

MapView

Local Account Management

Geographic Marketing

**Put GoldMine on
the Map!**
Geographic Analysis & Tools



Why MapView?



- **Geography makes a difference in effective sales and marketing planning**
- **Geographic territory insight can dramatically increase sales productivity**
- **Geographic insight can improve the ability of sales management to understand sales territory coverage**
- **Geographic prospect targeting can increase marketing effectiveness and reduce marketing costs**
- **Geography needs specialized tools as this information is not easy to include in standard report type analysis**

Selling Power Article



Selling Power - February 2007 Issue



Feature Article

Advanced CRM: How Companies are pushing the envelope to help sales reps work more effectively.

MapView and GoldMine Customer 'First American Equipment Leasing' describes how they utilize MapView and GoldMine to provide sales people with superior territory information.

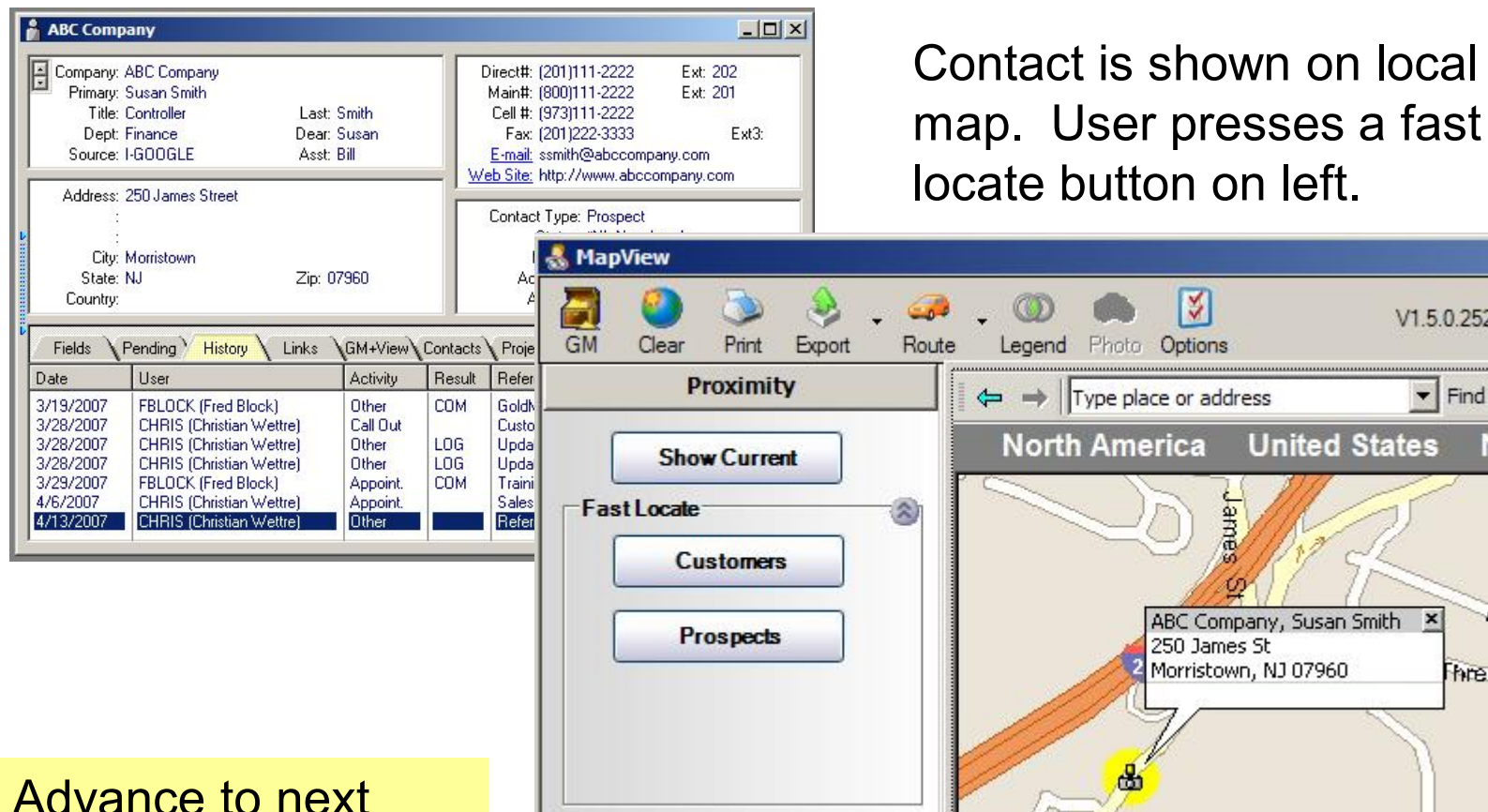
Download Article:

