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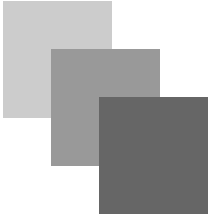
P A P E R



Customer Management

Background and Information on Customer Management Solutions

GOLDMINE
Software Corporation



Customer Management
Background and Information on Customer Management Solutions



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EXECUTIVE OVERVIEW

In today's complex business environment, organizations face global pressures that increase competition and accelerate the demand for them to deliver better products and services. These competitive pressures force organizations to find new ways to improve operational effectiveness despite shrinking margins. In this intensely competitive climate, survival is not enough. Businesses must continue to increase productivity while maintaining superior products and high-quality service. Moreover, businesses must ensure that customers are aware of new services and products, and that the business is willing to respond to their changing needs.

Today's demanding business climate mandates that companies be attentive to their most valuable asset, their customers. To be competitive, the quality of an organization's products and services must exceed the needs of its customers. Direct experience with an organization often determines how customers perceive the quality of its products. Businesses must be poised to quickly respond to shifts in market conditions, and to recognize and react to their customers' needs. An organization's responsiveness depends on an understanding of its marketplace and detailed knowledge of current and future customers. Gathering, storing and presenting information in a meaningful way is the best method of truly knowing and understanding the customer.

Information management is a key element in a business' decision-making process. With the emergence of the Internet, Intranets, and improved customer service programs, information is easy to come by, but often difficult to organize and share. When a company optimizes and controls the flow of information internally, as well as to and from its customers, its business is bound to improve.

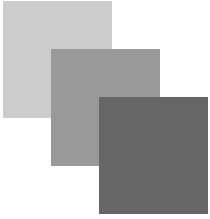
GoldMine[®] offers organizations a Technology Enabled Selling (TES) solution that transforms information into an asset—one that can be leveraged to improve business. Through GoldMine's powerful tools, businesses can actually create new revenue opportunities from the information stored in their data pool(s).

Organizations can use GoldMine to optimize their business processes and deliver products and value-added services tailored to their customers' needs. GoldMine serves as the integrator of an organization's workflow, ensuring that the business process of supporting and retaining customers is optimized.

By capturing current and prospective customer information, a company is well positioned to quickly detect changes in the business climate and offer real-time responses and solutions. But organizations must do more than just gather data if they are to win the minds of their customers. Successful organizations require systems that put them close to their customers by delivering information on demand. These systems reduce labor costs, improve customer service, and shorten time-to-market cycles. To facilitate customer management, these solutions must be part of the business' internal communications strategy.

GoldMine provides this solution by putting information in front of the employees who are closest to the customer and by delivering this data to the rest of the organization. Moreover, no matter where information is first created (customer service, marketing, sales, R & D), GoldMine gives every user access to customer-specific information. Not only does an organization have instant access to the complete history of all transactions between their employees and the customer, but it also gains full insight into these interactions.

In addition to logging valuable customer information gathered through direct customer contact, GoldMine strengthens the management of these customer relationships with correspondence via e-mail, letters and even faxes. GoldMine offers organizations the means to secure and keep customers by storing a comprehensive account of all business-to-customer interactions. By collecting and centralizing all of the



information flowing through an organization, GoldMine allows a business' internal operations to work in concert with one another, thereby reducing task duplication. The result is that every employee works productively to turn contacts into customers and customers into clients for life.

This white paper discusses the specific features and benefits integrated into the GoldMine 4.0 product family. Organizations of any size can apply these features to improve the effectiveness of their business processes. In addition, this paper discusses how different groups within an organization can use GoldMine to streamline their own operations and redirect focus to their customers' needs.





SETTING THE STAGE: MANAGING INFORMATION AND RELATIONSHIPS

Historically, sales people gathered leads on slips of paper, thus beginning the widely accepted form of managing contact information. With the arrival of the Information Age began rudimentary, PC-based, personal information management programs. These early solutions were little more than glorified electronic Rolodexes.

