

What's New in GoldMine v6.0

Initial Setup

- **New Quick Start Wizard:** To simplify setting up Goldmine's appearance, features and operation.
- **Initialization file setting:** To add your organization's logo or other bitmap image to Goldmine's login window.
- **New initialization file setting:** To maintain the existing BDE sharemem location.
- **New Preference option:** To display dates in the format used in your local area.
- **New Preferences option:** To select the format for user defined dates.

Configuration

- **User Drop Downs:** The order of the expanded user identification showing user name and individuals' full names in Goldmine windows and dialog boxes.
- **Spell Checking:** Customizable spell checking supporting twelve languages including English, French, Spanish, Italian and German.

Contact Record

- **Field Properties-** The dialog box now organizes Contact Record field settings into tab folders for easy customization.
- **E-Mail and Web Site:** Field labels now provide one-click access to the corresponding dialog boxes or operations.
- **GM+View:** New tab in the contact record provides rich content displays of HTML text and graphics. Master right users can create custom templates to control the display in the GM + View tab.

Record Searches

- **Additional Lookup Capabilities:** The new lookup menu item enables users to search for records by e-mail address or additional contact entry.
- **Contact Search Center: (Replacing the contact listing)** Now provides a central location for searching records by a variety of powerful methods. Use Goldmine's built-in-search features to quickly find contacts or to create a filter on the fly to search for records meeting specific criteria.

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Calendar

- **Layout:** Redesigned for easier access to common task.
- **Holidays:** Predefined sets for various countries and religions.
- **Occasions:** Track special contact related events such as birthdays, anniversaries or other special occasions.

Activities

- **Activity List:** New tabs to view holidays and occasions.
- **Schedule Window:** Redesigned, organizing options in a clear, user friendly layout.
- **Scheduling:** Ability to schedule to multiple contacts and/or users.
- **HTLM:** Supported in the notes section of the activity, extending the formatting capabilities.
- **Spell Check:** Now available in the notes section of the activities.
- **Meeting Requests:** Distribution of meeting requests to other Goldmine users via GM e-mail.
- **Recurring Activities:** Enhanced options to schedule recurring activities in the new Advanced Recurring dialog box.
- **Group Scheduling:** Tab updated to more clearly identify the options available in the tab.
- **Auto-Update:** New feature that can complete or delete multiple activities in one operation.
- **iCalendar:** New capabilities to import and export activities.

Sales and Opportunities

- **Opportunity/Project Manager:** Expanded to provide more capabilities, yet easier than ever to use. New features include a wizard to create opportunities and projects, special toolbar to run commonly used commands.
- **Pipeline Funnel:** Now appears in its own window and can be output to a HTML file. The pipeline provides an overview of both opportunities and forecast sales.
- **Quota Dialog Box:** New organization and access to setting formerly available in the Quota Profile dialog box into tab folders for easier management of the quota assignments.
- **Forecasted Sales:** Schedule dialog box organizes new and previously available settings in a tab folder for easier management of sales- related information.

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Communications

- **Zetafax:** New support in the Goldmine Link to Word for Zetafax.
- **Installer:** More informational installer for the Goldmine Link to Word confirming each successfully finished step of the installation.
- **Main Menu:** Convenient alternate commands to access your documents and e-mail templates.
- **Document Management Center:** New capability to add subfolders for your templates.
- **Administrative Controls:** Capability for administrators to specify the destination and file name format of templates, merged documents, and linked documents saved by each Goldmine user.
- **Mail Center:** customize your auto-filing folders in the e-mail center.
- **Previewing Messages:** Setting to change the maximum amount of message text the E-mail Center can preview in messages waiting on your e-mail sever.
- **Web Imports:** Enhancements for setting up data retrieval form the company's web site.

Information Resources

- **My Goldmine:** Provides a personalized resource you can use to view Goldmine and Internet site information in one easy-to-view window.
- **Process Monitor:** Enhancement adds color to task status messages.
- **Easily identify errors and warnings.**
- **About Goldmine:** Enhanced dialog box provides new categories of information about your installation and FrontRange Solutions Inc.

Data Management

- **Export Wizard:** New options to include primary and/or additional contacts in the export files, as well as applying merge codes as criteria for record selection.
- **XML Import Wizard:** Import contact-related data and linked activities from XML format files.
- **XML Export Wizard:** Export Goldmine data s XML file, enabling data transfer to contacts who do not use Goldmine.
- **Back-Up Wizard:** Back up you Goldmine data.
- **Restore Wizard:** Restore Goldmine data backed up by the Backup Databases Wizard.

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Synchronization

- **Settings:** New window that centralizes settings for Goldmine and GoldSync.
- **Connection Methods:** Now focus on Internet connection methods such as by direct Internet connection and via internet e-mail. Other methods such as modem and network are no longer available.
- **Date and Time stamps:** More convenient method for GoldSync administrators to convert encrypted SyncStamp, LogStamp and RecID values to date and time stamps.
- **PDA and Outlook Sync:** New options to limit data selection to either contact data or activities when synchronizing to Microsoft Outlook, Palm/Visor or other Palm OS device or your Pocket PC.

Additional Enhancements

- **License Types:** New license types to enable administrators to increase an existing Goldmine or GoldSync license and better track “inventory” of licenses.
- **Main Menu:** Changes to launch new features and simplify access to some existing features.
- **HTML:** Capabilities that can be used to enhance text and graphics in your e-mail, activities, InfoCenter, Alerts, and other records.
- **Automated Process:** New option to designate the sender of e-mail in Automated Process.