

An Overview to GoldMine Functionality

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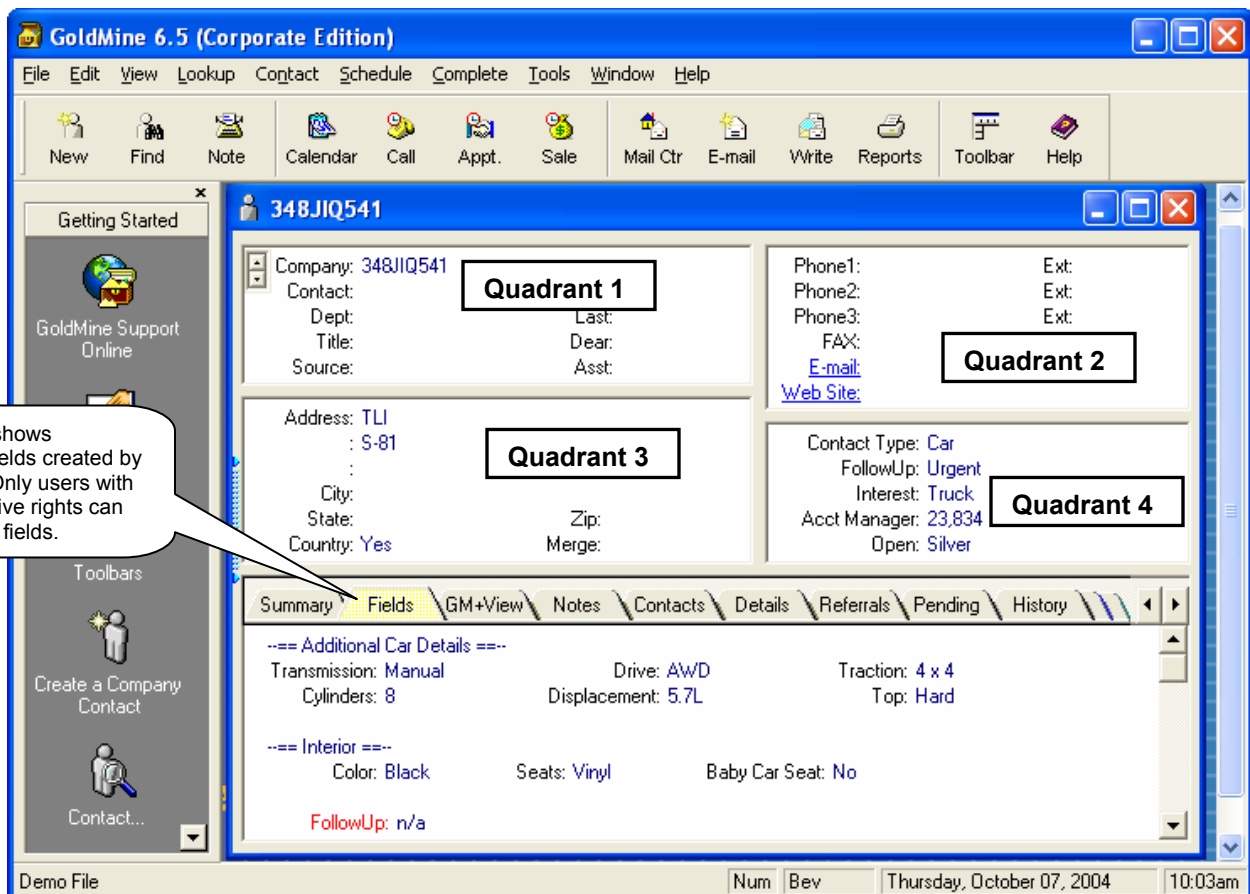
An Overview to GoldMine Functionality

Overview

The information in this document is to be used when answering questions from potential buyers of GoldMine. Additionally, the information could be used to answer simple questions for current GoldMine customers. **If the answers are not found in this document, then the customer must be referred to a GoldMine technician for assistance.**

Contact Management

Contact Records contain typical information such as Company, Address, Phone, Contacts as well as other information that can be defined by the user. Clicking on the *Fields* tab will provide an example of custom fields that might be created by a user.