As technology improved, electronic Rolodexes gave way to contact management programs such as ACT!®, and telemarketing programs such as TeleMagic®. These programs combined day and time planning, limited database support, and basic document processing in a single package, but were mainly focused on addressing the needs of stand-alone users. While functional, these early solutions did not offer the salesperson, the primary audience for contact management technology, any distinct “sales tools” such as forecasting or pipeline management. Most significantly, these applications did not allow a team of salespeople to share timely account information.

Sales people and sales management have always needed accurate and complete real-time updates on every prospect. But sales teams are not the only people who need access to this vital data. To tailor programs and products to customers' specific needs, marketing teams need to access and analyze information collected from every department within an organization. In fact, support and customer service are two departments that are typically critical to the customer information mix. Additionally, executive management needs to be informed about the trends in their business, as well as to be aware of department and staff interaction.

In 1989, a group of highly talented software engineers with extensive networking backgrounds set out to create a manufacturing-based accounting package. As sales began to grow, they decided that they needed a contact management solution. As a small organization, they could not justify an expensive (and complex) Sales Force Automation (SFA) package, yet none of the off-the-shelf software available at the time was powerful enough to meet their needs. To solve this problem, they created their own unique “workgroup contact management” solution now known as GoldMine.

The expertise and planning that went into the first release of GoldMine (version 1.03) enabled it to technologically leapfrog the contact management competition. In fact, so much forethought went into the design of GoldMine's original workgroup contact management program that, while none of the original code exists in today's shipping version, GoldMine 4.0 Standard Edition for Windows 95/98 4.0 and NT still has the same core design.

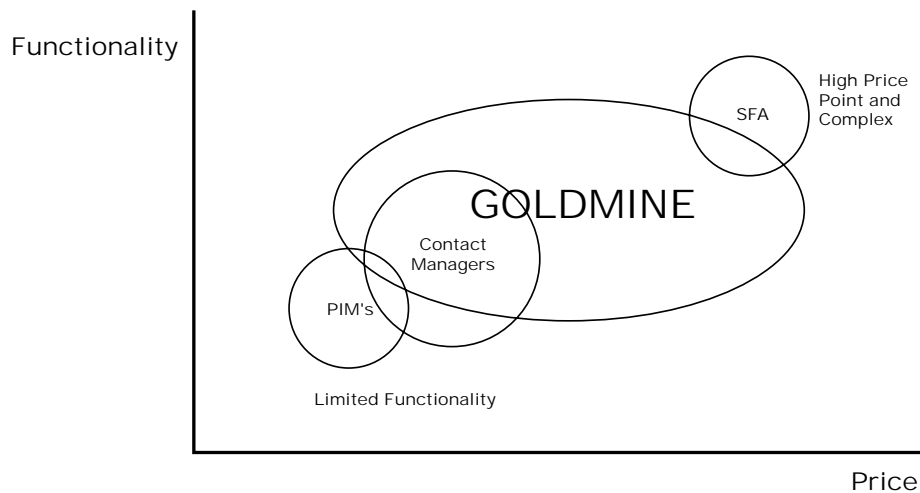
GoldMine capitalizes on an organization's most pervasive business tools. Utilizing an organization's network to get information distributed to sales people as soon as it becomes available is critical to maintaining a competitive position in today's market. Only GoldMine offers advanced LAN/WAN capabilities to suit any corporation's data distribution requirements. In addition, with a worldwide marketplace, organizations need to access real-time information and updates through synchronization of databases. A value-added contact management solution should be flexible enough to deal with a salesperson's ever-changing schedule and mobile environment. GoldMine provides this solution not only by supporting modem updates (calling out and receiving), but also by integrating e-mail, LAN/WAN synchronization, Remote Access Solutions (RAS), and advanced Internet connectivity.



