

GoldMine Premium 8.5 VS Goldmine 6.7

NEW FEATURES

New user interface style provides a modern look and feel, making GoldMine Premium Edition easier to learn and use.

Customer service module enables tracking, resolution, and reporting of customer service cases involving GoldMine contacts.

Tabbed view provides quick navigation between open windows in GoldMine and uses the available space on screen more effectively. To start the tabbed view, maximize any open window.

A **context-sensitive pane** in the upper left corner of the screen provides different features, depending on which part of the application is currently in use.

The **Contact List view** includes preview panes for quick navigation to detailed information on a selected set of contacts.

Auto-complete capability improves speed and accuracy in field data entry and in adding recipients to an email message.

Tip of the day helps users learn about the features of GoldMine.

Action shortcuts in the Contact Search Center allow users to quickly schedule activities, send e-mail messages, initiate mail merges, and append contact groups or distribution lists. Actions apply to a single contact or tagged group of contacts in the Contact Search Center.

Available Plug Ins provide custom menu options and allow developers to embed custom applications into GoldMine. GoldMine Plug Ins support ActiveX Objects.

Integration with MS SQL Reporting Services enhances GoldMine's reporting functionality. Reports can be scheduled to run at a preset date and time, and can be delivered via email.

GM+Browser allows users to create views into other data sources, both internal and external to their organization. This feature is similar to the existing GM+View capability. With GM+Browser, however, the information is located in an independent, floating screen, allowing for greater flexibility in how information is displayed. The GM+Browser window can be open at the same time as other program windows and the information displayed in it is not necessarily linked to the open contact record.

Universal Search allows users to 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.

GoldMine Premium Edition 8.5 provides users a **preview pane** 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.

GoldMine now supports 32-bit and 64-bit versions of Windows Server 2008.

GoldMine now supports Microsoft SQL Server 2008.

GoldMine now supports the 64-bit version of Windows Server 2003.

Synchronization with Palm OS devices has been updated to support newer Palm devices. GoldMine now supports Palm OS versions 3.0, 3.5, 4.0, 5.0, 5.2 and 5.4, with Palm Desktop version 4.1.0, 4.1.4 or 6.0.1.

ENHANCEMENTS

A configuration setting is now available for the default record type used when creating new records. To view or change this setting, go to Tools > Configure > Record Types and double-click on Record Type Rules. The setting is available when using Field value-based rules, and appears in the radio button labeled "**Record type for new contacts**".

An updated **ZIP code database for the United States** is available through the QuickStart Wizard.

Support for Microsoft Office 2007 enables integration with the latest versions of Microsoft Word, Excel, and Outlook. Also, the Word and Excel links now are optional components of the main GoldMine installation, rather than being installed separately.

Enhanced Account Rollup provides a clearer picture of the activities associated with an account, by including the name of each contact within the Pending and History tabs. To enable this feature, go to Tools>Options>Record and check "Show contact name on activity tabs". To see an account rollup for a particular record, go to the Relationships tab, select a section of an organization, and click Rollup.

The process of **unlinking and relinking email messages** has been improved to reduce errors which previously caused users to accidentally remove email addresses from contact records.

The **One-button Installer** now supports installation directly to a **Microsoft SQL Server 2005 Express** database.

GoldMine Premium Edition now supports **Microsoft SQL Server 2005 Service Pack 2 (SP2)**.

GoldMine Premium Edition now supports **Windows Server 2003 R2, Service Pack 2 (SP2)**.

Grids have been enhanced to provide additional grouping, sorting, and filtering capabilities throughout GoldMine Premium Edition.

Left navigation bar allows direct access to major features of GoldMine. Buttons from the task bar in previous GoldMine versions are now available as buttons on a customized toolbar.

The **contact record display** has been redesigned, to remove the 'quadrants' from previous versions of GoldMine and to enable more customizability.