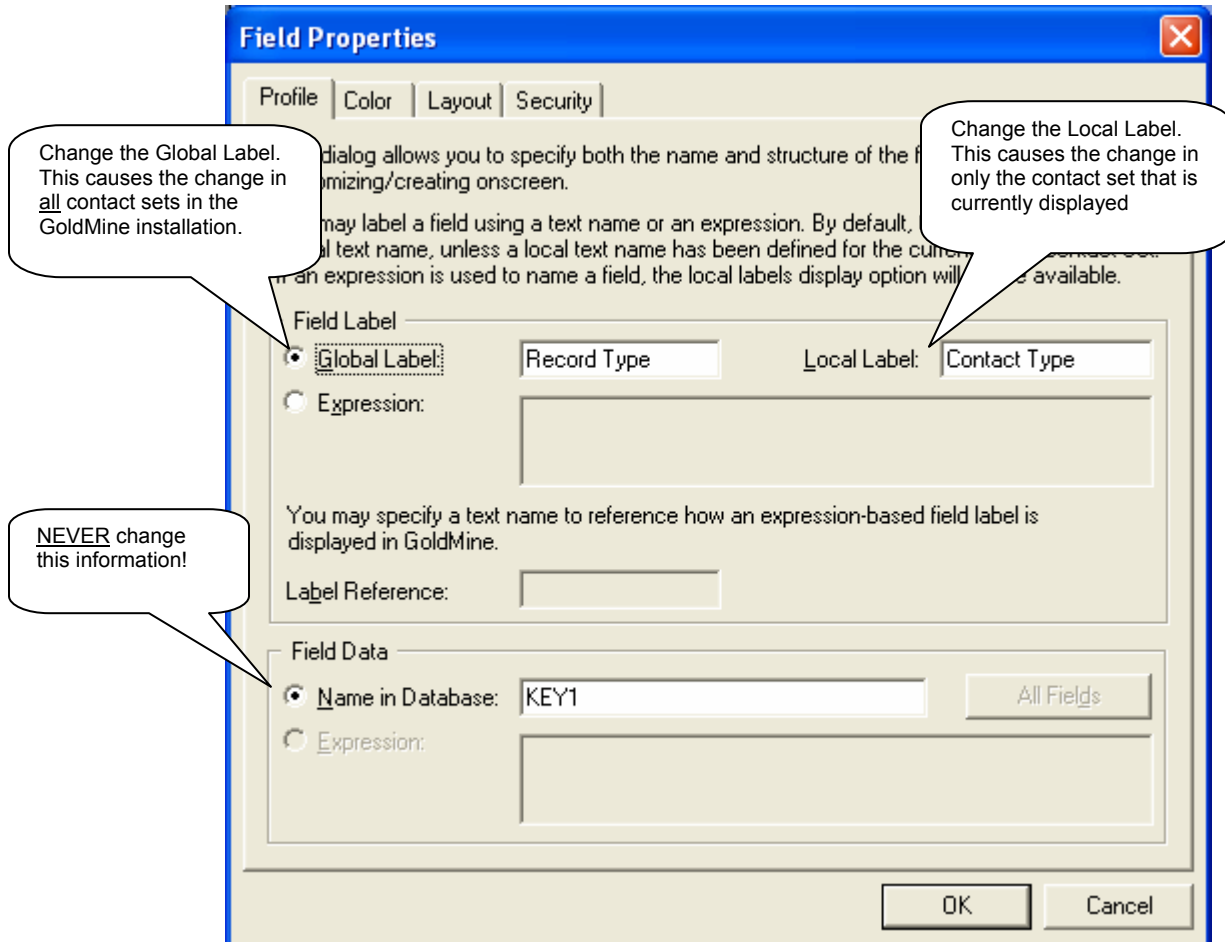
Can I change the fields in the upper four windows (quadrants) of GoldMine?

