



- *Create a Custom Look and Feel* - Each user has their own approach to information management, and every user has different priorities. With My GoldMine, they can control not just what content is available, but also how that content is displayed. Users can choose My GoldMine's colors, fonts, column layouts, or heading styles. My GoldMine also offers pre-defined "skins" or sample layouts that include default, newspaper and organizer templates
- *Control Settings to Suit Specific Needs* - My GoldMine automatically updates based on user-defined intervals, but users can manually refresh based on their connection, bandwidth, and information requirements. Users can also control the window size, display status, as well as date and time formats to suit My GoldMine to their specifications

#2 Built-in Database Back-up and Restore Wizards

The data in GoldMine is critical to all of its users and now, GoldMine 6.0 includes a built-in Database Back-up Wizard, allowing administrators to easily and quickly safeguard their GoldMine data. The GoldMine Database Back-up Wizard even allows users to back-up files external to GoldMine, such as e-mail attachments, Linked Documents, Word and Reports Templates. Administrators can save time by setting up Database Back-up Profiles, which store common Database Back-up Wizard options, for repeated use and one-click access.

In addition, to the built-in ability for users to back up their data, GoldMine 6.0 now also includes a Database Restore Wizard. Since the key the purpose of backing up data is to make available for re-use/recall in the event of database corruption to prevent information loss, the Database Restore Wizard allows administrators to easily and quickly retrieve data from any Back-up set created by the Database Back-up Wizard.

#3 Easy-to-use Search Center

With GoldMine 6.0, users will now have a simpler, more intuitive, and centralized tool for everything from the most frequently used searches (such as looking up a contact by name, company, phone, etc.) to basic searches (including looking up contacts that do not belong in a particular state), to multi-criteria "Power" searches such as available with GoldMine's filters. The new Contact Search Center replaces the Contact Listing and offers the following enhancements to usability:

- *Work with a "spreadsheet"-style listing of contacts* - searching for contacts is even easier now that GoldMine 6.0 offers users the ability to add more columns to the prior, limited 3-column display. In addition, when users choose indexed fields for the listing of contacts in the Contact Search Center, they can click on column headings to sort in ascending and descending order for simpler and faster list management.



- *Get easy access to search functions and options via new Toolbar* - the Contact Search Center offers a standardized Toolbar with easy-to-view buttons for expanding/shrinking the window, for enabling the Power search, to optimize the search for speed, to save the search results, and for making the results available in Excel, Word, etc. (via the popular Output to... function).
- *Perform most common searches from a single window* - users now have one place to go to do both run basic searches (including searching by E-mail Addresses) and build advanced searches, as well as manage all of their saved searches (such as Filters, Groups and SQL Queries) in GoldMine's standard Tree-style view. In addition, the new centralized search tool also lets users activate, drill-down, or release the members of the searches after building and saving them, making it faster and easier to look up information in GoldMine than ever before.

#4 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 6.0, 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).
- *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.
- *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.

#5 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.

#6 QuickStart 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 QuickStart 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 QuickStart Wizard puts all of the initial, GoldMine implementation tasks into a centralized, tutorial-style workflow for new users. The QuickStart 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.

#7 Enhanced HTML Support

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



- **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.
- **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.
- **InfoCenter** – Users can use the same rich, HTML-formatted content available in the above areas of GoldMine in the Topic pages of their PersonalBase or Knowledgebase systems and customize the look and feel of the InfoCenter to improve internal information sharing.

#8 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).

The new "record typing" functionality in GoldMine 6.0 available with the **Field Properties** and **GM+View** help users see information that's relevant to them in the way that makes sense to them:



- The **Field Properties** options allow administrators to control not only what fields are called (labeled), and which fields and field values will be displayed, but also the colors for the field labels and values. Administrators can specify either expressions or colors for both field labels and their values. With these customization capabilities, Real Estate users (for instance) could see a screen with one set of contact1/contact2 fields for a buyer, another screen for a seller, and yet another screen for a property. Users can also be visually notified of important information or changes in the status of a contact based on the value of a field. For example, if a customer's account is past due, GoldMine can change the color of a field defined as Credit Status field to the color red, for fast viewing.
- The **GM+View** tab offers administrators the ability to create an unlimited number of rich, HTML forms with content that can be pulled from GoldMine, as well as from sources external to GoldMine. In addition to the ability to create custom tab forms with contact information, macros and expression values, images, tables, hyperlinks and even dynamic data feeds¹, administrators can also define "Rules", that determine which of the tab forms are displayed for a given contact record based on the following criteria: values from fields on the contact record itself, expressions that evaluate information on the contact record or in the database, or even by user selection.

For instance, basing the **GM+View** tab display on a value from a field allows GoldMine to display a warranty screen if the customer record has a value of "Active" in a field set as Warrant Status. Alternatively, the **GM+View** tab can be available based on user selection, similar to the way the **Fields** tab screens currently function, based on a user's group membership. Lastly, GoldMine can also determine which **GM+View** tab should be shown, based on a virtually limitless set of logical conditions that evaluate data from the system - e.g., the expression `File:USERINGRP("Admin")?\\documents and settings\sales\product info\Categories.txt` tells GoldMine to determine if the logged user is a member of the "Admin" User Group, and if they are, to have GoldMine display the contents of the file reference (which is located on the network) in the **GM+View**.

