



white paper

Sales Force Automation



Customer Management



Integrated Business Processes for Small & Mid-Sized Businesses

Why to Upgrade to GoldMine 6.7 Corporate Edition

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GoldMine® 6.7 Corporate Edition "Top 5 Reasons Why to Buy"

Following is summary information about the "Top 5 Reasons Why to Buy" GoldMine® 6.7 Corporate Edition (actually, there are a lot more reasons than 5 reasons to buy today). For FrontRange Solutions (FRS) Sales, Support and Customer Care teams -- this is information specifically provided for your use when responding to current 6.x, 5.x, 4.x,¹ 3.x, and 2.x customers who are interested in upgrading to GoldMine 6.7 Corporate Edition.

Following is summary information about the "Top Reasons Why to Buy" GoldMine® 6.7 Corporate Edition (actually, there are a lot more reasons than 10 reasons to buy today). For FrontRange Solutions (FRS) Sales, Support and Customer Care teams -- this is information specifically provided for your use when responding to current 6.x, 5.x, 4.x,² 3.x, and 2.x customers who are interested in upgrading to GoldMine 6.7 Corporate Edition.

#1GoldMine 6.7 is now even easier to use

During installation, GoldMine now automatically detects the presence of ACT!, Excel, and Outlook and prompts the user to convert their existing contact data. GoldMine makes switching faster, simpler and more seamless than ever!

For new and existing users, the simpler, more intuitive Reports Center offers users a re-designed tool for accessing and managing GoldMine's reports. In addition, for those times when users just want to run a report without any changes, GoldMine now offers a shortcut for quicker report printing!

GoldMine now delivers a more interactive experience for users through a variety of HTML-based 'Alerts' that detect user-initiated or background actions and provide helpful notifications, suggested actions, or status updates. Users can even get context-sensitive Help, on-demand by optionally clicking the 'More Info' links jump to content on the Web and/or in the online documentation!

Alerts offer step-by-step guidance for integrating the key functions in GoldMine that users can leverage for campaign management, such as mass E-mail/Mail/FAX merging, Leads Analysis and target market segmentation. Alerts notify users and administrators if a process doesn't occur or complete successfully, if a user is about to perform function that can't be undone, or if there is a potential problem, recommending the steps/procedures that should be followed.

¹ Support for GoldMine 4.x and prior is no longer available. This should be emphasized as needed to offer customers incentives for upgrading.



#2 Web import Deployment tool

With Web Import you can leverage your website investment and conveniently capture lead information and bring them directly into GoldMine. No Web programming knowledge or experience? No problem! A wizard-driven interface helps you set up Web Import by allowing you to pick the data you wish to collect and import. You build the form that best fits your needs, capture the data from the Web and import it into GoldMine.

#3 Improved integration

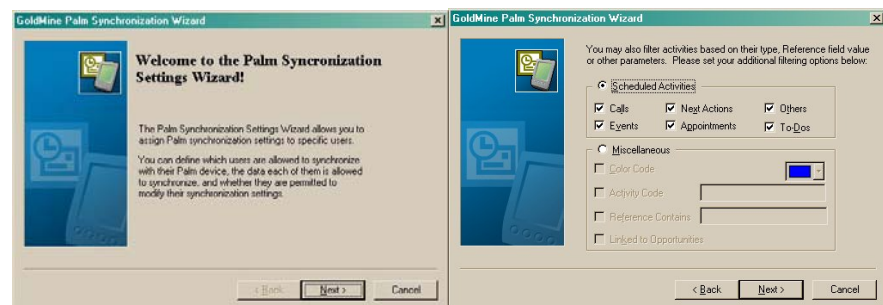
GoldMine® 6.7 Corporate Edition is ready for integration with the third-party applications you rely on to do your job more efficiently. Just think - it is now even easier to provide your users with a complete view of all customer information within GoldMine, enabling your entire team to provide better service to your customers.

Powerful new development tools, including a built-in COM server, and XML and user interface communication layers make it easy to integrate your existing systems and GoldMine contact information in new ways for greater returns. In addition, GoldMine 6.7 Corporate Edition integration tools are now Microsoft® .NET compatible, allowing programmers to easily integrate with GoldMine using C#, VisualBasic.NET and other .NET development tools.

