



How GoldMine Works

A simple overview of the functions and functionality of GoldMine corporate edition. Also available in small business edition.

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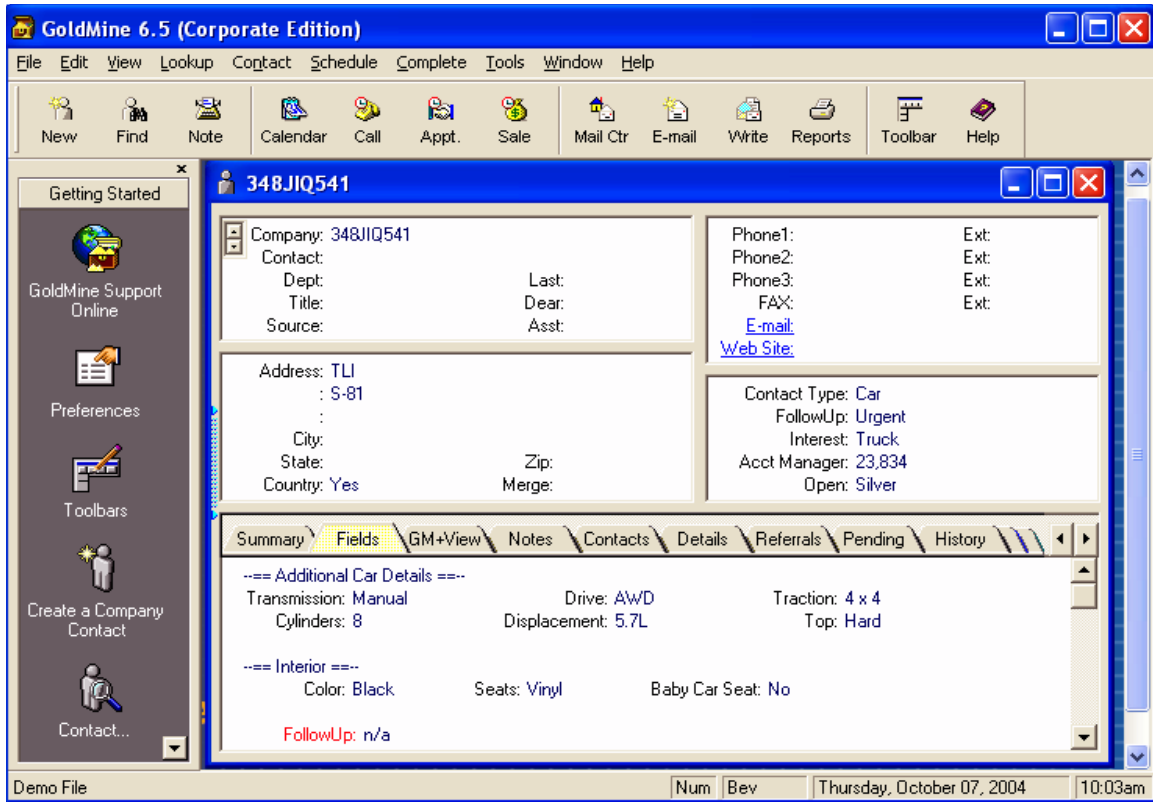
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How GoldMine Works:



Overview:

GoldMine places a full range of features in an easy-to-navigate main window. After you log in, GoldMine's work area appears like:

- Record information about prospects and customers
- Schedule and complete activities
- Send correspondence and literature
- Manage e-mail and more

Tie almost every task to a Contact Record so synchronizing, tracking, and reporting features provide up-to-date information

Contact Management

Contact Records contain typical information such as Company, Address, Phone, Contacts as well as other information that can be defined by the user. Clicking on the *Fields* tab will provide an example of custom fields that might be created by a user.

Tabs in GoldMine

The series of tabs in the lower half of the GoldMine contact window are used to organize more information about the contact. Use the VCR arrows on the right to scroll to see additional tabs. Here is a summary of each tab:

TAB	DESCRIPTION
Summary (CTRL + S)	Displays who created the record and when, the last and next activities, the number of records in the database (only for GoldMine, not GMCE)
Fields (CTRL + F)	Displays user-defined fields
GM+ View (CTRL + V)	Stores custom Web pages or views that can include text, graphics and other rich content
Notes (CTRL + N)	Displays miscellaneous notes entered for the contact along with a date/time stamp
Contacts (CTRL + C)	Displays additional contacts for the company displayed. Number of additional contacts is unlimited.
Details (CTRL + D)	Displays user-definable field information for similar record entries. An example might be a Detail called 'CAR' that would hold information such as make, model, year, colour, etc.
Referrals (CTRL + R)	Designed primarily to track lead referrals but can be used anytime there is an association between two contact records
Pending (CTRL + P)	Displays a list of scheduled activities for the contact
History (CTRL + H)	Displays a list of all completed activities for the contact including email, attachments and mail merges

Links (CTRL + L)	Displays a link to any Windows file (a Word document, Excel spreadsheet, etc.) attached to this contact's record
Members (CTRL + M)	Displays the list of contact groups that this contact is a member of (A contact group might be something like 'all contacts in a certain zip code)
Tracks (CTRL + T)	Displays automated processes or tracks associated to this contact
Oppys (CTRL + Y)	Displays Opportunities associated with this contact
Projects (CTRL + J)	Displays Projects associated with this contact

E-mail

GoldMine's e-mail functionality uses standard POP3/SMTP protocol for the sending and receiving of e-mail messages. Some highlights of the e-mail functionality are:

- Ability to create standard templates, distribution lists, and e-mail rules
- Ability to create e-mail messages in plain text or rich text using HTML
- Choice to send e-mail messages immediately or queue for later delivery
- Choice to have the e-mail server deliver your e-mails on a set interval or hold until you choose to retrieve them
- Ability to link sent or received e-mails to a contact in GoldMine
- Ability to sign e-mail with a digital id or to encrypt the contents
- Ability to spell-check before sending

Can GoldMine perform e-mail blasts?

Yes, e-mail blasts can be accomplished by creating an e-mail template and merging it with all or a group of your contacts. Be aware, however, that many Internet Service Providers will limit the number of e-mails that can be sent from your address in a given period of time. This is usually done to prevent SPAM.

Marketing Automation

GoldMine's Automated Processes automates the workflow processes for repetitive administrative and tracking tasks. The automated process (or track) is a sequence of events; a set of step-by-step instructions that GoldMine evaluates to determine if it should perform specified activities. Each track can have up to 1,000 individual instructions and can therefore, save a great deal of time and effort. Some examples are:

Performing Administrative Tasks

- Each time a new contact is added to the database, an automated process could generate a Welcome letter, then 10 days later send out a brochure of your products, and then schedule a follow-up phone call for a sales person 10 days after the brochure.
- A Thank You letter could be generated any time a sale is completed;
- Perhaps you'd like to send out a Welcome letter when a new contact is added,.

Following up on Contacts

- Schedule follow up calls, e-mails, or letters if there's been no activity for the contact for a set period of time.

Automating Direct Mail Campaigns

- Different mailings can go to different customers, based upon information on the contact record.