It is recommended that you not change the field definitions in the upper part of GoldMine. You can, however, change the label for the field that is displayed. Customers often use the fields in the 4th quadrant to reflect information pertinent to their business.

So how would I change the label?

If you **right click** on the field label and **select Properties**, you will see the *Field Properties* window where you can enter a new value for the **Local Label or Global Label**. Note that you should never change the *Field Data/Name in Database* information.

(Any additional questions regarding this functionality should be referred to a GoldMine technician.)



Can I set up GoldMine so that not all users can see all contact records?

Yes, GoldMine has the ability to assign ownership of contact records to an individual user or a group of users. Additionally, you can define how much of a record can be seen by individual users or by a group of users; this is called “curtaining” in GoldMine.

There are 4 levels of curtaining:

- None – all users can view the entire record
- Semi-partial – the tabs are not viewable except by the owner
- Partial – the owner and/or members of the owner’s user group can view all the information; other users will only see quadrants 1 & 2.
- Complete – the entire record is hidden from view by anyone other than the owner

Tabs in GoldMine

The series of tabs in the lower half of the GoldMine contact window are used to organize more information about the contact. Use the VCR arrows on the right to scroll to see additional tabs. Here is a summary of each tab:

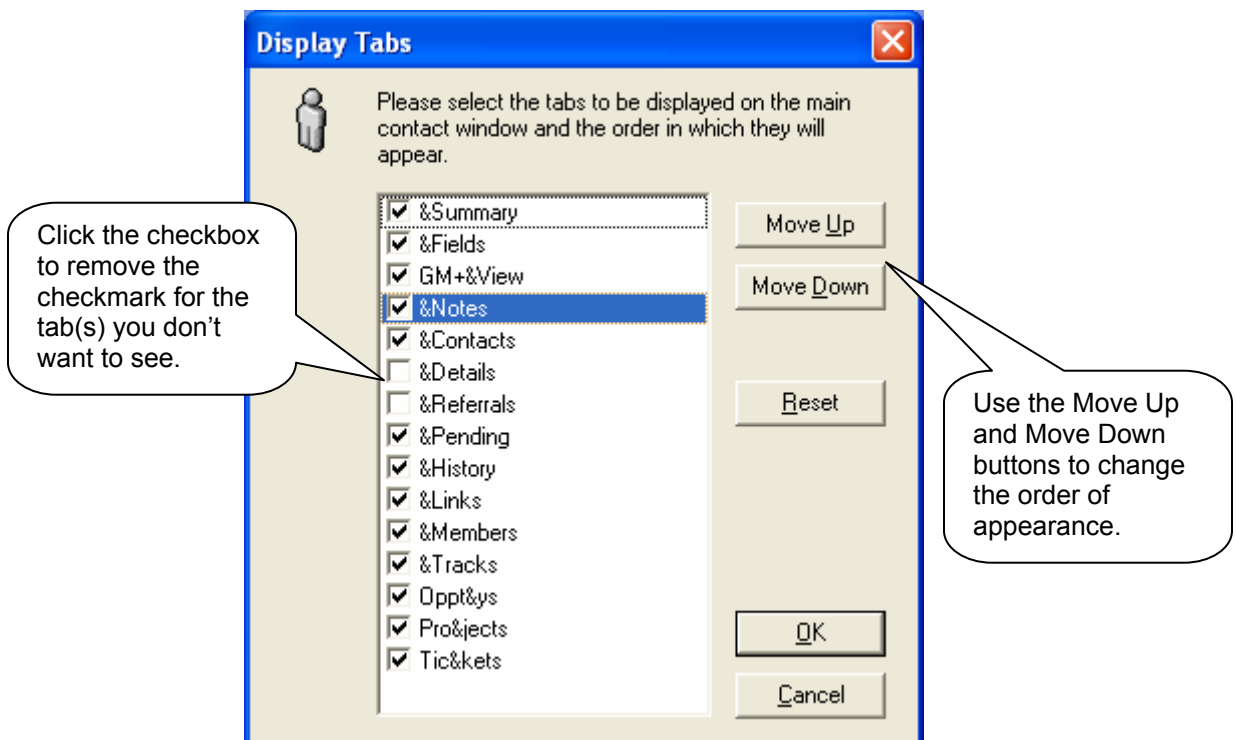
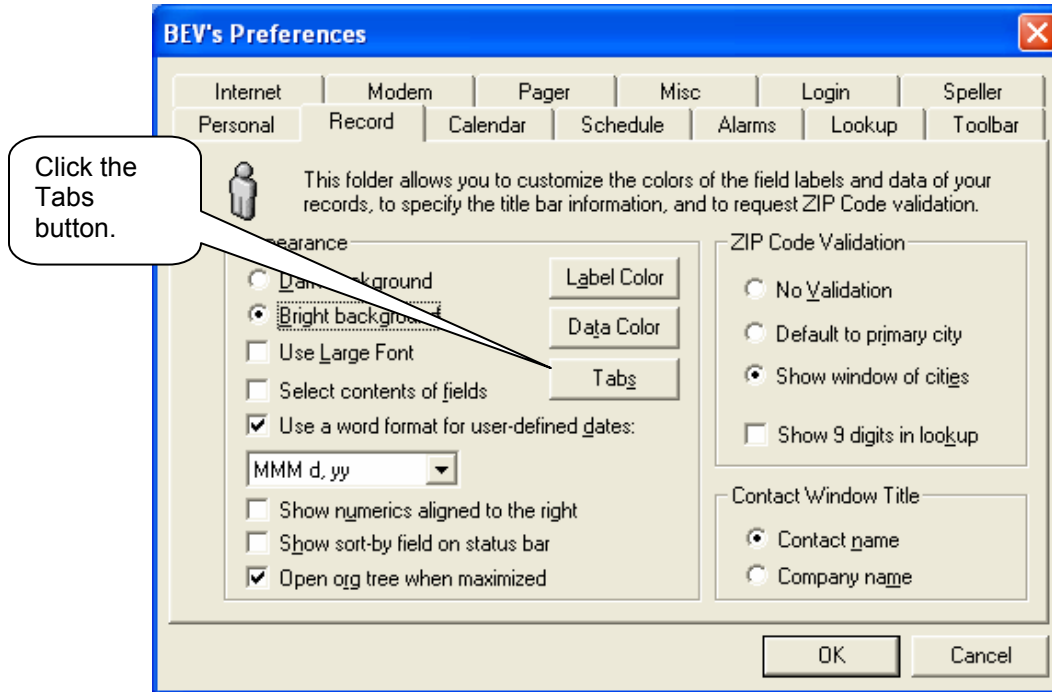