#4 Advanced Palm™ Integration

Boost your mobile productivity. GoldMine 6.7 Corporate Edition offers enhanced integration for Palm OS® devices³, with these key advances:

Increased security offers greater control over who can make changes to your GoldMine database via your Palm device. You can prevent unwanted modifications—such as contact updates or deletions—and control who can modify synchronization settings with the centralized Palm synchronization profile manager. Activity filtering options optimize your Palm calendar for out-of-office use by allowing you to choose which GoldMine activities to synchronize to your Palm device. GoldMine 6.7 Corporate Edition now supports new devices using Palm OS 5.0 and higher—including traditional PDAs and Palm OS powered smartphones such as the Treo 600.



³ Requires Palm OS 3.0 and Palm Desktop Software 4.0 or higher



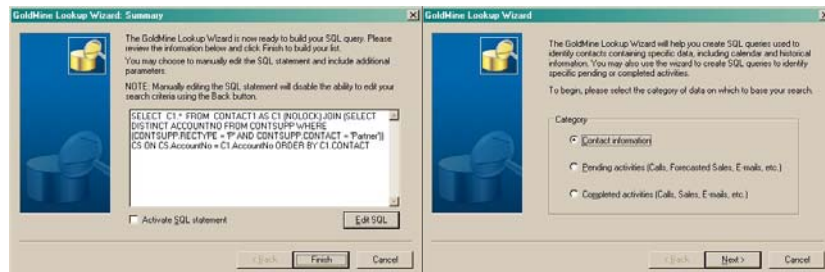
#5 Enhanced Recording Typing

Record Typing allows you to create specific views, fields and rules for different types of contacts or records within your database. GoldMine 6.7 Corporate Edition includes important Record Typing enhancements that make it even more powerful – and valuable – to you! Now you can quickly search and filter on different record types, to easily access the information you need. Display Record Type-specific HTML content within GM+View and leverage linked images more easily. In addition, improved data entry features allow you to leverage auto-fill features when entering new records via custom new record windows.

Company	Contact	Phone1	Record Type
Blue Pelican Consulting	Parker Filman	(214)555-5432	Prospect
American Bank	Art Barstoll	(310)555-3763	Prospect
AdamsCulwren	Donald Durall	(800)555-8884	Prospect
Western Telecom	Kathy Smith	(201)555-8000	Prospect
JHill Millinery	Scott Leonardsky	(212)555-4664	Prospect
St. James Medical Center	Morley Williams	(800)555-2222	Prospect

#6 Query by Example

Unleash the power of your GoldMine data! Query and display the information you need, when you need it—with no expertise required. The new GoldMine Lookup Wizard is a centralized search tool that helps users build SQL queries to locate specific records and contact information across the GoldMine application. Not an SQL expert? No worries! With a guided by a step-by-step wizard, users can customize query parameters to quickly locate the information they need to manage their business. You can then create contact groups from your results and use them to launch actions and campaigns. The save feature allows you to store and reuse your custom queries in the future so you can quickly get the information you need to manage your business!



#7 Integrated SoftPhone⁴

A SoftPhone is now integrated in GoldMine 6.7 Corporate Edition. The GoldMine SoftPhone utilizes Session Initiation Protocol (SIP) and Voice over IP (VoIP) technology to initiate,

⁴ Requires broadband Internet connection and broadband phone service or FrontRange IP Contact Center.



transfer and receive calls. The integrated SoftPhone helps you to reduce telephone expenses by allowing you to leverage your Internet connection to make and receive your telephone calls. Manually dial a phone number or dial a contact from your GoldMine database, receive calls with caller ID for more effective call management, or forward calls to other GoldMine users or phone numbers—all via the integrated SoftPhone and your Internet connection. Just think of the money you can save by leveraging your Internet connection for your telephone needs.