THE CHALLENGE: LEVERAGING TECHNOLOGY ENABLED SELLING (TES)

Currently, the contact management marketplace encompasses a wide variety of products, and the level of functionality and customization of each product is directly related to its price. Basic contact managers own the majority of this marketplace, while SFA packages target a specific market segment where organizations can afford to purchase and maintain complicated, high-priced sales tools.

On the low end, Personal Information Managers (PIMs) are still targeted at users with little need for relationship or transaction information. One step up, contact managers are aimed at sales professionals, small to mid-size organizations, and autonomous workgroups or departments within Fortune 1000 enterprises. This market space requires some information sharing and relationship tracking so customers will initially look toward the high end of the market for solutions. They need the power, customization and sales tools offered by SFA packages, but they simply cannot afford the cost and complexities. Therefore, these users are often forced to settle for contact management solutions, leaving them without the tools they need to fully enable their businesses.



GoldMine is the only solution that bridges the gap between traditional contact management software and SFA packages. As a workgroup solution, GoldMine offers users the familiarity, simplicity, and small resource footprint of an off-the-shelf contact manager, but combines ease-of-use with powerful automation and enterprise features previously only available in SFA packages.



THE SOLUTION: THE POWER OF GOLDMINE

While many contact managers claim to be “network-able,” they simply do not succeed as workgroup solutions because they were originally designed as stand-alone contact managers. GoldMine’s designers understood the challenges involved in implementing workgroup solutions because many came from networking backgrounds, and designed GoldMine to meet the needs of the workgroup. As a result, GoldMine is a true, multi-user database that supports concurrent data access across any network platform to a central server. This model allows administrators to implement security and customizations for their workgroups.

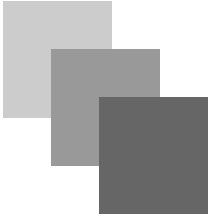
Implementing a secure workgroup environment allows organizations to create a database hierarchy wherein different departments can view information specific to their needs. Using GoldMine, executive management can view the entire database and gather forecasts and quotas to see how sales are going in the current period, and to get an outlook on future periods. In addition, marketing can get not only the response results of a program, but also obtain specific information about what ‘closed’ a deal, or how long the sales lead lasted. Finally, sales people can then concentrate on their own territories without the confusion of excessive information.

Because an organization’s business model drives its success, the functionality of its information management is directly tied to this result. Therefore, the first step to any successful contact management implementation is tailoring a system that efficiently and dynamically tracks the information critical to an organization’s business model. GoldMine makes available thirty pre-defined database fields that are common to most businesses, and also provides users the option to add over 900 additional user-defined database fields. These custom fields can be numeric, date, or character-based. GoldMine also offers users an unlimited number of “profile” fields that support an unlimited number of indices, a one-to-many relationships between fields, and a record-by-record uniqueness. These custom and profile fields can then be set up in user-defined views. When an organization standardizes on GoldMine, it can rest assured that it will have the flexibility to customize for specific needs.

Since many organizations are redefining their business models, fewer people are responsible for managing more information. As a result, businesses have been forced to rely more heavily on their own communications infrastructure. While every contact manager on the market allows users to enter information into the database, only GoldMine tracks and itemizes the specifics of every contact interaction, including what, when and—even more importantly—who was involved with the contact. GoldMine has built-in tracking that logs which user created or last changed a record, as well as who completed any type of transaction such as a call or meeting. At a glance, users can see what they have said to a customer and what the rest of their team has said to that same customer. In addition, GoldMine offers powerful task delegation and tracking that enable workers to communicate about contacts, information and entries in their GoldMine database.

A Scalable Solution

Every business plans for growth, and, in the long run, only those solutions that can grow with a business are viable. GoldMine’s basic architecture allows organizations of any size to implement it with confidence. No matter how quickly a company is growing, GoldMine will continue to meet its needs. All of the tools needed to handle the enterprise are built into GoldMine’s Standard Edition. Initially, small organizations and large organizations with small workgroups may not require the back-end database support of an SQL server, however as their businesses and customer management data needs grow and as their customer lists expand, they can migrate to GoldMine’s Enterprise Edition.