<http://www.w-systems.com/download/DTMSellingPowerMagazine.pdf>

Contact Proximity Search

From a contact viewed in GoldMine, MapView users can instantly show other contacts such as customers, prospects and more in closest proximity to contact.

Contact is shown on local map. User presses a fast locate button on left.



The screenshot displays the GoldMine contact record for ABC Company and the MapView interface. The contact details include:

- Company: ABC Company
- Primary: Susan Smith
- Title: Controller
- Dept: Finance
- Source: I-GOOGLE
- Last: Smith
- Dear: Susan
- Asst: Bill
- Direct#: (201)111-2222
- Main#: (800)111-2222
- Cell #: (973)111-2222
- Fax: (201)222-3333
- Ext: 202, 201, 3
- E-mail: ssmith@abccompany.com
- Web Site: http://www.abccompany.com
- Address: 250 James Street
- City: Morristown
- State: NJ
- Zip: 07960
- Contact Type: Prospect

The MapView interface shows a 'Proximity' search panel with the following options:

- Show Current
- Fast Locate
 - Customers
 - Prospects

The map displays the location of ABC Company, Susan Smith at 250 James St, Morristown, NJ 07960. A tooltip shows the contact details.

Date	User	Activity	Result	Refer
3/19/2007	FBLOCK (Fred Block)	Other	COM	GoldM
3/28/2007	CHRIS (Christian Wettre)	Call Out	COM	Custo
3/28/2007	CHRIS (Christian Wettre)	Other	LOG	Upda
3/28/2007	CHRIS (Christian Wettre)	Other	LOG	Upda
3/29/2007	FBLOCK (Fred Block)	Appoint.	COM	Traini
4/6/2007	CHRIS (Christian Wettre)	Appoint.	COM	Sales
4/13/2007	CHRIS (Christian Wettre)	Other	COM	Refer

Advance to next slide for result

Local Account Management



MapView V1.5.0.27200

GM Clear Print Export Route Legend Photo Options

Type place or address Find Road Map

North America United States New Jersey Cities-

0 mi 1 2

Microsoft MapPoint

Proximity

Show Current

Fast Locate

Customers

Prospects (more)

Marketing

Filter Locate

Contact Type (All)

Status (All)

Acct Mgr (All)

Locate

Other Resources

Hotels and Motels

Locate

Calendar

Activity

Sales

Groups

#5 5.5 miles
Champion Mortgage
Jennifer Roushinko
2 Gatehall Drive
Parsippany, NJ 07876
(973)402-7700

#2 2.3 miles
Always In Motion, LLC
Patricia Walsh
9 Colonial Road
Morristown, NJ 07960
(973)241-7314

#1 1.5 miles
Unison Health Plan of NJ
Stephan Yelenik
55 Madison Avenue
Morristown, NJ 07960
(908)313-5573

