FrontRange SOLUTIONS®

GoldMine®

white paper

Sales Force Automation

Customer Management

Integrated Business Processes for Small & Mid-Sized Businesses

Why Upgrade to GoldMine® Premium Edition 9.0?
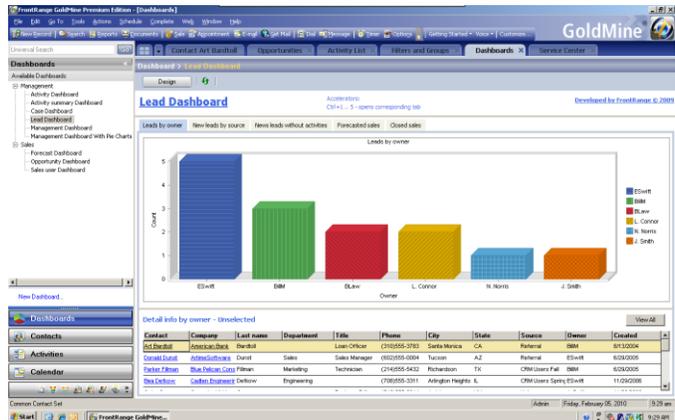
GoldMine® Premium Edition 9.0
Gain insight, improve knowledge
...achieve better results!

"Top Reasons Why to Upgrade"

Are you facing ongoing challenges within your business? Are you having user productivity problems? Are you finding it difficult to understand answers to business questions? Would you like to leverage existing business tools already established at your company? If so, there has never been a better time to upgrade to the newest product in the GoldMine® solution family - GoldMine® Premium Edition 9.0 (GMPE). In addition to the features that you already know and love about GoldMine CRM solutions, GoldMine Premium Edition 9.0 provides new benefits for your company, including a complete set of CRM Dashboards, over 140 product improvements to business functionality, and comprehensive integration with Microsoft Outlook to boost employee efficiency and client knowledge. Here are a few of the reasons for you to consider upgrading to the newest solution brought to you by a mid market CRM leader – GoldMine Premium Edition 9.0…..the safe choice.

1 Complete CRM Dashboards

With a complete set of CRM Dashboards included in GoldMine Premium Edition 9.0, you now can view all your CRM processes in an easy to use graphical or grid interface. GMPE provides clients with a set of configurable dashboard tools to edit or enhance any dashboard provided in GMPE 9.0. Unlike other CRM solutions, GoldMine Dashboards are embedded within the application, and there is no need to leverage third party dashboard products. With the addition of dashboard components that is accessible from anywhere in GMPE, users gain instant access to client and process information such as opportunities, campaigns, cases or activities. Not only can clients view information about a contact, opportunity or other specific piece of CRM data, they can also create completely new dashboards to match their exact business needs. GMPE Dashboards are action oriented, meaning users can drill down from any dashboard to further filter the data view, and users can even drill down into the actual transaction records themselves…..no more static dashboards!

2 Enhanced Microsoft® Outlook® Integration

GoldMine Premium Edition 9.0 provides out of the box integration with the world's most commonly used activity and email management tool, Microsoft® Outlook®. With this robust integration, users are provided a real-time preview of GoldMine information directly from Outlook without having switch back and forth between the two applications helping to improve

adoption time and usage rates. GoldMine information is not only viewable from Outlook, but users can drill down into that GoldMine record for edits or further business follow-up. Training is now easier since both user paradigms are consistent. This quick, detailed view and access of important record information, such as contact details, pending or historic activities, enables greater knowledge and quicker response time from users to clients.

3 Smartphone Capabilities

If a company is utilizing Smartphones as a mobile business tool, the GMPE 9.0 integration with Outlook allows these Smartphone users to gain a mobile advantage since emails and calendaring items are integrated with GoldMine and Outlook. With the GMPE 9.0 integration with Outlook coupled with existing tools that synchronize calendars between Outlook and smartphones, users can see key contact information when viewing an appointment on their smartphones. In addition, email notifications sent within GoldMine for events such as case assignments can now be delivered directly to the recipient's corporate email account, to be viewed on a smartphone for immediate action.

4 New Administration Capabilities

GoldMine Premium Edition 9.0 contains multiple improvements to the already comprehensive robust administration capabilities found in GMPE. Enhancements to the unattended installation process, which originated in GMPE 8.5, allows multiple user configurations to be established within your company. Other administration capabilities such as password policy improvements provide added security to the end user layer and better all around performance of the GMPE application.

5 Utilize the latest in Windows technology

GMPE 9.0 supports Microsoft® Windows® 7 both 32-bit and 64 bit versions, as well as, Microsoft® Windows Server® 2008 R2 64-bit Server O.S. These additions help expand the IT infrastructure and additional platform support for Microsoft. Stay ahead of the curve by using the latest GoldMine Premium Edition on the newest Microsoft products.

#6 Database and Import/Export Data Quality Additions

For improved data quality and stability, GMPE 9.0 natively supports Microsoft® SQL Server® Express and a master list of all field label names and database names is available to facilitate data import and export procedures, as well as a list of all contact database fields and labels will be shown for view, or export to excel. In addition, there is a new option to force all e-mail sent to a user through the mail server for improved auditing, archiving and smartphone access to messages generated within GoldMine.

#7 Searching and Calendaring Enhancements

For easier access and searching on GoldMine data the options shown in the "Search by" list in the Contact Search Center can be reduced to improve usability. In addition, to simply searching for contacts the Last Name field is now an option in the search list drop down of the Contact List and for consistency the search list selection in the Contact List is now retained between sessions so the preferred method of searching is kept automatically saving time and data retrieval efforts. For additional usability enhancements, when the SQL Query Editor is used in the Contact Search Center, GoldMine clearly shows an error message to the user if the SQL query syntax is incorrect. GoldMine Calendar users now have the ability to add or remove users from an existing activity record for better activity management. Calendar users also have the ability to schedule recurring activities with no end date and choose to either open the activity record or the associated contact record when they double click a calendar item for quicker access to data.

#8 …..and Don't Forget Previous GMPE Release Improvements

GoldMine Premium Edition releases 8.0 and 8.5 did a tremendous amount to improve GMPE features and functionality. GMPE 8.0 provides customer service and support functionality to round out all customer facing business needs, and GMPE 8.0 includes a completely redesigned user interface, which removed previous user interface restrictions, makes the CRM data more presentable and improves overall user productivity. GMPE 8.5 features such as Universal Search and Preview Panes gives end users easy access and views into CRM data. Universal Search provides users the ability to perform a single search on data across all CRM functions, including data linked to GoldMine records like emails or documents. Preview Panes display GoldMine data and linked documents information in one clear frame without the user having to open up the data record or linked document. Both GMPE 8.0 and 8.5 features help improve user adoption rates and enhance client knowledge.

#9 Product Quality Improvements

Finally, GoldMine Premium Edition 9.0 has over 140 product quality improvements based on customer feedback!