The beauty of GoldMine is that it will expand to meet the needs of a growing business. Whether benefiting the entrepreneur, the smaller 5-100 person business or large corporations such as Bank of America and Sprint PCS, GoldMine offers the unique flexibility to adapt to any business environment.

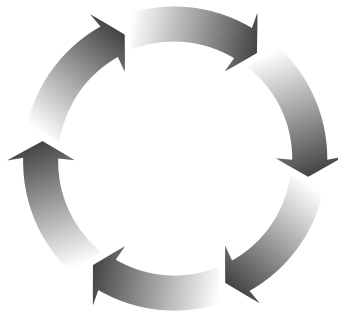




UNITING AN ORGANIZATION WITH GOLDMINE

The communications revolution has placed massive amounts of information at the fingertips of those who want to access it, which in turn has allowed organizations to become geographically decentralized. In fact, it is quite common to have headquarters in one area, product development in another region, and salespeople scattered nationally and internationally. To be effective, organizations must be able to disseminate customer information to every employee who needs it. GoldMine enables different departments within an organization to work with information collected by those who are closest to the customer.

Implementing a shared customer management tool means managing information that can be used by every department:



Sales • Marketing • Customer Service • Accounting • Management

Sales

GoldMine empowers salespeople to track potential and completed sales data for each contact. GoldMine also allows them to track whether a prospect is 'hot' or not. Being marked as a hot lead, a prospect can be pushed to the top of the priority queue, and other sales-support team members will know to be proactive in focusing on it. If a lead is not hot, but has future potential, the salesperson can create alarmed ticklers or reminders to call the customer periodically. Similarly, sales professionals can use GoldMine to sort and organize their leads by their interest, revenue potential, or any other pre-defined criteria stored within GoldMine's database.

For more complex sales models, an Opportunity Management System (OMS) gives sales people the ability to build complete profiles of each account. Since successful selling is based on a salesperson's ability to understand the needs and wants of the prospect or customer, customer knowledge is critical. With GoldMine, sales people can organize, manage and focus on specific account information such as influencer roles, competitors, hot issues and associated milestones or tasks using OMS. Since each opportunity can involve multiple buyers, multiple individual sales and multiple sales team members, OMS gives salespeople the ability to create a centralized view of an account to ensure complete tactical coverage of the opportunity.

Because communication is an organization's most powerful sales tool, customer interaction must be tracked on all levels. Forming the "big picture" requires the ability to track external and internal communications



that relate to a customer. GoldMine manages all communications so that sales people can provide customers with the most accurate and up-to-date responses. Any call, meeting or task notes are instantly accessible and logically organized by chronology and internal user.

To further address the needs of team selling, GoldMine contains built-in task delegation, RSVP notification, conference scheduling, and conflict checking. These tools help salespeople get their job done quickly and efficiently by allowing them to focus on closing deals instead of logistics. For instance, literature requests can be initiated by sales representatives in the field, and then sent to fulfillment departments at the home office.

Marketing

For a salesperson to get leads, marketing must create demand. Demand creation relies heavily on three things: having a good product, knowing what current and future customers want, and clear communication of the product's benefits as they relate to the customer's needs. While GoldMine cannot create a product, it can help a marketing group determine customer needs and evaluate campaign effectiveness.

Because it is difficult, and expensive, for organizations to determine the effectiveness of their campaigns, marketing dollars are often misspent. GoldMine not only tracks customers, but also has the ability to find out how an organization gained these customers. This allows marketing to analyze its promotions and campaigns and determine where future marketing dollars should be spent. And because salespeople are constantly in contact with customers, marketing can create reports showing important feedback that can be used to generate new campaigns.