Partial Record Curtaining now can be used to display custom fields in first four rows of the contact record to users without ownership rights to the record.

Contact record tabs now can be reordered, and more of them can be displayed on screen at once.

The **GoldMine menu system** has been reorganized to be more logical and consistent. For those who prefer the previous menu structure, a "classic" view is available as an option.

The **Contact Search Center** has an improved interface for building complex searches.

The **Org Chart** has been redesigned and now is placed within the Relationships tab. A new **Relationship Tool Builder** allows for organizational trees to be automatically created based on end user's criteria.

Support for simultaneous **alarms** has been improved, so all alarms are displayed within a single screen.

Notes in a contact record are now stored independently, to support multiple notes more effectively.

The **database rehosting wizard** has been redesigned for simplicity.

Additional calendar options have been added to make it easy to display the company name on activities in the calendar. To view or change this setting, go to Tools >> Options >> Calendar tab >> More Options.

An **e-mail message** now can be sent to a contact by right-clicking on an activity in the calendar or on a topic in the knowledge base.

The Borland Database Engine (BDE) is no longer in use. In addition, the dBASE database has been replaced by the Firebird database. The new database architecture will substantially reduce instances of data corruption and database errors. When upgrading from previous GoldMine versions to version 8.5, existing data will be seamlessly migrated over to the new database.

The product licensing scheme has been enhanced to allow FrontRange Solutions to provide better support to its clients. The serial number structure has been modified to provide more detail about the user, number of seats, and product version. Prior to completing the upgrade process, users will need to obtain a new serial number and key code.

The GoldMine installer has been redesigned to be easier to use.

There is a new "Delete unlinked e-mail" user setting that permits users to delete emails that aren't linked to a contact, even if they don't have permission to delete contact-related data. This setting is enabled on the Access tab of User Settings.

SQL timeout settings are now configurable in order to support longer database queries. The following settings are stored in the gm.ini file, under the [GoldMine] section:

- SQLQueryTimeout - global timeout for all database queries (in minutes)
- LongSQLQueryTimeout - timeout for some critical operations (in minutes). This timeout is used for synchronization and database reindexing.

In order to improve the performance of the Firebird database used with GoldMine, the default configuration of Firebird databases is now with “forced writes” turned off. This means that the Firebird database can delay writing to the disk for up to five seconds. Please note that this can result in loss of data if computer power is unreliable or if the computer is turned off without shutting down properly. Customers who require utmost reliability of their database should use one of the following alternatives:

1. Use uninterruptible power supplies and/or perform proper shutdown procedures.
2. Change the Firebird database configuration to turn on “forced writes”. This can be achieved by running a gfix.exe utility supplied with the Firebird server with the following parameters: "-write sync -user <db login> -pass <passwd> <database file name>". Please note that this configuration can cause sync times to be 20% longer.

Use Microsoft SQL Server 2005 Express instead of the Firebird database. Note: SQL Server 2005 Express has a maximum database size of 4 GB.

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.

Secure **SSL connections** now are supported in the E-mail Center. The **IMAP** protocol now is supported in the E-mail Center, providing more security and better interoperability with other email clients.

An Unattended installation enables GoldMine to be installed or upgraded without end-user intervention.

The **Linked Document Mover** has been enhanced with the ability to restrict the locations from which documents will be moved.

Four new fields are available in the Info tab of Details.

Macros can be added to custom toolbars.

Notes are now stored in a dedicated NOTES table for better reporting, auditing, and data synchronization. Previous versions of GoldMine combined all notes for a contact in a single field. New user settings are available for administrators to permit a user to **Insert notes, Edit/delete own notes, and Edit/delete others' notes.**

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.

Unicode database support enables multiple languages to be stored within a single GoldMine database. Note: selecting this option will significantly increase the size of the database.

A new user setting is available to grant **permission for end users to customize their toolbars**. This prevents end users from customizing their toolbars if required by administrator.

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.