ABC Company, Susan Smith
250 James St
Morristown, NJ 07960

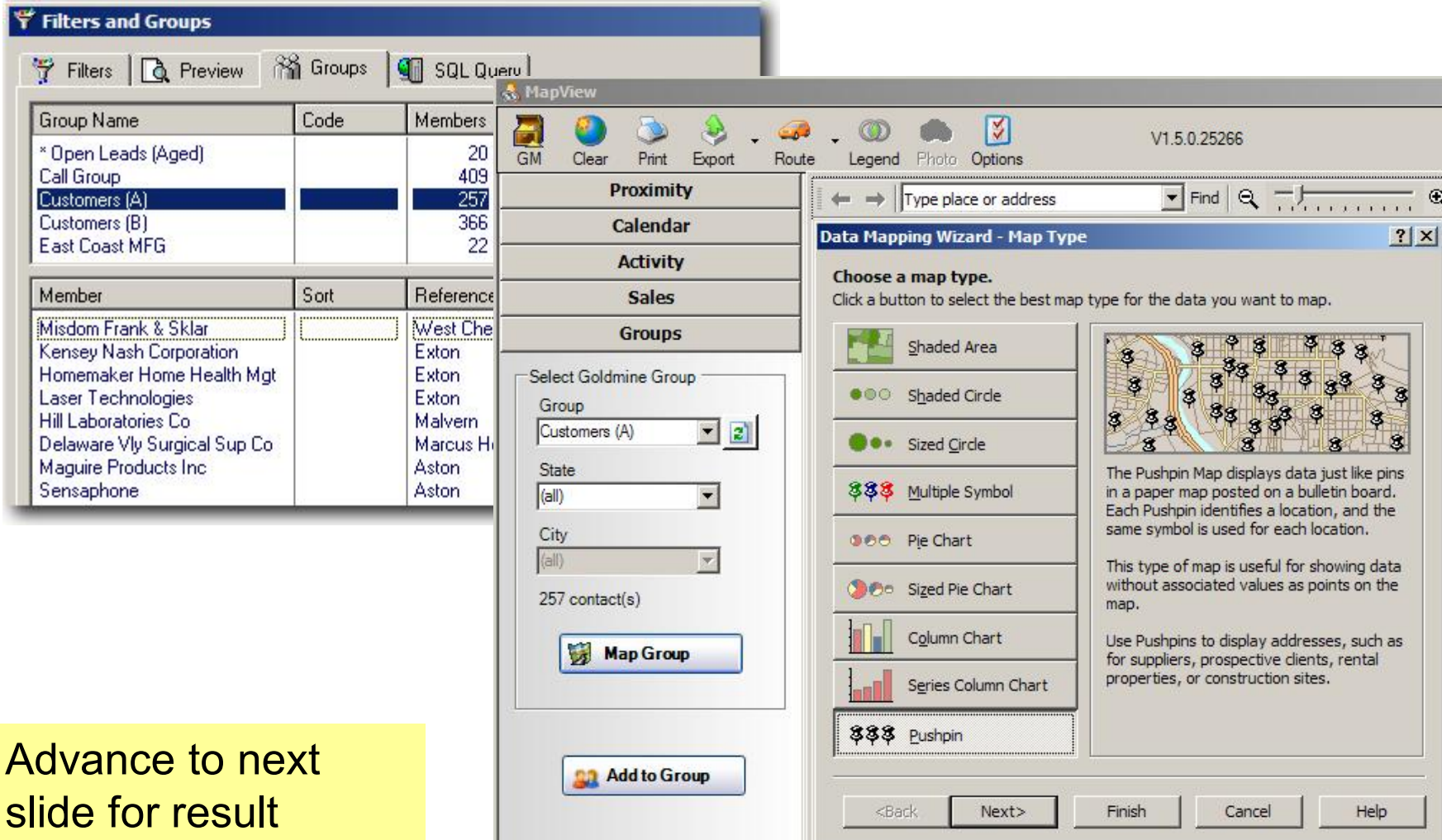
#4 4.8 miles
GPS Industires
Lee Jewell
4 Knapp Avenue
Florham Park, NJ 07932
(973)660-0773

#3 2.9 miles
Accenture
Cheryl Railey
100 Campus Drive
Florham Park, NJ 07901
(973)301-1299

Map Data

Map GoldMine Contact Groups

GoldMine maintains contact groups. MapView can show the contacts in these groups in pushpin or analytical shade maps.



The screenshot displays the GoldMine software interface. On the left, the 'Filters and Groups' window shows a table of contact groups. The 'Customers (A)' group is selected, containing 257 members. Below the table, a list of member names and their locations is visible.