Customer Service

Through Automated Processes™ (AP), GoldMine offers a powerful tool to help streamline sales, marketing and customer service efforts. In most organizations, salespeople spend a lot of time on non-sales related activities such as prospecting, servicing existing accounts, scheduling deliveries/installations, preparing reports, and responding to unplanned inquiries. GoldMine's AP relieves the sales force of these tasks. Organizations create a planned approach to target prospects, and use AP to carry out the plan. This approach can include properly timed communication such as letters, faxes and e-mails. This powerful tool ensures that a company keeps top-of-mind positioning with customers and contacts. GoldMine's AP supports a nurtured selling approach to help keep relationships strong and build customers for life.

Qualifying leads through telesales is just as critical as marketing's lead generation programs. GoldMine offers a full Marketing Encyclopedia System (MES) through its InfoCenter™, an online KnowledgeBase and document reference library that serves as a central storehouse for key data. MES includes logically branching scripts that can guide telesales representatives through their calls and the document reference library that provides instant access to marketing information. Telesales can use the MES to handle the time-consuming prospect qualification to determine interest or buy levels. The lead information that a call center gathers can be used to generate sales directly from the telesales department, or to efficiently pass lead information on to the sales force.

Accounting

Once a lead becomes a customer, GoldMine can be augmented to inter-operate with many popular accounting programs. This closed-loop approach to information management ensures that sales and accounting are working together to create a complete customer profile. For instance, an accounting



department can enter information on a customer's credit limit and allow the sales team to generate proposals accordingly. Moreover, by sharing key information they can both work to help keep their customers on good terms.

For a complete listing of GoldMine's accounting compatibility and individual features please refer to GoldMine Software Corporation's Web site at www.goldminesw.com/addons.

Management

Ensuring that everyone has access to information is a tactical necessity for any business. However the strategic advantage results when management can, at any given time, get a clear snapshot of their business. Using GoldMine, management can track what different departments are communicating with one another about products, customers, and prospects. In fact, management can use GoldMine to forecast future revenue based on the current and future quarters' aggregate potential sales. In addition, any managerial decisions pertaining to a customer can be logged, and every employee becomes accountable for subsequent actions.

Using GoldMine, sales managers can view what each salesperson is doing, or get an account-by-account view of how their salespeople are performing against their quota. By using forecasting, they can also predict how they will be doing in the future. This ability then enables management to direct marketing to plan accordingly to eliminate the cyclical "valleys" in sales.

Management can use GoldMine's unique graphical and data presentation capabilities to analyze sales based on any criteria stored in the database. For instance, a manager can create a report that shows sales by region, by account manager, or by individual product. The information can then be presented as text, or more intuitively with graphs to support trend analysis.



A SINGLE SOURCE OF INFORMATION

InfoCenter™

When an organization's infrastructure has departments in distributed facilities and salespeople in the field, sharing important information becomes difficult. As mentioned previously, to mitigate the problems of real-time information sharing, GoldMine designed the InfoCenter. The InfoCenter has many beneficial uses that not only make remote reporting of information easier for salespeople, but it also simplifies basic business needs. For example, it is arduous and often costly to distribute an entire employee handbook to each worker every time it is updated. The human resources department can place the employee handbook in the InfoCenter, and everyone can access it. Whenever the handbook is updated, the new information is automatically posted and available in the InfoCenter.

Individuals can also personalize the InfoCenter to store information that may not belong in the general GoldMine database. The information in their personal-base is not distributed to the general work community and remains private and secure.

Workgroup Scheduling and Tasking

Being a part of an organization means much more than working in a vacuum, it means being a part of a team that successfully manages its time and resources. GoldMine can schedule meetings by sifting through the list of attendees and available resources (such as conference rooms) to find the best time and location. The meeting appears in the attending user's calendar window, and before the meeting is scheduled to take place, GoldMine can send an e-mail reminder and a pop-up alarm.

