The Enterprise Content Management solution
built on world-class CRM technology

DECIDING ON
DOCUMENT MANAGEMENT

Part II: WHY GOLDVISIONPRO FOR ECM?

A brief three-part primer on common issues related to
implementing file management on a business system.

By Robert L. Gilligan, President, GoldVision Software Corp

WHY GOLDVISIONPRO FOR ECM?

GoldVisionPro significantly improves your daily routine, and eliminates the natural constraints imposed by paper-based workflows. Here are some key reasons you should start using GoldVisionPro for your Enterprise Content Management today:

- [**PROFITABLE**] <u>Saves an average of 50% of employee time</u>. The nationally-recognized Gartner Group's research discovered that the average office employee spends up to 50% of their working day looking for the information/file they need to do their job. Even at minimum wage this represents <u>$400 per month - per employee</u>. This is a compelling reason for GoldVisionPro to be used by <u>every</u> employee. <u>GoldVisionPro makes information instantly available</u> throughout your entire organization, and simultaneously available by multiple users, wherever it is needed. Productivity is improved immediately.

- [**A BARGAIN**] <u>A fraction of the price of competing products</u>. Typical market-pricing for comparable document-management-only systems ranges from $3,500 - $5,000 *per user*, [e.g., LaserFiche, Documentum] making GoldVisionPro the value-leader in the marketplace. GoldVisionPro's affordable pricing enables customers to implement broader Enterprise Content Management [ECM] as <u>a company-wide, consistent solution for less than the cost of just one department</u> using a comparable product.

- [**EASY**] <u>Simple to use without being a technical-genius</u>. Puts all your information instantly at your finger-tips, finding what you want, *even when you don't know what it is*! Automatically tracks user-activity to provide instant access to items recently/frequently/historically used. GoldVisionPro gives many more ways to easily find what you want than competing products.

- [**ORGANIZED**] <u>Solves major problems in Corporate Information</u>. Not just access, but also <u>retention</u>. If a file is not being automatically managed, how do you know it has not been lost or accidentally deleted? Windows doesn't manage files, it just stores them. Unmanaged storage means you could have something, or you could have nothing -- you don't know!   And this is even more likely for paper-only files. <u>GoldVisionPro also intelligently manages physical files</u>, assuring they are stored in the location designated by your System Administrator, where they can be included in your automatic backup and archive.

- [**WISE**] <u>Don't be penny-wise and pound-foolish</u>. Unmanaged storage is the electronic equivalent of throwing all your paper into a large heap, instead of purchasing file cabinets to keep documents organized. GoldVisionPro is today's file cabinet, and tomorrow's as well. And Document Management with GoldVisionPro is far-less expensive than storing paper in filing cabinets.

- [**UNIVERSAL**] <u>Integrates with any application</u>. A broader solution, for *every* type of file, *any* application. Not just a scanning solution, not just a storage solution, but also a powerful file retrieval and processing solution. GoldVisionPro represents a consistent and single solution for storing and accessing every file your company needs today, and tomorrow.

- [**PRUDENT**] <u>Enables other best-practices activities, making them reliable</u>. GoldVisionPro also organizes physical files in locations and structures that are accessible, scalable, and preservable. It automatically assures files are stored properly, *without relying on employee capability*. It automatically builds hierarchal storage structures appropriate for long-term system growth and maintenance. As a result: backup, archive, and security can be reliably administered across clearly defined storage areas.

- [**BETTER**] <u>Significantly leverages existing data investment</u>. GoldVisionPro minimizes otherwise expensive ECM cost by using your existing data warehouse [GoldMine], and also <u>powerfully enhances your CRM activities</u>, for example, by using document-based information to create target customer groups [VisionPak-Plus]. File content represents far more than just record-keeping/

www.goldvisionsoftware.com
1645 E. Lockwood St.
Mesa, AZ 85203   11/2/2007

International: 480.222.0577
USA Toll Free: 866.554.5263
Fax: 480.898.7337

historical information, now file content also becomes data mining criteria for identifying target contacts for CRM activities.

- [**SMART**] <u>More information = better decisions</u>. Managed naming, referencing and storing enables you to reliably access information that was stored by others, for the topic you want. Your file information is a substantial and ever-expanding business asset. If it is gone, you could have a major problem. *Is there any difference from it being lost forever, than being unable to find it when you need it?*

- [**SYNERGISTIC**] <u>Truly synergistic.</u> <u>Really</u>! In ways that make real differences everyday in your business, and for years to come. By combining ECM and CRM capabilities in a single system, both processes are materially enhanced immediately, and even more so over the long term. This is a major advantage over other ECM products, and over other CRM systems.

  Other major products may offer a thin thread of connectivity between their ECM processes and your CRM system, and minor competing products are no more than a band-aid on just the first apparent sore-spot [e.g., scanning] of many more file-needs to come. But GoldVisionPro is built right into the <u>same database</u>, and extremely broad in its capabilities. Just as with other GoldMine items like E-Mail, History and Calendar capabilities, so too GoldVisionPro 's Enterprise Content Management incorporates a broad base of functionality into the *same environment*, building additional information into the same data structures where it becomes the basis for both its own, as well other, processes.

  For example, this synergistic interaction occurs in instances such as:

  *   GoldVisionPro auto-creates GoldMine Contact Groups for target marketing activities, based on GoldVisionPro data/text-based search criteria.

  *   GoldVisionPro accesses files by any GoldMine primary field, not just a single Contact, allowing more granular Contact record-creation in GoldMine [instead of Additional Contacts] while still being able to view a consolidation of files. For example, creating separate contact records for each person in a company, and still retrieving all documents by Company name, across multiple Contact records.

  *   GoldVisionPro search/display automatically includes files received as e-mail attachments stored in GoldMine.

  *   GoldVisionPro search/display automatically includes fax and other file-types stored in GoldMine by other programs.

  *   GoldVisionPro enhances e-mail with easy drag-drop attachment of files from multiple sources.

  *   GoldVisionPro enhances GoldMine History with document-specific [not just Contact-specific!] GoldMine History.

  *   GoldVisionPro enhances file cross-referencing by easily linking a single file to multiple Contacts.

  *   GoldVisionPro displays a selectable drop-down Title list of the previous documents stored to the GoldMine Contact, as a means of consistently titling the current file to be stored.

  *   GoldVisionPro enables tracking files to any GoldMine Project or Opportunity, while storing the files for more long-term accessibly with a Contact.

  *   GoldVisionPro automatically follows the active security setup in GoldMine, and so does not need any modification as changes occur.

  *   GoldVisionPro automatically incorporates other GoldMine criteria as well: changes in all primary Contact information, User changes, Contact restrictions, User group memberships, field label changes, etc. all intrinsically flow-through to GoldVisionPro.

* GoldVisionPro automatically recognizes the active GoldMine Contact record for stream-lined processing.

* GoldVisionPro automatically activates in GoldMine the Contact record for the file selected in GoldVisionPro.

* GoldVisionPro "tags" the physical file stored on the system with GoldMine record information.

* GoldVisionPro can find a GoldMine Contact record by looking at a physical file on the system.

* GoldVisionPro uses GoldMine functions to properly create database records, so that additional internal database requirements are maintained [e.g., T-logs].

* GoldMine data maintenance *is* GoldVisionPro data maintenance; intrinsically.   It is all the same database.