Group Name	Code	Members
* Open Leads (Aged)		20
Call Group		409
Customers (A)		257
Customers (B)		366
East Coast MFG		22

Member	Sort	Reference
Misdom Frank & Sklar		West Che
Kensey Nash Corporation		Exton
Homemaker Home Health Mgt		Exton
Laser Technologies		Exton
Hill Laboratories Co		Malvern
Delaware Vly Surgical Sup Co		Marcus H
Maguire Products Inc		Aston
Sensaphone		Aston

The 'MapView' window is open, showing a toolbar with options like GM, Clear, Print, Export, Route, Legend, Photo, and Options. A sidebar on the left lists categories: Proximity, Calendar, Activity, Sales, and Groups. Below this, a 'Select Goldmine Group' section has dropdown menus for Group (Customers (A)), State (all), and City (all). It indicates '257 contact(s)' and has a 'Map Group' button.

The 'Data Mapping Wizard - Map Type' dialog box is open, prompting the user to 'Choose a map type.' It lists several options: Shaded Area, Shaded Circle, Sized Circle, Multiple Symbol, Pie Chart, Sized Pie Chart, Column Chart, Series Column Chart, and Pushpin. The 'Pushpin' option is selected. A preview map shows a grid with pushpin symbols. Text on the right explains that pushpin maps display data as pins on a map, useful for showing addresses like suppliers or rental properties. Navigation buttons at the bottom include <Back, Next>, Finish, Cancel, and Help.

Advance to next slide for result

Map Contact Groups



MapView V1.5.0.27200

GM Clear Print Export Route Legend Photo Options

← → Type place or address Find [Map Tools] Road Map

North America United States States- Cities- 0 mi 5 10 15

Proximity
Calendar
Activity
Sales
Groups

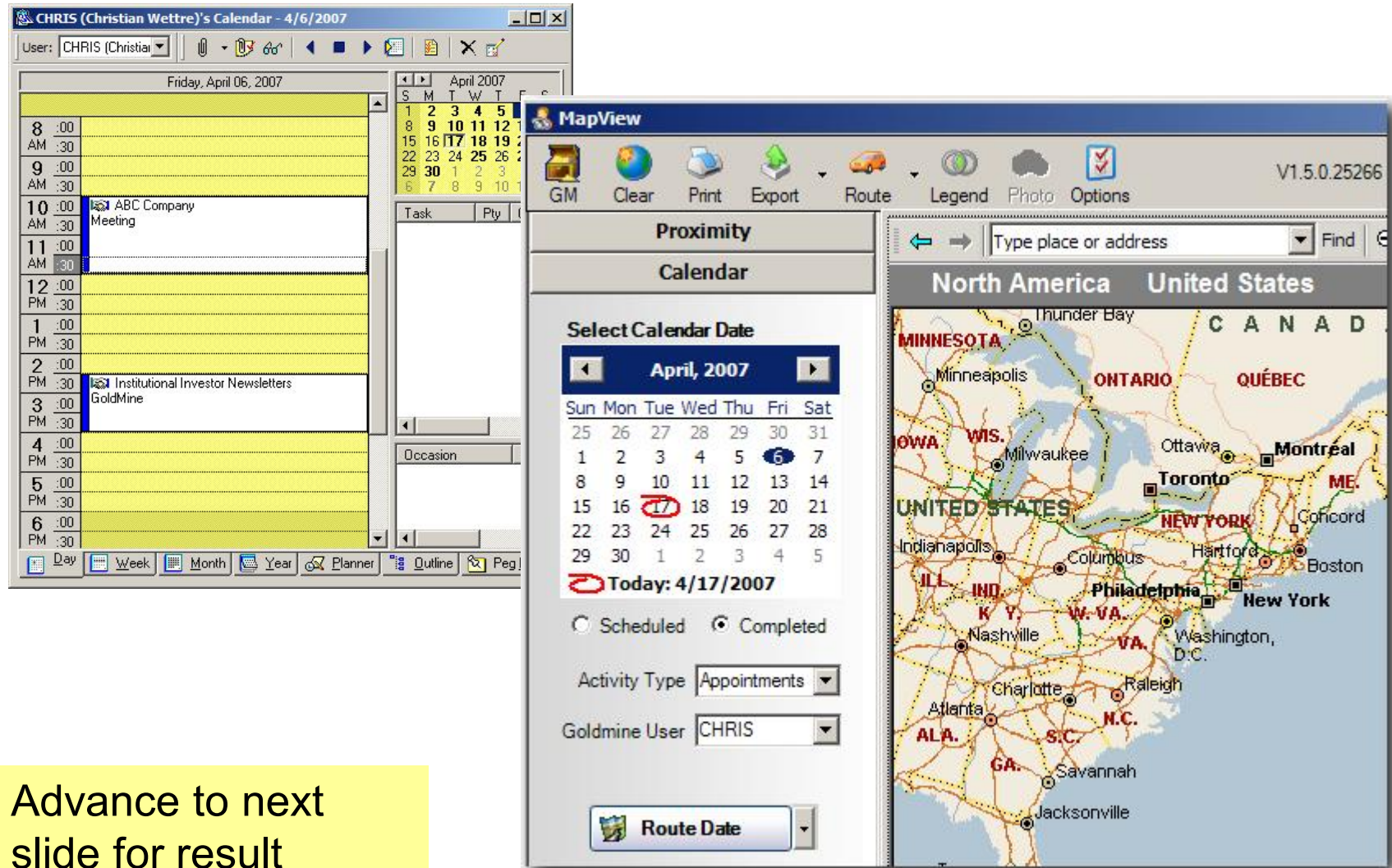
Select Goldmine Group
Group: Customers (A)
State: (all)
City: (all)
257 contact(s)
Map Group
Add to Group