GoldMine's scheduling isn't limited to meetings. Salespeople, marketing teams, and management have extremely busy schedules, and sometimes it is difficult to remember the small tasks it takes to be successful. To assist users, GoldMine has a comprehensive set of scheduling tools to ensure that nothing slips through the cracks—whether it is a call to a customer to check up on how she or he is doing, an open forecast, or even a reminder of a key contact's birthday.

Customized Views for Business Insight

While employees need to work together, they also need individual information requirements satisfied. Therefore, GoldMine allows all users to customize their view so that they can streamline information to maximize productivity.

GoldMine also offers an Organization Chart feature that allows users to look at their customers logically by hierarchy or by other relationships. Through this graphical representation, it quickly becomes apparent who an account's decision-makers are and, therefore, who requires the most attention during the sales process. If a key person at an account leaves, the Organization Chart quickly tells users who the next key contact may be and allows that person to be instated as the primary contact.

Managing Every Opportunity

While GoldMine has always delivered tools to help users focus on sales, GoldMine 4.0 incorporates a true Opportunity Management System (OMS) through its Opportunity Manager. The new Opportunity Manager is based on the Miller/Heiman Strategic Selling model. This new enhancement allows organizations to make the most out of every sales lead.



Once a lead has been generated, the Opportunity Manager provides assistance to ensure that salespeople deliver sales. Salespeople can use the Opportunity Manager to keep track of key account information such as influencers, team members, competitors, associated potential forecasts, as well as any special issues. In addition, a record of all pending activities and detailed communication and transaction information on the account are maintained. At any moment the salesperson knows what was said, when it was said, and who said it. Finally, the salesperson can use the Opportunity Manager to create a sales timeline to ensure that prospect expectations are met in a systematic and timely manner.

Workgroup and Individual Security

Although “information is power,” sensitive information should not be available to everyone. GoldMine has multiple levels of security that can be customized for different groups within an organization, and can be customized to serve the needs of individual users within those groups. Users see only the information that they need to see and are not distracted by unnecessary information. More importantly, sensitive information remains confidential.

To ensure security, GoldMine has comprehensive controls that reduce the possibility of an unauthorized user gaining access to valuable contact information. The first level of this security is basic password-level protection. Beyond that, GoldMine offers menu level, database level, record-level, and transaction-level security.

Remote Data Synchronization

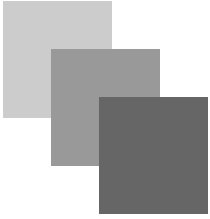
GoldMine, as a workgroup customer management solution, encourages collaboration from people across different departments to ensure that data is accurate and that updates are timely. While data entry is still the responsibility of individual users, GoldMine handles the task of reconciling and reproducing it.

Synchronization is the process whereby individual record updates made on multiple, disparate systems are merged into a main database. GoldMine provides a robust set of tools that give users flexibility when synchronizing their databases. These tools include different options for synchronizing their databases and also for reconciling the chronology of different database updates. For local (LAN-based) users, data is stored on a central server and updated real-time, therefore synchronization is not a concern. However, for remote users, synchronization is a must.

Often, there is little (if any) assurance that individual salespeople will be in the same place from day to day. Users cannot rely on the same connection method to synchronize their databases. It is of paramount importance that a solution provides different vehicles for database synchronization. GoldMine gives field users the choice to synchronize their databases by having a server call them or by their calling the server. The GoldMine administrator can choose how a user can synchronize, or can give the user the flexibility to choose.

Utilizing Intranets

GoldMine has addressed the importance of internal information dissemination since its inception. Today, organizations are leveraging Web interfaces and secure IP protocols to distribute information to their employees. This ‘new’ paradigm is not so new to GoldMine. In keeping with GoldMine Software Corporation’s drive to be on the leading edge of technology, GoldMine offers a comprehensive set of Intranet tools that allow local and remote users to access their GoldMine database.



Security is a major concern when distributing Intranet information over a public network like the Internet. GoldMine makes accommodations to ensure that data remains secure, even when sensitive information traverses public transmission facilities.