| TAB | DESCRIPTION |
|-----------------------------|--|
| Summary (CTRL + S) | Displays who created the record and when, the last and next activities, the number of records in the database (only for GoldMine, not GMCE) |
| Fields (CTRL + F) | Displays user-defined fields |
| GM+ View (CTRL + V) | Stores custom Web pages or views that can include text, graphics and other rich content |
| Notes (CTRL + N) | Displays miscellaneous notes entered for the contact along with a date/time stamp |
| Contacts (CTRL + C) | Displays additional contacts for the company displayed. Number of additional contacts is unlimited. |
| Details (CTRL + D) | Displays user-definable field information for similar record entries. An example might be a Detail called 'CAR' that would hold information such as make, model, year, color, etc. |
| Referrals (CTRL + R) | Designed primarily to track lead referrals but can be used anytime there is an association between two contact records |
| Pending (CTRL + P) | Displays a list of scheduled activities for the contact |
| History (CTRL + H) | Displays a list of all completed activities for the contact |
| Links (CTRL + L) | Displays a link to any Windows file (a Word document, Excel spreadsheet, etc.) attached to this contact's record |
| Members (CTRL + M) | Displays the list of contact groups that this contact is a member of (A contact group might be something like 'all contacts in a certain zip code') |
| Tracks (CTRL + T) | Displays automated processes or tracks associated to this contact |
| Oppys (CTRL + Y) | Displays Opportunities associated with this contact |
| Projects (CTRL + J) | Displays Projects associated with this contact |

