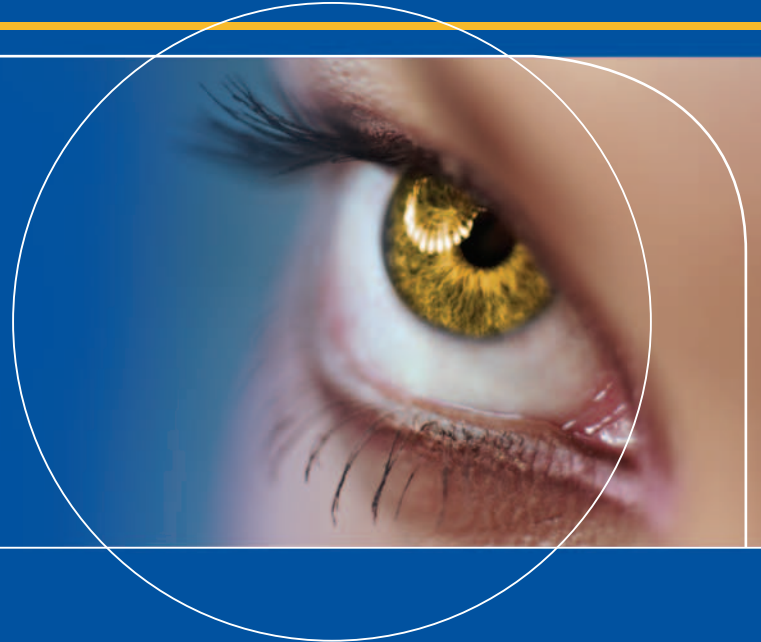


CRM that makes a difference...

Gold-Vision is a powerful Customer Relationship Management application that builds on your existing investment and processes.



CRM
For Outlook®

- ▶ Account & Contact Management
- ▶ Sales & Quotations
- ▶ Marketing & Campaigns
- ▶ Customer Service & Support
- ▶ Project & Event Management

