



white paper

Sales Force Automation



Integrated Business Processes for Small & Mid-Sized Businesses

Why Upgrade to GoldMine® Premium Edition 8.5?



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GoldMine® Premium Edition 8.5 You need it now more than ever! Real Answers.....Real Time

"Top Reasons Why to Upgrade"

Are you facing different challenges within your business? Are you finding it difficult to understand answers to business questions? If so, there has never been a better time to upgrade to the newest product in the GoldMine solution family - GoldMine Premium Edition 8.5 (GMPE). In addition to the features that you already know and love about GoldMine CRM solutions, Premium Edition 8.5 provides new benefits for your company, including a faster time to deployment, over 300 product improvements to business functionality, and a number of productivity enhancements to boost employee efficiency. 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 8.5.....the safe choice.

1 Universal Search

With powerful Universal Search capabilities included in GoldMine Premium Edition 8.5, you now can retrieve client information in one simple to use feature. GMPE provides users with tools to enhance overall productivity. With the addition of a Universal Search component that remains visible to the user, users can always find in-depth client information such as activities, notes or emails, quickly and easily. Not only can users find information about a contact, opportunity or other specific piece of CRM data, they can also search on information stored in documents linked to a contact in GoldMine. Imagine never having to tell a customer “Hold on while I pull up your information” again. This feature helps users stay on track regardless of any interruptions that they may encounter during the day.

2 Preview Panes and extra details field

GoldMine Premium Edition 8.5 provides users a preview of client information without having to drill into the record itself. This quick, detailed view of important record information, such as linked documents, and pending or historic activities enables speed, greater knowledge and quicker response time from users to clients. With the addition of extra configurable details fields, GoldMine users can now capture additional data to meet their detailed business process and data analysis needs.



3 Apply New User Interface style more broadly

One of the biggest problems in a CRM implementation is trying to make sure that the application gets used. GoldMine Premium Edition 8.5 expands the previous versions usability enhancements across additional business functions, such as opportunities and projects. This expansion offers configurability options for users so they can fine-tune the way the application looks, and enables greater consistency across the application and access to GoldMine data. By providing drag and drop reordering of tabs as well as the ability to show and hide additional tabs, users can become more efficient with a few clicks of a button. Users will be able to select their best view of information for their daily business needs.

4 Email center UI enhancements

GoldMine Premium Edition 8.5 improves usability of GoldMine email functions with additional product features and by aligning usage with the popular Outlook® user interface style. GoldMine email now supports additional grid controls, such as, sorting, filtering and grouping capabilities so users can easily view data and new folder options, such as a favorite's folder and message counts provide better visibility into users email information. Other improvements to GoldMine email usability include the ability to indicate in bold font both read and unread messages, and enhanced email linking capabilities to GoldMine opportunities, projects and cases.

5 Lookup List / Cross-Field Validation

Lookup list, or cross-field validation features allow users to enter data more accurately and quickly in GoldMine Premium Edition 8.5. This feature gives users the ability to validate data in one field based on information stored in another field. For example, users can validate the sales owner of a contact based on the country or region that contact resides in. As another example, users can validate a contacts title, based on the department previously saved to that contact. This feature ensures reporting is more consistent since the application provides companies peace of mind about the overall quality of their data. Along with the obvious data quality benefits, the application also improves overall user efficiencies with the validated entry of data provided with this lookup list feature. Users now have a more definitive list of data to pick and choose from when creating and editing GoldMine data.

6 Case management enhancements

We have all heard statistics about how much more expensive it is to acquire a new customer than it is to retain one. Some studies show that it may be as high as 7-10 times more expensive to get a new customer. In these challenging economic times, it is critical to provide quality customer service to retain customers. New enhancements in GMPE 8.5 allow users to create cases from automated process, thus enabling your entire customer base to log tickets via your website. In addition, you can track case reassignments and escalations, and you now have the ability to change field names. You can also associate multiple contacts to a single case, so more



data can be shared across users, and emails messages can automatically link to a case in GMPE. GoldMine Premium Edition 8.5 helps you understand and leverage your most loyal customers since their entire customer lifecycle information is stored in one solution, and shared across your entire company.

7 Activity Management improvements

One of the key areas for any CRM implementation is ensuring end users can perform their daily tasks with ease, both with clients and with team members. GoldMine Premium Edition 8.5 improves activity management by expanding the ability to manage activities amongst team members through assignment improvements, and via clients with RSVP and delegation enhancements. Also with improvements to notifications and activity list, GMPE 8.5 helps expose data in a simple and effective manner. These activity management items improve team administration capabilities, as well as, greater management control and reporting options.

8 New Administration controls

New administration features provide greater control for administrators to manage user accessibility to help curb user error, incorrect data entry and poor data analysis. User's settings and security rights have been expanded throughout the application so it is easier for your administrators to promote and revoke user rights as needed.

9 Microsoft 2008 support

GMPE 8.5 supports Microsoft® Server 2008, SQL 2008, as well as, 64-bit Server O.S. These extensions 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.

10 Unattended Installations and Automatic Upgrades

The new unattended installation and automatic upgrade options make it easier to implement and upgrade GoldMine with no user intervention. This deployment feature provides a quick time to value so your users can access GoldMine quicker after installations and upgrades, ensuring less downtime and helping free up much needed time for your IT department so they can concentrate on other, important IT tasks.

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