



PC Plus

E-mails handled from within GoldMine are automatically added to a contact's history, and can be reviewed from the contact History tab.



PIM

GOLDMINE 5.0

There's a lot more to GoldMine than simple contact management

Minimum requirements Pentium with 32Mb RAM, Win95/98/2000/NT 4.0 or Terminal Server

Tested on Pentium III 450 with 128Mb RAM, Win98

Other information 5-user version £781 (£665 ex VAT), 10-user version £1,486 (£1,265 ex VAT), 25-user version £3,519 (£2,995 ex VAT)

KnowledgeBase contains files shared across the workgroup; and the PersonalBase is a single user's private store. Between them they can contain anything from procedures and rules, to catalogue pages and sample texts for reading to clients. A third tabbed area, What's New, lists all new entries to the KnowledgeBase in reverse chronological order, making it easy to check for new entries. This in itself is not new, but it has been augmented in version 5.0 by the Literature Fulfillment Centre and the Document Management Centre.

The latter enables you to keep standard documents such as memos, letters, faxes and so on readily to hand, and can even manage pro-forma spreadsheets, e-mail templates and other kinds of document. The beauty of a system like this is that standardisation is easy to achieve, and organisation-wide changes to documents only need to be made once for everyone to have access to them. The Literature Fulfillment Centre enables sales staff to assign the sending out of literature to other staff, and to schedule this activity for a set date.

For those who need to work on the road, GoldMine includes conduits to synchronise with hand-helds running the Palm OS and WinCE and, if you prefer to use Outlook 98 or 2000 for some parts of your work, then GoldMine can share data with that as well.

There is a lot more to GoldMine than simple contact management. It is a fully-fledged sales force automation tool. It is extremely sophisticated but we do have to note that the documentation is not all it could be. The one 'at-a-glance' manual which comes with the software introduces its key features, but these are all relatively low level, and you are left to your own devices or the on-line help if you want to delve deeper.

Sandra Vogel

GoldMine is a top-of-the-range sales force automation application designed to improve the efficiency of small and medium-sized enterprises as well as large corporations.

We last looked at GoldMine as part of a group test of Personal Information Managers in *PC Plus* 155. At that time it won our Performance Award beating, among others, its close rivals in terms of features and functionality, Maximizer and ACT! Since then, it has gone through a revision and is now at version 5.0.

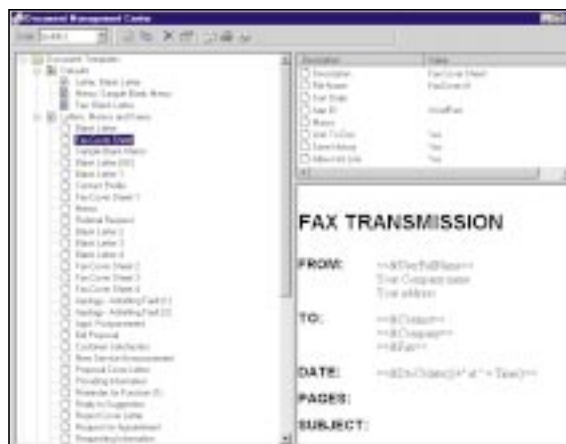
The overall look and feel of the software has changed little. One of the things we like about GoldMine is the way it puts a lot of information at your fingertips and we are glad to see that the user-friendly interface hasn't been toyed with. Contact information is presented in a window, the bottom third of which contains tabbed boxes. Many are pre-configured and contain information such as individuals associated with the primary contact (for example, secretary or assistant), activities due to be completed relating to the current contact and activities already completed relating to this contact. You can add your own tabs, either as an individual user or as a network supervisor, allowing for customisation of the software. Another neat feature is the Org Chart view. This can list an organisation department by department, opening up like Windows Explorer to show how individuals relate to each other within a company.

Events relating to specific contacts are easily scheduled. GoldMine has its own calendar module and anyone using GoldMine in a group situation can check on other people's diary commitments as well as their own. While GoldMine pays good attention to detail as far as activity monitoring and scheduling is concerned, it is the added features that help it stand out from the crowd. These come into their own when the software is used for group working.

One of the most basic of these is GoldMine's ability to automatically schedule activities. You can tell it, for example, to automatically produce a welcome letter for any new contact entered into the database; to trawl every contact for unpaid invoices and take appropriate action; or to automatically set up a follow up call if printed information is dispatched. These kind of things can save lots of time.

Workgroup members increasingly need access to e-mail and to share information they send and receive. GoldMine version 4.0 had an E-mail Centre, now this is accessible from the main toolbar. Once in the E-mail Centre, it is possible to create and send both workgroup and external e-mails. New to this edition is the ability to configure rules to store, forward, sort and organise e-mails according to conditions you set. E-mails are automatically logged as part of a contact's history. If you click on an e-mail as listed in a client's history list, the e-mail itself is called up for review.

GoldMine 5.0 builds on the InfoCentre feature. We have always been impressed with this, and the way it functions as a centralised store of documents and other media such as graphics. It contains two sets of files accessible by tabs: The



Use the Document Management Centre to store template documents.

PC Plus

VERDICT

GOLDMINE 5.0

For Very well featured, uncomplicated to use
Against Documentation could be fuller

Range of features.....9
Ease of Use.....9
Documentation.....7
Performance.....8
Value for money.....9

9/10