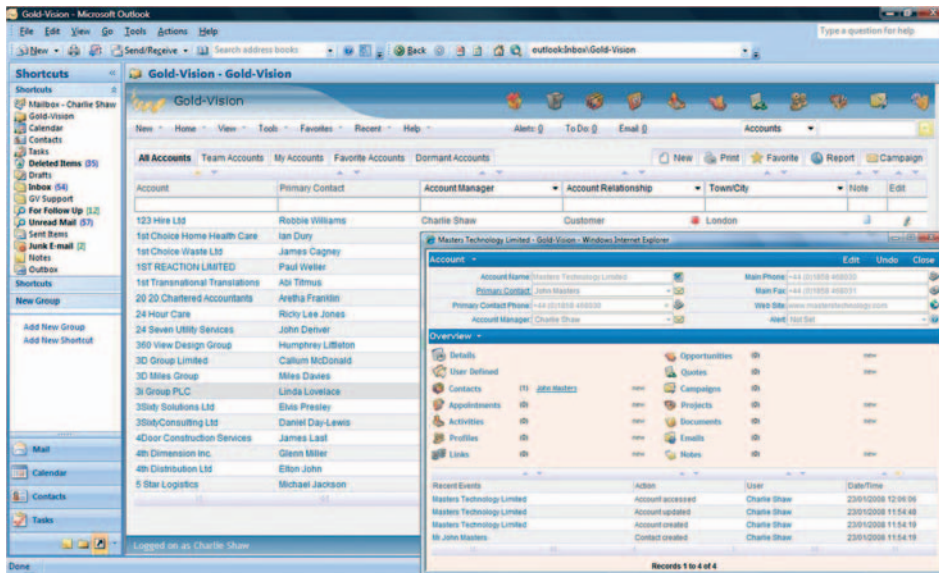
Benefits to you

- **Work as a team** – see a unified view of each customer accessible across your organisation.
- **Understand what's going on** – Gold-Vision includes unique technology that automatically assigns outgoing and incoming emails to the right account and contact record. These can be further linked to specific opportunities, projects, etc.
- **Maximise sales conversion** - get a clear vision of your pipeline and where to focus effort for greatest reward.
- **Improve your decision making** – make decisions on opportunities and projects with the confidence that you know the latest facts.
- **Understand your customers** – have valuable information at your fingertips enabling you to respond quickly to customer opportunities and issues.
- **Improve your marketing focus** and generate smarter campaigns using Gold-Vision templates. Understand where your business actually comes from, and therefore where to invest.
- **Easy but powerful reporting** – turn data into understanding using integrated Microsoft SQL Reporting Services® in Gold-Vision, or through direct links with Excel®.
- **Integrate business processes** – sales, support, service and marketing teams can all use Gold-Vision. Your customers will notice how informed your team has become!
- **Maximise your existing Microsoft® investment** – build on familiar Microsoft® Outlook® functionality and make users feel at ease with CRM. Or use the mobile version with your Blackberry®, Windows Mobile or Palm device.
- **Integrate with other systems** to avoid duplication of input and streamline processes. Gold-Vision has been integrated with several accounting or business solutions.

Account & Contact Management

- Centralise your Account and Contact information in a relational database integrated with Microsoft Outlook®.
- Complete Customer View - Gold-Vision tracks all communication and activities with customers and prospects. The Gold-Vision account overview screen provides a snapshot of current events, opportunities, emails, phone calls, appointments, documents, notes, projects and tasks.
- Event tracking - Get up to speed quickly – see Recent Events by account for real insight!
- Manage complex relationships with powerful but simple links. Naturally, linked contacts, or opportunities are easy to see.
- Business alerts - Assign alerts by account, opportunity or project or create automated e-mail alerts.
- Activity management - Drill-down to activities by account, contact, opportunity, campaign or project.
- Profile management - Maintain unlimited profiles against each account and contact. To make analysis easier, categorise the profiles; e.g. interest groups, networks, product interests.

- Data management - find your important emails, attachments, documents, notes quickly and easily with powerful searching functionality. Reduce the “copy everyone” mentality.



"Gold-Vision has provided the complete one stop solution that we were looking for. We have more global visibility and utilise the centralised contact data across departments."

Customer Service & Support

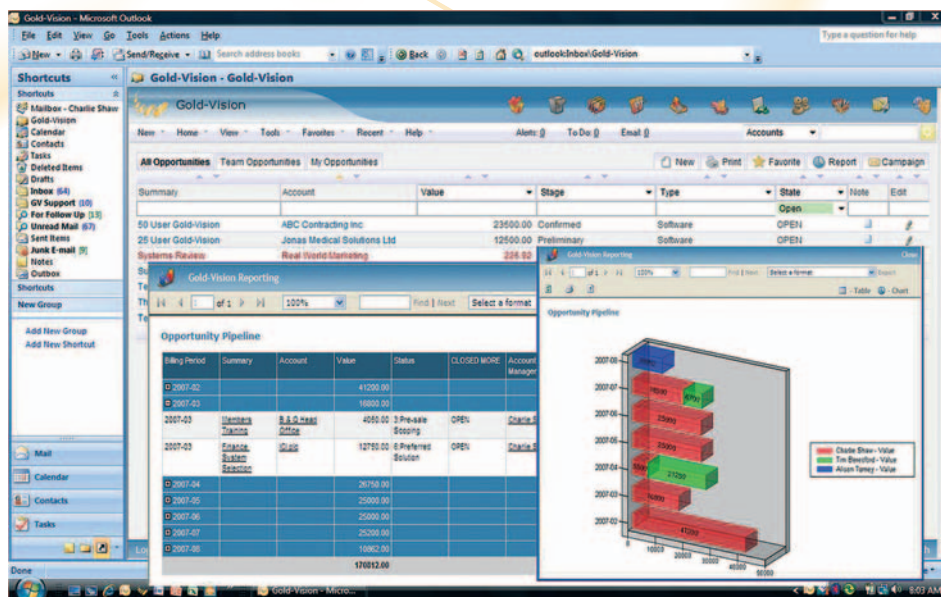
- Integrate sales and service teams with a unified view of all customer information – your team can see first-hand the customer service, correspondence and activity history.
- Respond quickly to customer queries, requests and issues. Account notes providing important information can be "broadcast" with a single click via email to relevant account team members - ideal for improving service.
- Assign automated ticket numbers for helpdesk activities and customer requests. The ticket number may be automatically included on template emails or documents to the customer. Integrate Gold-Vision with your customer portal.
- Ensure that your customer service meets or exceeds your standards. Create automated functions to generate escalation actions or exception alerts.
- Knowledge Management – help your customer service staff keep all sales, service or product documents to hand where you expect it. Any note text, email text, email attachment or document link may be quickly searched. Alternatively, link documents from SharePoint® or other corporate solutions.
- Generate powerful reports on customer service activities using the embedded SQL Reporting Services® tools. Set schedules for automatically emailing reports to recipients.