Can I change these tabs - Add new ones? Delete them? Change the order?

Yes, GoldMine allows you to add new tabs. *(Any additional questions regarding adding new tabs should be referred to a GoldMine technician.)*

Though you cannot delete a tab, you can prevent it from being displayed as well as change the order of display.

Select **Edit** from the choices at the top of the GoldMine window, then select **Preferences**. Now click the **Tabs** button.



(Any additional questions regarding Tabs should be referred to a GoldMine technician.)

Screen Customizations

Can I remove or change the “Welcome to GoldMine” text displayed at the bottom of the main window?

Yes, you can remove it completely or change it to something different, such as your company name. This is done by selecting **Edit>>Custom Background** and clicking the **Text** tab.

Can I change the background on the main window?

Yes, you can change it by selecting **Edit>>Custom Background** and clicking the **Background** tab

(Any additional questions regarding Screen Customizations should be referred to a GoldMine technician.)

E-mail

GoldMine’s e-mail functionality uses standard POP3/SMTP protocol for the sending and receiving of e-mail messages. Some highlights of the e-mail functionality are:

- Ability to create standard templates, distribution lists, and e-mail rules
- Ability to create e-mail messages in plain text or rich text using HTML
- Choice to send e-mail messages immediately or queue for later delivery
- Choice to have the e-mail server deliver your e-mails on a set interval or hold until you choose to retrieve them
- Ability to link sent or received e-mails to a contact in GoldMine
- Ability to sign an e-mail with a digital id or to encrypt the contents
- Ability to spell-check before sending

Which e-mail or Internet providers (ISPs) work with GoldMine?

Though we cannot recommend any one provider over another, as long as the ISP uses the standard POP3/SMTP protocol for e-mail, it should work fine with GoldMine. Your ISP can confirm whether or not they use standard POP3/SMTP.

Please note that if you use America Online (AOL) to connect to the Internet, GoldMine e-mail will not work. AOL uses a proprietary e-mail format, not the standard POP3/SMTP format, and it therefore cannot correctly handle GoldMine e-mail.

Can I set up more than one e-mail account under my GoldMine user id?

Yes, GoldMine does allow you to set up more than one account. For example, if you have a business account (john@abc.com) and a personal account (john@yahoo.com)

you can have GoldMine send and receive e-mail through either account. Keep in mind, however, that only one account can be set as the default account.

Can GoldMine perform e-mail blasts?

Yes, e-mail blasts can be accomplished by creating an e-mail template and merging it with all or a group of your contacts. Be aware, however, that many Internet Service Providers will limit the number of e-mails that can be sent from your address in a given period of time. This is usually done to prevent SPAM.

How do I set up e-mail in GoldMine?

A GoldMine technician can assist with this or you can refer to the GoldMine Help files or our knowledgebase for assistance.

(Any additional questions regarding E-mail should be referred to a GoldMine technician.)

Sales Force Automation

The Sales Force automation functionality includes creating and analyzing quotas, scheduling and analyzing forecasted sales, projecting future sales, and analyzing current and/or past performance.

Quotas

- Set a target per sales person over a specified period
- Can set multiple targets for a single sales person, i.e. quota for forecasted sales and quota for completed sales
- Analysis uses data about assigned quotas, forecasted, completed and lost sales to derive a percentage attained by the sales person

Forecasted Sales

- Record anticipated close date of a pending sale
- Includes product or service, anticipated sale amount, and probability of the closing
- Analysis can be performed on projected sales or cash flows for individuals, groups or the entire organization.