Medcomp
Address: 1499 Delp Dr
City: Harleysville
State: PA
ZIP: 19438-2936
Contact: David Markel

Territory
Map Data

Route GoldMine Calendar

Users maintain calendars in GoldMine. MapView can provide turn by turn directions and route maps for the entire calendar day.



The screenshot displays the GoldMine software interface. On the left, a calendar window titled "CHRIS (Christian Wettre)'s Calendar - 4/6/2007" shows a daily view for Friday, April 06, 2007. The calendar grid shows appointments at 10:00 AM and 3:00 PM. The 10:00 AM appointment is titled "ABC Company Meeting" and the 3:00 PM appointment is titled "Institutional Investor Newsletters GoldMine".

On the right, the "MapView" application is open, showing a map of North America. The interface includes a search bar with the text "Type place or address" and a "Find" button. Below the search bar, there are tabs for "Proximity" and "Calendar". The "Calendar" tab is active, displaying a calendar for April 2007. The date "Today: 4/17/2007" is highlighted. The calendar grid shows the date 17th of April circled in red. Below the calendar, there are radio buttons for "Scheduled" and "Completed", a dropdown menu for "Activity Type" set to "Appointments", and a dropdown menu for "Goldmine User" set to "CHRIS". A "Route Date" button is also visible.

At the bottom left, a yellow box contains the text: "Advance to next slide for result".

Route GoldMine Calendar



MapView V1.5.0.25266

GM Clear Print Export Route Legend Photo Options

Type place or address Find [Map Tools] Road Map

Time	Mile	Instruction	For	Toward
9:26 AM	3.3	Keep LEFT to stay on Ramp	43 yds	US-202 / Morristown
9:26 AM	3.4	Bear LEFT (West) onto US-202 [Ramapo Valley Rd]	6.8 mi	
9:34 AM	10.2	Take Ramp (RIGHT) onto I-287	24.9 mi	I-287
9:57 AM	35.1	At exit 33, turn RIGHT onto Ramp	0.1 mi	Harter Rd
9:57 AM	35.2	Keep RIGHT to stay on Ramp	120 yds	Harter Rd / James St
9:58 AM	35.3	Turn RIGHT (South) onto Harter Rd	0.3 mi	
9:59 AM	35.7	Turn LEFT (North) onto CR-663 [James St]	0.4 mi	
10:00 AM	36.0	2 Arrive ABC Company		
12:00 PM	36.0	Depart ABC Company on CR-663 [James St] (Nor 0.2 mi		
12:01 PM	36.2	Turn RIGHT (South-East) onto Southgate Pky	0.2 mi	