Sales & Quotations

- Maximise lead conversion - track leads through the sales cycle and plan resources effectively. Gold-Vision provides the tools for your sales team to quickly identify and prioritise hot prospects whilst ensuring that sales activities are not being missed.
- Create professional Quotes and Proposals using the fully integrated product list and multi-currency quotes with direct output to Word® templates. Quote calculations can be easily edited and sales opportunity values are automatically updated.
- Fast customer or prospect response - send out standard letters, literature or quotes using template documents, product files and price lists.
- Opportunity owners can be assigned and you can automate your sales process based on defined criteria. Use the optional broadcast tools to alert team members fast!
- Sophisticated but simple sales opportunity recording. Just enter estimates to begin with then refine using quotes. Opportunity stages are fully definable, adding workflow benefits to your process.
- Generate accurate sales forecasts. Understand where your business for next week or month is coming from using the powerful Gold-Vision reporting capability. Differentiate between order and revenue pipeline.

- Integrate your quote process with external systems – import quotes into Gold-Vision or export Gold-Vision quotes into sales order processing systems.



"Gold-Vision has given us far, far better control over our sales activities, contributing to our target to increase profitability - ultimately that is the aim."

Marketing & Campaigns

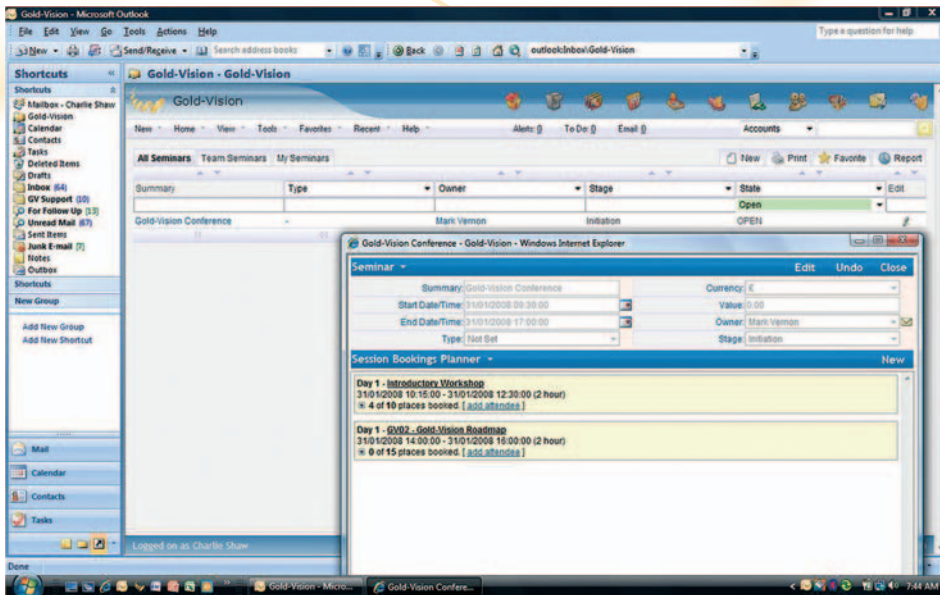
- Optimise your Marketing processes. Use Gold-Vision to generate effective campaigns and measure the success of marketing activities to focus strategy.
- Create a new bulk mail, email, fax or telephone campaign from system-wide searches and list filtering using unlimited sources and campaign templates. Gold-Vision deals efficiently with simple mail merges through to more sophisticated multi-run campaigns. As part of the campaign set up, activities may be automatically created in the relevant account for follow up.
- Target prospects for new business and existing customers for repeat or related business using comprehensive Gold-Vision product sales analysis.
- Work as a team using a single database. Allow those users with the relationship to manage a campaign live, record activity updates and share progress reviews between team members.
- Improve data quality and avoid fines. Gold-Vision campaigns respect receipt preferences pre-set at the contact level. Campaigns will also identify poor data e.g. incomplete addresses.