Opportunity Management

The Opportunity Manager can record and roll up the activities of multiple people working as a team on a sales opportunity. Tabs in the Opportunity Manager are used as follows:

| | |
|--------------------|---|
| Influencers | Can record names of individuals who may affect or participate in the customer's decision-making process |
| Prods/Svcs | Allows more than one sale to be forecast |
| Tasks | Can record multiple tasks that start and end over differing time periods |
| Team | Indicates which GoldMine users are a part of the opportunity |
| Issues | Log issues or queries related to the sale |
| Notes | Additional notes |
| Competitors | Displays info about rival companies |
| Details | Allows for further profile information and attached documents |
| Pending | All scheduled activities for all users and contacts associated with the opportunity |
| History | All completed activities for all users and contacts associated with the opportunity |

Marketing Automation

GoldMine's Automated Processes automates the workflow processes for repetitive administrative and tracking tasks. The automated process (or track) is a sequence of events; a set of step-by-step instructions that GoldMine evaluates to determine if it should perform specified activities. Each track can have up to 1,000 individual instructions and can therefore, save a great deal of time and effort. Some examples are:

Performing Administrative Tasks

- Each time a new contact is added to the database, an automated process could generate a Welcome letter, then 10 days later send out a brochure of your products, and then schedule a follow-up phone call for a sales person 10 days after the brochure.
- A Thank You letter could be generated any time a sale is completed;
- Perhaps you'd like to send out a Welcome letter when a new contact is added,.

Managing Leads

- When a new record is created, the automated process could allocate sales people, record ownership, etc. based on the analysis of field contents. For example, if the State field is NY, assign to Bob Jones as the Account Rep.
- E-mail the assigned account rep a notification of the new account.

Following up on Contacts

- Schedule follow up calls, e-mails, or letters if there's been no activity for the contact for a set period of time.

Sending Warranty Renewal or Service Contract Reminders

- Send out renewal letters a set amount of time before renewal
- Schedule a follow up call if renewal not received by a number of days prior to renewal date

Automating Direct Mail Campaigns

- Different mailings can go to different customers, based upon information on the contact record.

Validating Data

- Field data can be verified to be correct.
- If incorrect, e-mail a GoldMine user regarding the invalid data

(Any additional questions regarding Quotas, Forecasted Sales, Opportunity Management, and Automated Processes should be referred to a GoldMine technician.)

Point-to-Point Synchronization

Synchronization allows remote GoldMine users (known as 'undocked' users) and other GoldMine systems to keep current with one another. Packages of data called 'Transfer Sets' containing information about data that has been updated, deleted or added, are exchanged.

Do I have to use GoldSync in order to synchronize?

No, it is not necessary to use GoldSync to accomplish synchronization. GoldMine comes with a Synchronization Wizard that will allow users to synchronize with a remote system. This method does however, require that someone on the receiving end be present to accept the incoming data. GoldSync would automate the process so that a user need not be logged on and waiting for incoming synchronization.

Can one GoldMine system synchronize with another GoldMine system?

Example: Two people, each working from their home, with a copy of GoldMine on each of their computers.

Yes, these two systems could synchronize provided each one allowed it.

If I am sometimes remote and sometimes in the office, can I synchronize?

Certainly. When remote, you can synchronize by establishing a connection to your office computer or by sending the 'transfer set' via e-mail. When you are in the office, you can simply connect to the office network and synchronize your data over the network.

(Any additional questions regarding Synchronization should be referred to a GoldMine technician.)

Synchronization with PDAs and other hand-held devices

Please refer to the latest Compatibility Matrix available under the Technical Documents section of the support site. Keep in mind the distinctions between **Compatible**, **Works**, tested but **Not supported**, and **NOT supported**. For newer versions of operating systems, it is accurate to state that our QA department is in the process of testing these versions for compatibility.