GoldMine's newest method for getting information out into the field is direct IP-to-IP synchronization, which ensures that information traveling over the Internet is point-to-point. Secure transmission is achieved by certifying that the sending and receiving devices' IP addresses remain consistent. Thereby, if someone tries to 'spoof' an IP address, communication is immediately dropped.



LEVERAGING THE INTERNET

GoldMine offers intelligence that allows an organization to strategically launch cohesive marketing and sales campaigns that hone in on their customers' wishes. To ensure the tactical success of these sales and marketing campaigns, GoldMine can use the most powerful and readily accessible tool that business has today, the Internet.

Although it is established as the preeminent communications technology of the new century, organizations often find it difficult to harness the Internet's power. GoldMine Software Corporation has led the customer management industry in its Internet-integration strategies, seamlessly adapting Internet e-mail and Web technologies and logically incorporating these resources into its workgroup customer management model. GoldMine leverages the Internet as a tool that organizations can use to increase sales.

Sending and Receiving Internet E-mail

GoldMine was the first contact manager to integrate Internet e-mail. Other packages quickly followed suit, but instead of using standards-based Simple Mail Transfer Protocol (SMTP) or Post Office Protocol (POP) e-mail, these packages chose to align themselves with proprietary e-mail systems. This forced their customers to adopt proprietary e-mail in order to take advantage of the functionality.

GoldMine uses the Internet as an extension of its standard selection of communication tools. All e-mail correspondence sent to a contact is logged in that contact's GoldMine record. Instead of weeding through an e-mail program's in-box to find messages to and from a specific contact, all correspondence is automatically linked to each contact's history. This logical integration of e-mail communications is still absent from other contact managers.

In addition, since GoldMine uses standards-based POP and SMTP mail, Internet Universal Resource Locators (URLs) can be sent through e-mails to produce hot links that can launch an Internet browser. This functionality ensures that employees waste no time with URL look-ups, and the URL remains in GoldMine's database for future reference.

Collecting and capturing Web page data into GoldMine

The Internet is not just a valuable information-gathering tool—it also provides a company with the ability to communicate with the world. Marketing programs that use the Internet to generate leads should also have the ability to capture those leads. Any Web site can be set up to collect lead data: the key to a business' success is translating that captured information into valuable sales leads. Only GoldMine allows organizations to create CGI or PERL scripts that collect data from a Web site's HTML form and then have that data automatically imported into GoldMine. This Interactive Selling System (ISS) works hand-in-hand with GoldMine's Automated Processes to ensure that every lead is handled. Information can be sent to the prospect, and follow-ups can be scheduled for salespeople—automatically.



THE FUTURE WITH THE GOLDMINE 4.0 PRODUCT FAMILY

Corporations, large and small, now use new technologies (e.g., the Internet, improved databases, and new communications facilities) to improve their business processes. In its ongoing efforts to meet these ever-changing needs, GoldMine Software Corporation has developed the GoldMine 4.0 Product Family.

GoldMine 4.0 continues to leverage the Windows 95/98 and Windows NT graphical user interface and the 32-bit multithreaded, multi-processor operating system, and offers a true, scaleable enterprise solution with its optional client/server support.

GoldMine 4.0 Standard Edition

GoldMine 4.0 Standard Edition uses state-of-the-art dBASE IV¹. This structure change decreases access times and offers more efficient index maintenance utilities. By using a new, more powerful version of dBASE, GoldMine continues its tradition of providing the most robust workgroup contact manager in the market. Unlike other contact managers that require users to make sacrifices when changing their database (which is typically a requirement with every new version), GoldMine 4.0 Standard Edition makes the change straightforward and clean. GoldMine 4.0 Standard Edition uses a Windows 95 wizard approach allowing users to make the transition from 3.2 to 4.0 easily and quickly, but most importantly without sacrificing any client data.