- Follow-up marketing events quickly using the Gold-Vision Database Manager for easy and reliable contact list importing.

Project & Event Management

- Create and track projects to manage focused internal or customer activity. Set your own project stages and design the fields to record the information important to your teams.
- Projects may be auto-numbered for ease of identification. Mail-tracking may be configured to automatically link related emails to the relevant project, reducing manual effort and increasing knowledge.
- Allocate specific project teams made up of your own colleagues, or contacts from any account – especially useful when dealing with consultants or 3rd parties. Use the membership groups to send out project or event correspondence.
- Gold-Vision incorporates powerful event or course booking functionality normally only found in specialist applications. Create events with multiple sessions and manage the delegate booking process, and communications within a CRM environment.
- Generate automated activity workflows for particular project or activity types. Include key milestone dates for activities, with powerful alerting – synchronise to your Outlook® tasks.
- Generate powerful Project or Event activity reports using the embedded SQL Reporting Services® tools. Set schedules for automatically emailing reports to recipients.



"The Gold-Vision team was very competent, exceedingly well organized and the implementation went as smoothly as we could have hoped."

Gold-Vision Mobile

- Your customers expect you to know what is going on – almost up to the minute. Empower your mobile team with the current information that they need to service your prospects and customers better than your competitors.
- Gold-Vision Mobile provides a simple interface to your live Gold-Vision data. It may be accessed by almost all PDA, Blackberry®, Palm®, Windows Mobile® or Smartphone devices.
- Gold-Vision uses or synchronises with your Outlook® data, so you have access to key data on-line or off-line.
- There's a mobile email revolution going on. Emails sent from your mobile devices with Microsoft Exchange® integration will track as normal into your Gold-Vision. No need to go home and synchronise. Compare this with other CRM solutions.
- Changes made to the core application are automatically and immediately reflected in the mobile solution – or you can restrict mobile views – your simple choice.
- Create or update Gold-Vision Accounts, Contacts, Opportunities, Projects, Activities or Notes – instantly available to colleagues.



Gold-Vision Connect: email marketing for Gold-Vision CRM

Gold-Vision Connect is a fully automated professional e-mail marketing solution that links seamlessly with your Gold-Vision system.

We understand that your CRM database is the central point for your customer and account information; that's why we've developed an optional extension to Gold-Vision's campaign functionality. Take your marketing campaigns to the next level whilst maintaining the integrity of your contact data.

Gold-Vision Connect is an integrated solution for Gold-Vision, linked up to our hosted dedicated secure mail server. Send out professional high-volume email campaigns to your customers and prospect lists with ease.

You have no need to subscribe to a 3rd party email marketing solution and therefore no requirement to manage multiple databases or mess with uploading "CSV" files. Provide access to your external telemarketing professionals if you choose.

Gold-Vision Connect receives your Gold-Vision campaign and you can monitor responses in real time. When you choose, update your local Gold-Vision database with the results or changes.