North America United States New Jersey

0 mi 5 10 15 20

Activity Type: Appointments
Goldmine User: CHRIS
Route Date: [Dropdown]

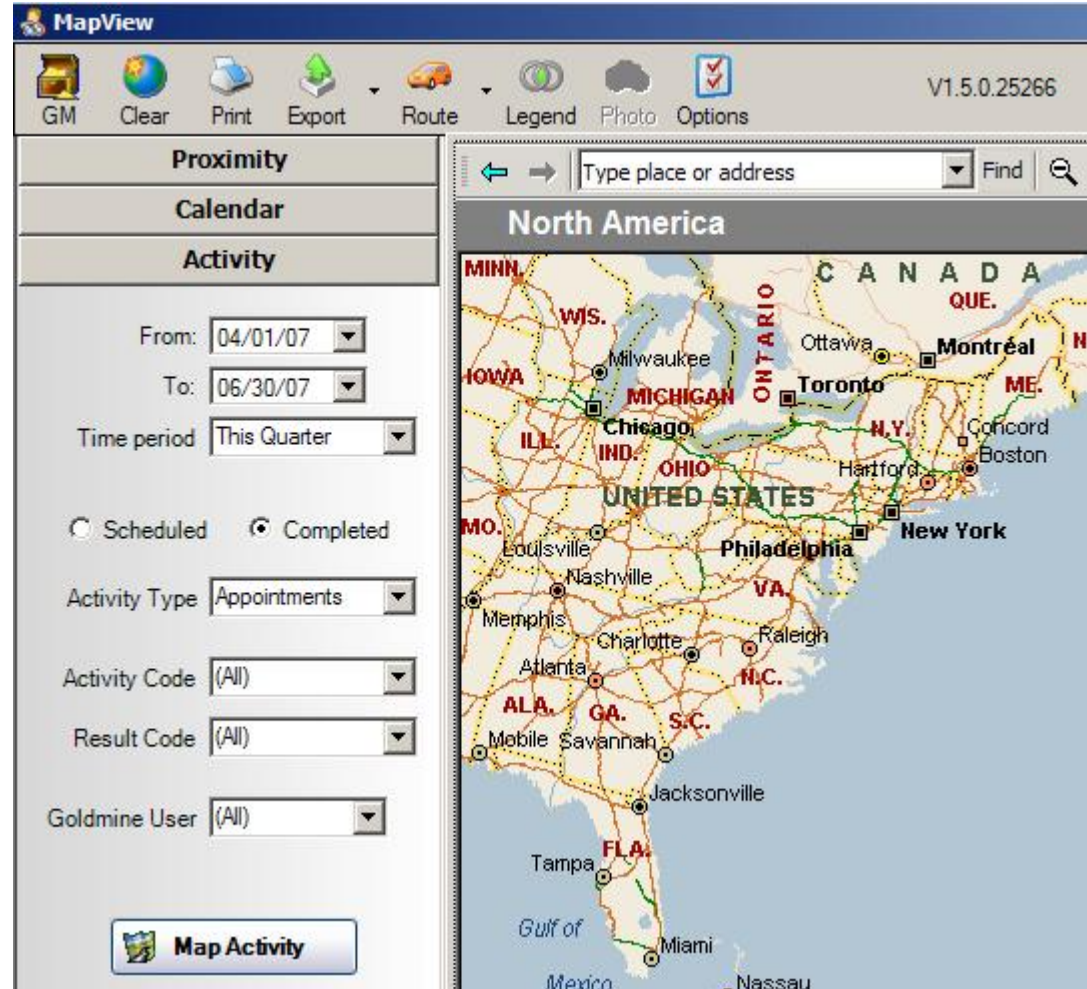
Activity: Sales, Groups, Territory

Map Data

Map Completed Activity

MapView can show exactly where appointments, calls, emails and any completed action in GoldMine took place.

