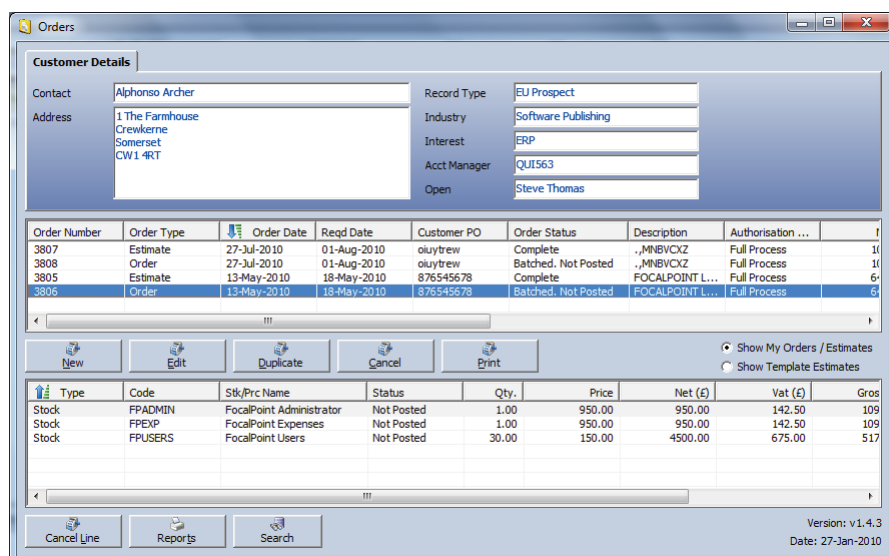


When it comes to customer data, the areas of finance and sales share significant overlap. That's why we developed GoldLink+. This productivity tool empowers your salespeople to carry out tasks usually left to finance, such as creating customer records, entering quotes and managing orders – all from the familiar GoldMine interface. Seamless integration with Access Dimensions makes GoldLink+ the easiest way to cut duplication, increase accuracy and ultimately provide a better service. This factsheet provides an overview of the activities that you can carry out using GoldLink+.



**Orders and Estimates screen:** Get a consolidated view of the sales order and estimate history for your active customer in GoldMine. Gain insightful details about the status of each order/estimate from Dimensions without the need to open the finance application. Header and detail information is available for each transaction, as well as quick links to edit existing transactions, enter new orders/estimates or duplicate historical transactions.

## Enter quotes/orders

GoldLink+ allows quotes, pro formas and orders to be entered from within the GoldMine interface, empowering salespeople to action orders more quickly and saving duplication in other departments.

### Order/quote entry

The Quote Entry function allows salespeople to create opportunities directly in GoldMine, so saving re-keying into Dimensions. This not only saves time but improves the accuracy of pipeline reporting and management. If you choose, you can also allow your salespeople to control invoice and delivery address details within the software.

To help with ease and speed of entry, previous orders and quotes can be duplicated from the main window.

All quotes, order confirmations and management reports can also be deployed into the software in a menu format. This allows easy access to information in GoldMine, Dimensions, Service Manager and other systems, all from within GoldMine.

GoldLink+ is fully compatible with multi-currency options and allows you to choose stock records, prices and text entries without having to log into Dimensions. Previous orders and quotes can be viewed and amended from within GoldMine.

### Sales orders

Workflow of sales orders can be easily managed from within the GoldMine interface. For example, your salesperson could enter a sales order with a 'Hold' status; once approved, an alert would then tell a manager to release the order.

## Key benefits

- Streamline sales/finance workflows
- Reduce data duplication
- Increase accuracy of customer data
- Improve management reporting
- Empower sales force productivity
- Action orders more quickly
- Instant visibility of customer history
- Identify cross & up-sell opportunities

## Create/update records

Integration between the customer creation windows within GoldMine and your sales ledger in Dimensions allow your salespeople to easily update active contact records. In addition, customer details can be amended in Dimensions while being logged into GoldMine.

We can also configure your field mappings so that company information captured within GoldMine can automatically be updated into Dimensions. To ensure your account records are kept clean and duplication minimised, customer code formats can also be controlled within the software.

## View customer history

### Credit information

Financial information relating to your customers can also be integrated back into GoldMine and actioned. For example, stop status, stock records and credit limit warnings can be configured within the module.

With full access to this information, salespeople can easily check availability before committing to an order and quickly view the customers' credit situation to ensure they're not selling to a customer on stop.

### Cross and up-sell opportunities

With full access to customer order history from within GoldMine, sales (and marketing) can take advantage of up- and cross-selling opportunities, basing promotions and pitches on your customers' very latest buying patterns.

## Run reports

Allow all your CRM users to report on Dimensions information directly from the GoldLink+ window – without the need to log into Dimensions. Provide configured Crystal reports through an intuitive, configurable and logical menu structure. GoldLink+ allows you to dynamically run reports without needing to enter complex parameters. For example, you can show a customer order history report for an active customer in GoldMine.

## View information 24/7

Utilising GoldMine's optional browser-based interface provides even greater flexibility, meaning your salespeople can carry out all of the above at any time of day, wherever they are.

## Who we are

Access UK is a specialist software developer and consultancy business with over 20 years' experience. Our team of expert accredited consultants operate across the UK and Ireland. Aside from an impressive array of software awards, we're also ranked 85th in The Sunday Times 100 Best Companies to Work For 2011.

Proudly independent, all our software is developed in the UK, supported locally and accessible globally. Our solutions take a whole-company approach, aiming to cut through complexity and increase efficiency. At every level.

Already field-leaders in accounting and finance, Access also offers solutions for manufacturing and distribution, professional services automation, carbon emissions measurement, reporting, payroll, document management, service management and CRM.

## Further information

For further information on the Access software portfolio, please telephone us on **01206 322575**, email **info@theaccessgroup.com** or, alternatively, visit our website at **www.theaccessgroup.com**

## Key functions – record creation

Create customers in Dimensions from within GoldMine

Definable customer codes using a variety of formats, including ARM001; 100002; free text

Definable currencies and VAT details

Support 'Custom' fields and Sales Ledger record tabs

Language options automatically loaded for sort keys

Definable field mappings from GoldMine contact record to Dimensions customer, e.g. GoldMine KEY1 to Dimensions Sort Key

## Key functions – quote/order entry

Enter and amend quotes, pro formas and sales orders into Dimensions from within GoldMine

Links to 'active' contact record when launched

View previous order header and detail information when launched

Supports Dimensions Stock, Price and Text entries

Multi-currency

Print order confirmations and quotes

Create and maintain GoldMine opportunities

Manage workflow of sales order from within GoldMine

Duplicate orders

Create and amend delivery and invoice addresses

## Key functions – reports

Provide menus of reports

Integrate with both GoldMine and GoldLink+ to allow order/contact

Specific reports to be run without the need for parameters

Run Crystal 8.5, 9, 10 or 11 reports without the need to have Crystal installed on the PC