Gold-Vision Connect Features include:

- Design your own email templates using an easy to use integrated html writer, upload a template that has been professionally designed for you, or simply select from one of our standard templates.
- Build your own image library to store logos and useful email marketing images.
- Create and manage action links and Gold-Vision Contact fields that you can then add to your emails as you want.
- Preview and test emails before sending.
- Monitor responses by campaign and by each action link. See how many recipients opened your campaign, which recipients viewed your campaign, what links they clicked and how often.
- One-click unsubscribe link that will trigger an automatic update to contact preferences within your Gold-Vision database.
- Allow Contacts to update their details – keeping your data fresh with the minimum effort.
- Review Campaign statistics to measure effectiveness and utilise to improve future communications and develop marketing strategy for more targeted successful campaigns.

Gold-Vision Connect – get to know your customers whilst they are getting to know you...



Gold-Vision Functionality Summary

- ▶ Accounts
- ▶ Contacts
- ▶ User Defined Fields / Screens
- ▶ Outlook® / Exchange® Email Tracking
- ▶ Telephone Integration
- ▶ Appointments / Outlook® Calendar
- ▶ Notes
- ▶ Process & Alert Automation
- ▶ Word® Template Documents
- ▶ Team & Activity Management
- ▶ Account Event History
- ▶ Marketing Campaigns & Mail Merge
- ▶ Sales / Opportunity Management
- ▶ Quote Management
- ▶ Project & Event Management
- ▶ Delegate Booking
- ▶ Profiling / Help Desk
- ▶ Linking of any Gold-Vision items across Accounts
- ▶ Security & Access Controls
- ▶ Microsoft SQL Server® Database
- ▶ Integrated Microsoft® SQL Reporting Services with output to Excel®
- ▶ Installed In-house or Hosted
- ▶ Microsoft Exchange® Server Integration
- ▶ Gold-Vision Database Import Manager

Options

- ▶ Financial / Back Office System Integration including Sage®
- ▶ Gold-Vision Mobile
- ▶ Gold-Vision Connect – email marketing

Gold-Vision System Requirements:

- Windows 2000 Server, Windows 2003 Server, Small Business Server 2000, 2003 with IIS configured
- Microsoft Exchange 2000, 2003, 2007
- Internet Explorer 6.0, 7.0
- Outlook 2000, XP, 2003, 2007
- SQL Server 2000, 2005 or the free SQL Server 2005 Express

Why Choose Gold-Vision?

Improve...

Enjoy innovative functionality across the full customer lifecycle, building on your existing investment in Microsoft Exchange®, Outlook® and Office®.

Empower your team – forget synchronisation issues. Your data is secure with universal browser access.

Implement successfully...

Our experienced team will work with you to help you implement your solution successfully and efficiently. Gold-Vision allows you to easily implement a whole solution, or to take a phased approach.

Our clear implementation approach is supported by a project pack that provides the information and tools for us to work successfully together.

Highly configurable – choose a solution that adapts to your terminology and business processes, and continues to adapt as your organisation changes.

Import your existing data easily with our dedicated tools.

Return on investment...

Gold-Vision is exceptional value for money – we invite you to compare overall implementation costs with comparable solutions.

Support and Maintenance includes automatic access to new core releases.

Most ongoing administration is performed by you, keeping ongoing costs to a minimum.

Long term...

Enjoy premium support from a highly qualified technical and business team who work alongside the software developers - all based in the UK. Feel free to validate this with existing customers across the commercial and non-profit sectors.

Gold-Vision uses current, scalable and open technology – Gold-Vision will grow with your organisation as your user and data requirements increase.

Integrate Gold-Vision with your other systems to reduce duplication of effort and improve processes. We offer standard integration options with several finance solutions e.g. Sage®, or the facilities to create bespoke integrations.



Call +44 (0)1788 511110

to see how Gold-Vision can make a difference for your organisation.

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www.gold-vision.com