#8 Productivity Enhancements

Since so much of a user's interaction with GoldMine requires data entry, viewing and navigation, GoldMine now includes a number of efficiency and productivity enhancements. Doing more in less time makes it easier to use GoldMine! From the Contact record, and the Activity List, to the Opportunity and Project Manager, sticky column headings, in various tab folders, allow users to control how details are viewed. Auto-fill options let users quickly copy contact data with just a click, eliminating the need to re-type physical and/or E-mail address information. As frequently requested, the Month view of the graphical calendar now provides an option for displaying 'Completed' activities letting users review past activities at a glance. GoldMine has improved the usability of commands by introducing graphical icons for the Main Menu and by updating the Taskbar with drag and drop support for organizing buttons, word-wrapping for button descriptions, and auto-scrolling for navigating to off-screen buttons.

#9 Redesigned Opportunity & Project Manager

The redesigned Opportunity/Project Manager simplifies the management of complex sales opportunities and projects. Now users can organize and work with opportunities and projects more quickly and easily. In addition, sales staff can gain better insights and intelligence from the Opportunity Manager's improved business logic. Both prospects and existing customers will realize greater value from their current business processes by using GoldMine's new Opportunity and Project Manager features:

Friendlier User Interface – The Opportunity/Project Manager now offers a standardized GoldMine "center"-style view that includes a new toolbar, which features instant, onscreen access to the most commonly-used functions including creating, editing, completing (closing), searching, and viewing their sales opportunity pipeline. In addition, users can share the pipeline with their team members effortlessly. In GoldMine 6.7, the pipeline is displayed in its own, sizable window for viewing or printing in full color, HTML format (via Output to HTML local menu option).

Faster Searching and Filtering – The Opportunity/Project Manager now makes it simple for users to search, filter and sort opportunities and projects within its standardized, tree-based listing, which is common to all of GoldMine's center-style views. Users can arrange information in the manner most useful for them and locate the items they need with just a few simple clicks of the mouse. **Improved Business Logic** – The Opportunity Manager offers a new process for closing deals as Won or Lost (via the new Win and Lose toolbar buttons). Users will enjoy



significant improvements based on the changes made to the underlying business logic that now support the roll-up and calculation of multiple, linked sales. Now, when sales people close any opportunity, which has multiple forecasts, related to it, and they have the ability to automatically close all of those linked sales, ensuring that opportunities and related line items are kept in sync throughout the sales cycle.

#10 Enhanced HTML Support

Users can now leverage the powerful formatting capabilities of HTML throughout various areas of GoldMine to emphasize important information about their contacts, conversations and activities, and in particular for their E-mail communication. GoldMine 6.0 now offers users a native HTML editor to create dynamic, graphical messages for single or mass e-mail merges, as well as for customizing internal notes viewable by other GoldMine users.

Scheduled and Completed Activities – Users can now enter rich, HTML formatted text in the notes field of all scheduled and completed activities, including calls, sales and appointments. The Zoom and Preview windows have been updated to allow users to experience the full richness of HTML content when viewing or previewing activities on their Activity List, Calendar or from the contact's Pending and History folders.

GM+View tab – New HTML enabled tab allows user to create and view rich, HTML based content within the GM+View tab of a contact record. Users can create HTML templates to display on the tab and include GoldMine data, graphics and other HTML elements. The GM+View tab can be configured to display a default template for all contacts or a specific template based on user-defined rules that examine the data contained on the contact record (for more details see below).

E-mail Editor – The e-mail editor is quickly and easily accessible by clicking the e-mail hyperlink on the contact record window. The updated HTML editor allows users to create rich, HTML e-mail messages and templates, using a set of predefined HTML tools (similar to those available with Microsoft Outlook/Outlook Express). Users can also easily insert hyperlinks to files, web pages or other Internet based resources. At the same time, experienced HTML authors are free to directly modify the HTML source to fine-tune their creations and apply more advanced HTML elements.

Other great reasons to upgrade!

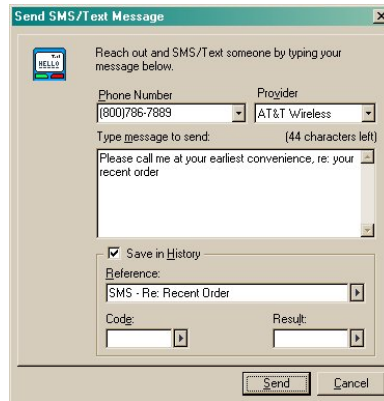
Are you a GoldMine user thinking about upgrading to GoldMine 6.7 Corporate Edition? If so, here are some additional reasons to consider.

