

# Creating Customers for Life.™

## Paymentech

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*-Steve Many, Associate Director of Desktop Services*

**Company Profile:** Paymentech, founded in 1985 and headquartered in Dallas, provides full-service electronic payment solutions for merchants and third-party transaction processing. Paymentech ([www.paymentech.com](http://www.paymentech.com)) is the second largest processor of bankcard transactions in the United States. The company processed approximately 2.2 billion total transactions and approximately \$54 billion in sales volume during 1998. Paymentech has major offices in Atlanta; Columbus, Ohio; Irvine, California; New York City; Salem, New Hampshire; Tampa, Florida; and Tempe, Arizona.

**Business Need and GoldMine Solution:** Prior to using GoldMine, "We were using a combination of systems and platforms to manage our customers," says Steve Many, Associate Director of Desktop Services at Paymentech's Salem, New Hampshire location. "We had a mixed platform of Windows 3.1, Windows 95, and Macintosh. The data was stored in several systems including Now Contact, SNAP for DOS, ACT! for Windows, and FileMaker Pro." The varied platforms and software programs proved ineffective in managing Paymentech's customers. Their goal was to have one unified system that would allow each department in the company to have access to the same database and customer information.

"We looked at Now Contact and ACT!, but their functionality and synchronization was not strong," states Many. "GoldMine met the majority of our criteria list. We wanted functionality to include mass mailing capability, history tracking, and remote data sharing. GoldMine met those needs."

Paymentech hired GoldMine Solutions Partner Computer Control Corporation ([www.ccc24k.com](http://www.ccc24k.com)) to install GoldMine 4.0. "We converted all the files into various formats and then imported the data into GoldMine," says Many. Currently, Paymentech has 150 users on GoldMine 4.0, including 15 remote users who synchronize regularly, in their Direct Response Division, which includes Sales, Account Management, and Merchant Services. Each department uses GoldMine to track different information about their customers, including customer feedback. Paymentech's Special Markets Sales department uses GoldMine to track all sales related history and phone calls. "Our Special Markets Sales department lives by GoldMine — they rely on it," states Many.

**Company:**  
Paymentech

**Industry:**  
Financial Services

**Contact:**  
Christine Cochran  
Software Analyst  
Steve Many  
Assoc. Dir. of Desktop Services

**Number of Users:**  
150

**Business Benefit:**  
"GoldMine has improved our ability to generate accurate mass mailings," says Many. "We need to communicate several updates of regulations and fees frequently to merchants. Prior to GoldMine, we never knew if we were getting the information to everybody."

**Add-On Products:**  
FaxRush

**Solutions Partner:**  
Computer Control Corporation

**GOLDMINE**  
Software Corporation

Paymentech uses GoldMine's Automated Processes to automate follow up calls, letters, and appointments. "We used Automated Processes to manage the conversion process of our customers from an older platform to a newer platform," says Many. "Automated Processes will automatically remind someone in another department of an issue by creating a pending activity. For example, the Automated Process creates a letter based on a group of contacts. It then schedules a call for sales to determine if the letter was received. Once the Automated Process is complete, it automatically sends a message to Finance to close the account."

GoldMine's document merging feature allows Paymentech to manage mass mailings and assures consistency in the message that is delivered to their customers. "GoldMine has improved our ability to generate accurate mass mailings," says Many. "We need to communicate several updates of regulations and fees frequently to merchants. Prior to GoldMine, we never knew if we were getting the information to everybody." Paymentech has customized a number of merge forms, including Y2K letters and contract renewals.

Paymentech uses GoldMine's Report Writer to create customized reports. Many explains, "We have customized a history report, which is called a Feedback Report. This report is run monthly and provides positive and negative responses from our clients." Christine Cochran, Software Analyst at Paymentech, adds, "GoldMine reports are fairly simple to customize and the contact reports provide good information."

With the help of Computer Control Corporation, Paymentech customized the key fields and created numerous user-defined fields and field views within GoldMine. Cochran states, "The key fields provide detailed information on each contact including Contact Type (job description), Sales Category (sales cycle tracking), and Merchant Agreement Number. We also have 12 customized views. One example is Sales Data, which contains information important to a sales rep, such as type of business and financial information for the record. Another example is Y2K Data, which stores information that triggers some of our Automated Processes. This view maintains a history log of dates, which outlines when specific letters were sent to vendors and additional Yes/No fields, which document responses from letters. The Automated Processes are triggered based on the Yes/No responses."

Paymentech has also taken advantage of GoldMine's add-on products. Currently, they are using FaxRush by Z-Firm ([www.faxrush.com](http://www.faxrush.com)), to integrate their faxing requirements with GoldMine.

GoldMine has provided Paymentech with a superior customer management solution. It has met their need to share data throughout the Direct Response division of the company by keeping all of their customers in one networked database. In addition, GoldMine's ability to be customized and its synchronization has only enhanced its successful implementation at Paymentech.

**GOLDMINE**  
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