nashville, GA-Rome, GA-Atlanta |
| JANDERSON | FL-South, FL-Miami |
| JGUNTHER | GA-Alabama, FL-Alabama |
| NC West | NC-West, MA-South Carolina |
| JONESC | GA-Atlanta, GA-Rome, TN-Nashville, IL-Illinois |
| ROWENS | FL-Central, FL-Southwest, FL-Miami, FL-East Central, FL-North Central, FL-Northeast, FL-West Central |
| SMITHG | VA-North |
| STANDLEY | NC-East |
| VANSYOC | Wisconsin |
| WHITLEYK | VA-Central, VA-West, VA-East |
| WILLIAMS | GA-Atlanta, GA-Macon, GA-South Carolina, GA-Augusta, GA-Brunswick, GA-Savannah, GA-Columbus, KY-Kentucky |
| WRAO | FL-Tampa, FL-Miami, FL-West Central, FL-Southwest, FL-South |
| ZIMMERMA | MN-Minnesota, ND-North Dakota |

# Points of Contact

For questions about this procedure, contact:

John Somebody, DFS Business Project Manager-Dealer Financial Services, 804.xxx.xxxx, email address

# Appendix

There is no appendix associated with this procedure.

# Change Log

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version** | **Section** | **Change Author** | **Date** | **Change Summary** |
| 1 | All | John Somebody | 7/23/12 | Converted procedure to new template |