



# GOLDMINE PREMIUM EDITION Simple | Affordable | Proven



Choose between  
Own It  
**OR**  
Cloud



A NEW WEB INTERFACE FOR BASIC CONTACT MANAGEMENT AND MOBILE ACCESS AND A FULL WINDOWS CLIENT FOR POWER USERS, ADMINISTRATOR, AND COMPANY FEATURES.

## SIMPLE

All in one CRM for contact management, sales, marketing, and customer service:

- Powerful Windows Client and Mobile access
- Install yourself or use certified consultants for custom needs
- Works with other products you use like MS Office and Constant Contact
- Add-Ons to include specialized functionality
- Free online training videos

## AFFORDABLE

Same product, two deployment choices - **Cloud or Own It:**

### Own it (one-time purchase)

- Lowest cost over over time
- Shared licenses allows all employees access

### Or Choose...

### Cloud Subscription (monthly billing)

- Less infrastructure cost
- Great for start ups and organizations without a server

## PROVEN

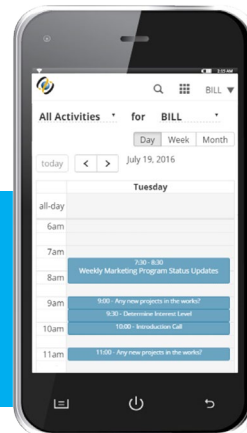
We were pioneers in CRM and have been CRM experts for over 25 years.

- Over 2 million licenses shipped
- In use at small and large companies of all industry types
- Worldwide network of affordable partners to help you set up or customize



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## GoldMine® CRM Key Capabilities

The following capabilities are included in GoldMine Premium Edition.

- Runs on servers you already own for the most affordable option
- Works with Office, SQL server, Outlook, Office 365
- Support for Windows 10, 8, and 7
- Mobile Access from anywhere on smart phones, tablets, PCs and even Apple computers
- Own your license and installation or go with a monthly subscription
- Shared, concurrent users - easy and affordable for everyone to use
- Windows client provides all functionality and the Web client provides an easy way to manage basic CRM functions

### CENTRAL DATABASE

- Shared database to store information about prospects, customers, and third parties
- Eliminate duplicate entries
- Add custom fields
- Use predefined industry templates
- Use security features to manage sensitive information
- Click on any field to get a fast search
- Search capabilities to find what you need
- Filter to create segmented lists

### CONTACT MANAGEMENT

- Schedule calls, appointments, to-dos and tasks
- Complete activities and add notes and reporting codes for tracking
- View pending activities and filter by date or activity
- Link all inbound and outbound emails using GoldMine email client or Outlook
- Document Center to merge contacts in email or Word
- Create and link documents – store locally or in your cloud storage

- Contact information and activities are accessible anywhere with an internet connection
- Search database with keywords
- View Facebook and Twitter and LinkedIn pages for contacts
- Auto link to Google maps, company, and search for info on a contact
- Link contacts from same company together in relationship tree
- Click to dial capability with GoldMine's built in Softphone (SIP compliant)

### FOR SALES & MARKETING

- Use filtering to prepare segmented lists – create groups of contacts for easy access
- Download Constant Contact campaign stats and individual responses to your emails (requires a constant Contact account)
- Import leads from your website
- Assign to sales rep by territory using Automated Processes
- Create simple sales forecasts
- Use Opportunities to manage more complex sales
- Use Campaign Manager to import leads files and assign follow ups
- Literature fulfillment center to ship brochures, samples, catalogs
- Built-in telescripts to train your team

### FOR CUSTOMER SERVICE

- Automate your customer service team with Case Management to track post sale interactions
- Link to contact so there is a record of all interactions that can be seen by sales and support teams
- Assign follow up tasks
- Use dashboard to get reports on cases
- Use included Knowledge Base to find answers to common questions

### FOR MANAGERS

- See your teams scheduled and completed activities
- Track quotas and progress
- Use over 200 included reports for common information
- Use industry standard tools like SQL reporting services or popular add-ons
- Create integrated quotes with industry leading add-on QuoteWerks
- Set security read/write/audit by field and for user groups
- Automated processes for work flow

### ADVANCED FEATURES

- Audit trails of user changes including logging of key field changes
- Integrate to other applications to view customer information from websites and local database applications
- Import and export tools
- Add-on integrations for QuickBooks and Addon software ERP
- Advanced field level synchronization to provide offline access remotely

### FROM THE PUBLISHER

- Annual Support for software updates and technical support by telephone, email, and self-service portal
- Product add-ons for quoting, reporting, finance and more
- Over 250 free training videos
- GoldMine Community to interact with other users and experts
- Fee based training options
- A worldwide network of CRM experts that sell and service GoldMine
- Works with latest version of Windows, iOS and Android