Date	User	Activity
8/28/2006	CHRIS (Christian Wettre)	Call In
8/28/2006	CHRIS (Christian Wettre)	Call In
11/30/2006	CHRIS (Christian Wettre)	Call Out
3/14/2007	FBLOCK (Fred Block)	Call Back
3/19/2007	FBLOCK (Fred Block)	Other
3/28/2007	CHRIS (Christian Wettre)	Call Out
3/29/2007	FBLOCK (Fred Block)	Appoint.



The screenshot shows the MapView application interface. The top menu bar includes GM, Clear, Print, Export, Route, Legend, Photo, and Options. The version number V1.5.0.25266 is displayed in the top right. The main interface is divided into several sections:

- Proximity**: A section for location-based filtering.
- Calendar**: A section for time-based filtering.
- Activity**: A section for activity type and code filtering.

The filters are set as follows:

- From: 04/01/07
- To: 06/30/07
- Time period: This Quarter
- Scheduled: Completed:
- Activity Type: Appointments
- Activity Code: (All)
- Result Code: (All)
- Goldmine User: (All)

A search bar at the top right of the map area contains the text "Type place or address" and a "Find" button. The map itself shows North America with various cities and states labeled, including Milwaukee, Chicago, Toronto, Montreal, New York, Philadelphia, Nashville, Memphis, Atlanta, Charlotte, Raleigh, Jacksonville, Tampa, and Miami. The Gulf of Mexico and Nassau are also visible.

At the bottom of the interface, there is a "Map Activity" button.

Advance to next slide for result

Map Completed Activity



MapView V1.5.0.25266

GM Clear Print Export Route Legend Photo Options

Proximity
Calendar
Activity

From: 04/01/07
To: 06/30/07
Time period: This Quarter

Scheduled Completed

Activity Type: Appointments
Activity Code: (All)
Result Code: (All)
Goldmine User: (All)

Map Activity

Sales
Groups
Territory

North America United States New Jersey

Type place or address Find Road and Data Map

0 mi 20 40 60

Draw \$ [drawing tools]

Map Data

Map Forecasted / Completed Sales



MapView can show which regions are delivering a sales pipeline and where completed sales are coming from.

Close Date	%Prb	Forecast	Code	Product
4/17/2007	40	19,800	FRS	GMSM
4/17/2007	60	3,555	WSS	MapView
4/17/2007	60	5,300	WSS	
4/17/2007	60	50,000	SVS	
4/17/2007	90	3,809	QTE	
4/17/2007	80	5,950	FRS	
4/17/2007	80	2,065	WSS	
4/17/2007	80	12,000	SVS	
4/17/2007	90	2,872	QTE	
4/17/2007	60	5,355	FRS	
4/17/2007	60	4,694	QTE	

Sales

Forecasted
 Completed

Goldmine User
 (All)

Product
 (All)

Code
 (All)

Probability Greater than
 (All)

Date
 This Month

Map Sales

Data Mapping Wizard - Map Type

Choose a map type.
 Click a button to select the best map type for the data you want to map.

Shaded Area
 Shaded Circle
 Sized Circle
 Multiple Symbol
 Pie Chart
 Sized Pie Chart
 Column Chart
 Series Column Chart
 Pushpin

The Sized Circle Map displays data as circles of varying size. The size of each circle corresponds to its value-the higher the value, the larger the circle.

This type of map is useful for presenting information about a particular location, such as a city or an address. It's also useful for representing a second set of data on a Shaded Area Map.

Use sized circles to display data such as the number of customers by city or sales revenue by store.

Advance to next slide for result

Map Completed Activity



MapView V1.5.0.25266

GM Clear Print Export Route Legend Photo Options

Proximity
Calendar
Activity
Sales

Forecasted
Completed

Goldmine User: (All)
Product: (All)
Code: (All)
Probability Greater than: (All)
Date: This Month

Map Sales

North America United States New Jersey

Type place or address Find Road and Data Map

Groups
Territory

Map Data

MapView Licensing & Pricing



- MapView is based one client license per named user.
- MapView requires a running licensed GoldMine instance to operate.
- wMobile starts at \$395 per named user license with volume license pricing based on quantity
- Annual Maintenance is optional at 20% of software and includes annual software updated and telephone technical support

® GoldMine is a registered trademark of FrontRange Solutions Inc.