(Any additional questions regarding Synchronization with PDAs should be referred to a GoldMine technician.)

Synchronization with Microsoft Outlook

GoldMine has the ability to synchronize with Microsoft Outlook 98, 2000, 2002 (XP) and 2003. Contacts and calendar items can be synchronized from MS Outlook to GoldMine, and/or GoldMine to MS Outlook. The wizard to do this is accessed by selecting **File>>Synchronize>> Synchronize with Outlook.**

(Any additional questions regarding Synchronization with MS Outlook should be referred to a GoldMine technician.)

GoldMine Integration Services for Microsoft Outlook (GISMO)

GISMO allows you to utilize your GoldMine contact information in MS Outlook. The following can be done from within MS Outlook:

- Link e-mails sent and received in MS Outlook to a GoldMine contact
- Create a new contact in GoldMine and link e-mail messages
- Launch contacts in GoldMine
- Link all messages automatically from a particular e-mail address to the corresponding GoldMine contact
- Access GoldMine contacts via the MS Outlook Address Book

GoldMine Integration Services for Microsoft Exchange Server (GISME)

With GISME, you can perform the following tasks:

- Schedule a meeting as a MS Outlook user with GoldMine users and the meeting appears on the user's GoldMine calendar
- Check a user's availability on his/her GoldMine calendar from MS Outlook's scheduling function
- Synchronize GoldMine contact information to a public contact folder in Exchange to allow MS Outlook users to see GoldMine contact information

WHAT'S THE DIFFERENCE BETWEEN THE TWO?

The primary difference between GISMO and GISME is that **GISMO deals with e-mails and GISME deals with contact data and calendar functions.**

(Any additional questions regarding GISMO or GISME should be referred to a GoldMine technician.)

Integration with other applications

Microsoft Word

The GoldMine Link to Word (a free download) is a GoldMine PLUS add-in for Microsoft Word 97, 2000, 2002 and 2003. The GoldMine Link to Word allows you to generate form letters with information from your Contact Records, such as name, address, and other information from the primary contact fields. You can also include information from the user-defined fields.

After creating a form or creating your own document template in MS Word, you can print or fax the merged document to a single contact, a group of contacts, or all contacts in your database. The GoldMine Link to Word automatically updates the inserted fields to reflect each contact included in the merge, generating personalized form letters.

Fax Programs

GoldMine Link to Word supports the following fax programs: Zetafax 7.5, OmniRush 5.5, WinFaxPro 7.01 and higher, RightFax 6 and higher.

Microsoft Excel

The GoldMine Link for Excel installs a GoldMine menu on the Excel main menu to access the two easily configured integrated functions.

- **Export Data to GoldMine:** Offers easy field mapping options to export your Excel database directly into GoldMine.
- **Insert GoldMine Field:** Provides you with a list of GoldMine fields and field macros that you can map to Excel cells. The field mappings remain dynamically linked to the GoldMine fields, changing to reflect the values in the currently active GoldMine Contact Record. For example, you can create a billing form in Excel, insert the appropriate name, address, and user-defined fields. Then you can use the integrated form to generate a printed bill for the current contact.

(Any additional questions regarding integration with other applications should be referred to a GoldMine technician.)

Importing data from other applications into GoldMine

Can I import my data from ACT! into GoldMine?

Yes, you can. GoldMine has an import wizard with a pre-defined profile for importing ACT! data into GoldMine. Versions of ACT! that can be imported are ACT! 2000 and ACT! 6.X or lower.

Can I import my data from Maximizer into GoldMine?

Yes, you can. GoldMine has an import wizard with a pre-defined profile for importing Maximizer data into GoldMine.

Can GoldMine find duplicates after the import?

Yes, GoldMine has a utility to help locate duplicate records based on criteria defined by the user. These records can then be merged together, if desired.

(Any additional questions regarding importing data should be referred to a GoldMine technician.)