SMS Messaging

Enjoy the hottest form of communicating with your customer by using our new text messaging capability. GoldMine once again takes the lead in providing ways to leverage technology that enables you to build stronger relationships with your customers. This feature enables you to

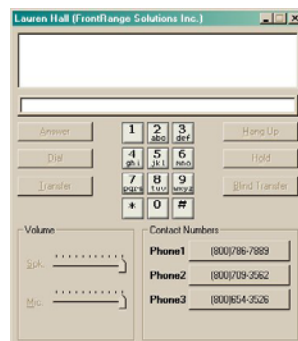


send text messages directly from GoldMine 6.7 Corporate Edition to any contact's cell phone that can accept text messaging. It is another convenient way to keep in touch with your customers and prospects and strengthen your relationships with them.



Integrated SoftPhone

A SoftPhone is now integrated in GoldMine 6.7 Corporate Edition. The GoldMine SoftPhone utilizes Session Initiation Protocol (SIP) and Voice over IP (VoIP) technology to initiate, transfer and receive calls. The integrated SoftPhone helps you to reduce telephone expenses by allowing you to leverage your Internet connection to make and receive your telephone calls. Manually dial a phone number or dial a contact from your GoldMine database, receive calls with caller ID for more effective call management, or forward calls to other GoldMine users or phone numbers—all via the integrated SoftPhone and your Internet connection. Just think of the money you can save by leveraging your Internet connection for your telephone needs.



Campaign Management Center

Now, in a snap, you can build and manage marketing campaign task lists to track activities you want to execute and contacts you wish to touch. In addition, you can track which activities have been accomplished, and which remain outstanding for each campaign. Finally, you can also see which contacts are part of each campaign.



Integration with IP Contact Center*

GoldMine 6.7 Corporate Edition now has built in integration with FrontRange Solutions' new complementary product IP Contact Center. Now provide your team seamless access to your customer and prospect information in GoldMine, as well as streamline your workflow, so you can increase customer satisfaction and lower your costs. With Screen Pop and Live Transfer of calls, customer calls can be routed based upon data from GoldMine; you can thereby ensure the appropriately skilled person handles the call. In addition, with the Click to Dial feature in GoldMine you can reduce the number of wrong numbers dialed, driving higher call volumes per agent and ensuring maximum efficiency of staff.

New Opportunity & Project Wizard

A new wizard simplifies the setup of new opportunities and projects by guiding users, step-by-step, through the initiation of an opportunity or a project. With clear and concise instructions on what information is needed to create an opportunity/project, GoldMine ensures that users can easily capture all of the critical data elements during the creation. The new Wizards help users save time and understand the sales process better, while at the same time it improves the accuracy of future sales forecasting and planning by allowing management to get more accurate reports on past and planned sales activities. The new Opportunity Manager and Project Manager Wizards make the complex process of multi-step sales opportunities and projects, simple.

Quick Start Wizard

First time users of GoldMine will get simple, step-by-step assistance with the essentials to setting up their system. Everything from bringing data into GoldMine, adding users, to customizing the most commonly used fields, applying [industry templates](#), configuring their E-mail, and integrating to key applications (such as Microsoft Word and Adobe Acrobat).

GoldMine 6.0's new Quick Start Wizard is launched automatically after users first install the system as administrators (Master-rights users), or can be launched instantly from the default Taskbar or the main menu. The Quick Start Wizard puts all of the initial, GoldMine implementation tasks into a centralized, tutorial-style workflow for new users. The Quick Start Wizard promotes and presents the relevant functions in GoldMine, with which first time users need to work, in order to get their contact management processes up and running. New users will be able to implement GoldMine faster, and enjoy an improved ROI by reducing the amount of time needed to set up the system.