GoldMine 4.0 Enterprise Edition - Scalability and Transparent SQL Support

Many organizations have implemented advanced, function-specific databases to manage inventory, production, and finance. Often, different departments use different databases. For instance, manufacturing may use Oracle[®], support may use Microsoft[®] SQL Server[™], and engineering may store information in Interbase. To unify an organization, a contact management solution must be able to bridge the gap between these different databases.

GoldMine 4.0's Enterprise Edition can host information in any of these powerful SQL databases. By using GoldMine 4.0 with GoldSync[®] 4.0, individuals in different departments can access GoldMine information from their own, native databases. An organization can start out with GoldMine 4.0 Standard Edition and then transparently rehost the dBASE information to the SQL database of choice, taking information from dBASE 4.0 format and converting it to Microsoft SQL Server, Oracle, and others.

For organizations with multiple, different SQL databases, administrators can choose to configure GoldSync 4.0 to synchronize data between these different SQL database formats at pre-determined times to ensure that the information users are accessing is always current.

In addition to the gains in scalability and portability offered by the GoldMine 4.0 product family, organizations also enjoy significant costs savings. Since GoldSync 4.0 synchronizes data between different database formats, remote offices or users (that have notebooks or smaller databases and cannot, or do not require SQL databases) can run GoldMine 4.0 Standard Edition on their systems and avoid the associated hardware and licensing costs of most client/server applications.

¹ With the release of GoldMine 4.0, all of GoldMine's products are no longer backward compatible. GoldMine 4.0/GoldSync 4.0 cannot be used with any GoldMine 3.x, 2.x or GoldSync 1.x versions.



GoldSync 4.0 Synchronization Server

Since every organization has different synchronization needs and requirements, GoldMine Software Corporation developed GoldSync. As an advanced communications solution, GoldSync includes provisions to ensure that data remains secure during synchronization. GoldSync also offers enhanced controls that an administrator can use to filter the data being sent and retrieved. For large enterprise users, GoldSync also offers support connection methods other than analog telephone lines, including T1, Frame Relay, modem pools and IP to IP.

Synchronizing via IP to IP Synchronization (Direct Internet)



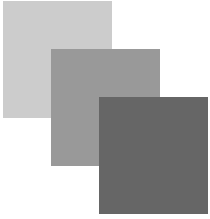
Any wide area access time is expensive. To keep long distance calling costs low, GoldSync's advanced features monitor the database on a per-user basis. This ensures that remote users receive only the database information that is new to them since their last call, eliminating the delivery of redundant information.

With all of the functionality of the GoldSync 4.0 Synchronization Server, organizations can easily deploy scaleable synchronization configurations. Smaller organizations can still use one modem or a pool of modems. Large organizations that are spread out can use T1 transmission facilities between major offices and still use a modem pool to distribute information to nearby sales people.

Integrating with Other Applications

Any application in use at an organization needs to be inter-operable with existing or pending applications. GoldMine uses Microsoft's Dynamic Data Exchange (DDE) standard to support heterogeneous environments. GoldMine can merge customer information into applications such as Microsoft Word®, AmiPRO, WordPerfect®, WinFaxPRO® and Microsoft Excel® for complete correspondence tracking.

Any correspondence generated through these applications can be linked into a contact's GoldMine record. Once again, this ensures that there is a complete record for every communication between an organization and its customers.



CONCLUSION

Most businesses lose 15 to 35 percent of their customers annually! Lack of communication between clients and companies is one of the chief reasons that customers decide to take their business elsewhere. Keeping customers is a vital mission for any company.

Certainly there are no guarantees for winning and retaining customers, but GoldMine provides users the tools necessary to keep track of every customer, large or small. GoldMine provides methodical procedures that help turn new prospects into customers, first-time customers into repeat customers, and repeat customers into lifelong advocates. With GoldMine's powerful features, an organization can improve its overall information management, sales process and, ultimately, the way it does business.

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