#9 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**, **Zoom**, navigate to dates, specifying activities for display, **Delete**, and **Edit**.

¹ Requires Administrators, FAST Partners, or Technology Partners have ability to write Java script applets as needed within html pages.



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. These features include:

- *Mass Activity Completion and Deletion** – Users may now complete or delete multiple activities in a single process via the new **Auto-Update** tools. From the Activity List, Calendar, or Pending tab, users will be able to complete or delete activities en masse by right-clicking and selecting the appropriate local menu option (**Options | Auto-Update Complete** (or **Delete**)).
- *Richer Holidays Support** – When choosing to display Holidays on their calendars (access via **Edit | Preferences | Calendar** tab), users may now import holidays from a pre-defined list of national and religious holidays (including the United States, Canada, the United Kingdom, France, Australia, Germany and Christian, Islamic and Jewish religious holidays) or they can create their own custom holiday list for other countries, religions or company-based categories. Holidays now have a display area at the top of the calendar's Day and Week views.
- *Support for Calendar Display of Occasions* – New functionality allowing users to define and display special occasions on their calendar (e.g., birthdays, anniversaries, policy renewal dates, employee review dates). These occasions may be linked to a specific contact or remain unlinked and personal to the user. Occasions are viewed from the new timeless area of the Calendar, the new Occasions tab in the Activity List, or from a contact's Pending folder.
- *Meeting Requests for Multiple Contacts and GoldMine Users* – Users may now schedule meetings and send meeting requests to multiple contacts and GoldMine users from the standard **Schedule** window. To add multiple attendees, the user clicks the magnifying glass and contact button next to the **Contact(s)** field on the **Details** tab of the **Schedule** window, and then edits the list by clicking the **New** and/or **Remove** buttons on the corresponding **Contact(s)** and/or **User(s)** tabs that appear.

#10 XML Integration

GoldMine 6.0 now allows users to export and import data in XML format, which has fast-become the standard for data transformation. Previously, GoldMine users could import and export primary and user-defined contact information such as name, address, phone, e-mail address and website only. To import or export other contact-related data such as associated schedules or history, users worked with popular third-party applications such as [GoldBox](#) and [InaPort](#).²

* Indicates highly requested functionality by end user.

² These third party applications continue to provide more advanced import and export capabilities than GoldMine 6.0. GoldMine 6.0's XML feature allows users to import or export data relating to contacts; these utilities allow users to work with data in the InfoCenter, F2 lookup lists, the Org Chart, and many other areas of GoldMine. Plus, they provide the ability to read from many file formats such as Excel, ODBC data files, even Lotus Notes and other programs. If users require these advanced features, it is recommended that they contact the technology partners listed above.



With the latest version of GoldMine, users can import and export primary contact information, as well as any associated secondary contacts, calendars, histories, Detail, Link records, and more, using XML. Users can now work with FAST Partners, their own IT staff or developers for other applications to integrate GoldMine's contact information with third-party applications, such as accounting programs or ERP systems, that support XML. In addition, GoldMine 6.0 allows users to automatically save and then publish via the FrontRange Web site the associated XML schema of any set of exported data, making it even easier to integrate GoldMine into a user's entire business and information management process. This functionality can be accessed via **Tools | Import/Export Wizard | Import GoldMine data from an XML file** or **Export GoldMine data to an XML file**.

GoldMine 6.0 is a major upgrade that also offers dozens and dozens of other enhancements and improvements in usability including:

- *Recurring Forecasts^{*} and Quota Scheduling* – New functionality allowing users to schedule recurring forecasts and quotas on a weekly, monthly, quarterly or yearly basis providing quicker and easier administration of the sales process
- *Competitive Information Collection* – Users can now identify opportunity competitors and collect and store relevant details (e.g., competing product, rating, status, strengths, weaknesses) for later reuse
- *Document Management Center Folders^{*}* – New support for unlimited, user-defined folders allows users to better organize and manage any variety and number of document templates for personal or shared usage
- *Full Username Displays* – Ability to display user's 8-character Login Username with full name, or full name then Username in any listing with user information such as History, Pending tab, Calendar or Activity List.
- *Contact or Calendar PDA Synchronization^{*}* – Option for users to synchronize just contact or calendar information to and from Outlook, Palm OS or Pocket PC devices to streamline updates
- *Org Chart Functions* – New support for users to specify entry-level security for Read and Write (Update) access based on users and user groups (audit information on the creation and last modification is also available), as well as for users, with access, to copy/paste Org Chart, Section and Contact information directly to Word, Excel, or the Windows Clipboard via new **Output to...** local menu.

So, tell customers to take advantage of GoldMine 6.0, and lets start Creating Customers for Life, today!

^{*} Indicates highly requested functionality by end user.