Leads Management Center

Adding ease and value to the lead administration capabilities of GoldMine, Leads Management Center gives users access to tools in a *centralized location*, making it easy for them to manage



their contacts and leads. For example, the Leads Management Center allows users to set e-mail and mail merge codes, ownership and security, and other attributes.

Industry and User-specific Customizations

The new Field Properties features and GM+View tab in GoldMine 6.0 allow users in different industries, as well as users in different roles within a single organization, to work effectively with a variety of different types of information, expanding GoldMine's basic contact-centric, business-to-consumer, modeling capabilities. Administrators can control both the look and feel, as well as content of the primary (main fields above the tabs) contact screen, as well as the information displayed in the Fields and GM+View tabs. With the ability to define criteria that GoldMine will evaluate, before it displays a record onscreen, users can customize GoldMine to manage and show information as varied as that which is typically related to business entities such as leads, customers, properties, automobiles, legal cases, or insurance policies (just to name a few).

Redesigned Calendar and Scheduling Tools

The new, updated calendar provides GoldMine users with a friendly interface to simplify workflow and save time on common, repetitive time management processes. The new Calendar includes a toolbar that offers quick access to the most commonly used functions such as Schedule, Complete... and Edit....

In addition to the new look and feel, several other day/time planning and team collaboration tools have been added so that users can manage their calendars and their time more efficiently and effectively

Opportunity Manager

Adding ease of use and flexibility to your contact management strategy, the Opportunity Manager provides unique customization within GoldMine. You can add custom fields, rename fields that already exist, and change the look and feel by reordering or removing tabs to better reflect your workflow and priorities.

Are you a GoldMine user thinking about upgrading to GoldMine Corporate Edition? If so, here are some additional reasons to consider upgrading to GoldMine 6.7 Corporate Edition

#1 Microsoft® Outlook® integration

Included with each license of GoldMine Corporate Edition is our GoldMine Integration Services for Microsoft® Outlook®. This tool provides address book and email management capabilities between GoldMine and Outlook to keep all information in one central location.



#2 Account Roll-up

Account Roll-up allows you to view information in the Contacts, Details, Referrals, Pending, History, Links, Members, Tracks, Opportunities, and Projects tabs by consolidating all the contacts under the selected organization or section in the Org Chart.

#3 Manager's Console

The Manager's Console quantifies the various elements of your business into statistical groups viewable in either a bar graph or gauge format. The consolidation of facts allows you to monitor the overall health of your business and make more informed decisions.

#4 Answer Wizard

The Answer Wizard reports provide a quicker way to produce reports based on GoldMine data. There are a variety of predefined Answer Wizard reports from which you can select the one best suiting your needs. You can select from the following report categories: Account/Contact Information, Personal and Team Calendars, Past Activities, Sales Analysis, and Other Analysis

5 GoldSync

While optional for the standard version of GoldMine, our GoldSync product is included in GoldMine Corporate Edition. GoldSync automates all the processes required to keep your remote staff in sync with the central GoldMine database.

#6 Microsoft® SQL Server database

Included with GoldMine Corporate Edition is Microsoft® SQL Server, which provides more robust data management capabilities and increased dependability, stability and scalability for any size organization.

#7 Database self-tuning and management capabilities

With GoldMine a user must manually pack and re-index records periodically to maintain the integrity of the database. With GoldMine Corporate Edition, this is done automatically by the provided Microsoft® SQL Server to ensure integrity of your mission critical data.

#8 Business Intelligence tools

Included as part of Microsoft® SQL Server are some great business intelligence tools. These tools enable a user to analyze their data and even schedule reports to be emailed to users so they are always available when you need them.

#9 Crystal Reports

If you need to modify existing reports or create your own reports, you can use Crystal report writer, also included with GoldMine Corporate Edition.



#10 Web access -

Do you have remote users who want real time access to their GoldMine data? Is your sales team tired of synchronizing? If so, you may want to consider our iGoldMine and iGoldMine Plus products. These two products are add-on solutions to GoldMine Corporate Edition that allow a user to access GoldMine functionality and data from anywhere, at any time. Your IT administrators will also like our iGoldMine products because they are easy to deploy (just send a URL to your remote users) and your data is safe behind your firewall.