



Illustration by Kevin O'Keefe



# Personal Service

Today's contact and personal information manager combinations **keep you organised** and your work colleagues informed. We evaluate six advanced systems.

**E**veryone can benefit from keeping track of their contacts and schedule. Over the years, computers have taken personal information and contact management into new realms. Simple, paper-based lists have evolved into cross-referenced, automatically updating systems which can often be shared with colleagues.

More than that, software which simply manages your contacts and diary has been replaced by advanced applications which can also track activities in relation to each particular contact. They can issue reminders, manage expenses, take part in document production and management, help with email and other forms of communication, and carry out some tasks automatically.

**Here we look at** some of the most popular contact and personal information managers on the market, evaluating their performance in a range of key areas. We are particularly interested in how they handle their basic functions of contact and diary tracking, and also

how they cope with email and internet access as these become increasingly important forms of communication.

We've concentrated on the big, well-featured, shared-access packages that can offer organisation-wide contact and personal information management. We start with a look at applications more suitable for standalone users.

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## CONTACT MANAGER OR PIM?

**W**e've used the term 'contact and personal information managers' for the software in this round-up, although such packages are usually divided into separate categories — contact managers and personal information managers, or PIMs.

PIMs tend to handle information which is for your eyes only and operate on a standalone basis. Contact managers lean more towards shared systems operating within a workgroup.

But the dividing line between the two forms is becoming thinner and

more difficult to draw. Most groupware-styled applications provide space for personal data, and many PIMs provide functions such as group scheduling or communications mechanisms. Hence the use of the more general term in this group test.



# Individual packages

Three packages emerge as the top-ranking examples of software suitable for individual use: **Outlook**, **SideKick 98** and **Lotus Organiser 5**.

In addition to evaluating basic functionality, many people will understandably make their selection on the more subjective basis of look and feel. Ease of use is a key factor in any application which you will want to access many times a day.

Organiser 5 is perhaps the most familiar-looking of the three, as it is designed to resemble an old-fashioned Filofax, with tabbed 'pages' which take you to sections such as the to-do lists, calendar and contact database. Similarly, SideKick 98

takes a card-file approach that is extremely easy to navigate. Outlook, although less familiar in look and feel, will strike a chord with anyone who has seen other Microsoft applications using a vertical sidebar of shortcuts.

Organiser and SideKick both score particularly well on the ease with which data is entered and retrieved. A double click on any of Organiser's tabbed areas opens a data-entry screen and the resulting dialogues are usually small and easy to navigate. Work, home and general information is entered separately and you can add up to 20 custom fields.

## SideKick organises contact information

in a freeform card file. Field numbers are unlimited and you can use card files to store any kind of information, from wine lists to ideas and thoughts. Swapping between opened card files is done by clicking on tabs. As well as this flexibility, the package offers autodialling of phone numbers, opening URLs and starting your email package by clicking. For anyone wanting a shallow learning curve and plenty of functionality, this is an excellent choice.

In contrast, Outlook's apparent



complexity may be daunting for newcomers. It offers a wide choice of views of your contact database, which you select from a menu. You can customise these and define your

own. To add contacts to the database there are tabbed boxes, one of which allows you to add new fields, either defining your own or choosing from a large number already supplied. Outlook also includes an excellent feature called Outlook Today which summarises diary dates, to-do tasks and incoming email for the day. Lotus Organiser has a similar Day Planner view on its calendar.

## When it comes to email integration

Outlook is the star, with capabilities which include filtering options, sending emails in HTML format, and defining multiple signatures for professional and non-professional use. Organiser supports iCalendar internet-based scheduling and can cope with emailing contacts, but it depends on an external MAPI mail client to provide all the facilities, as does SideKick.

A double click on an email address in SideKick launches your email package, ready for you to compose the message. Like Organiser, SideKick implements a form of internet email-based group scheduling.

The range of features on offer may be crucial to your buying decision. Like the rest, Outlook has the basics of contact,

- ◀ **SIDEKICK'S CARD-FILE APPROACH IS EASY TO NAVIGATE**
- ◀◀ **OUTLOOK HAS FLEXIBLE VIEWING OPTIONS AND WELL-INTEGRATED EMAIL FACILITIES**
- ▼ **ORGANISER'S HOSPITABLE LOOK AND EASY DATA ENTRY MAKE IT EASY FOR BEGINNERS**



calendar and task management, which it augments with email capabilities, a Post-It-note-style function, and facilities to send faxes thanks to a version of the WinFax software. Organiser augments its basic feature set with a calls list, year planner, anniversary planner and freeform notepad, and a range of standard formats for adding your own tabbed organiser sections. SideKick comes with an expenses manager, Earthtime calendar, and memos area for storing letters and other documents.

## PCW DETAILS



### Lotus Organiser

**Price** £71.68 (£61 ex VAT)

**Contact** Lotus 01784 445808

[www.lotus.com](http://www.lotus.com)



### Starfish SideKick

**Price** £29.99 (£25.52 ex VAT)

**Contact** Starfish Software

0181 875 4455

[www.rmg.co.uk](http://www.rmg.co.uk)



### Microsoft Outlook 2000

**Price** £99 (£84.25 ex VAT)

**Contact** Microsoft 0345 002000

[www.microsoft.com](http://www.microsoft.com)



# Shared packages

Increasingly, even the smallest of organisations is realising that sharing access to the type of information handled by personal information and contact manager software offers a range of benefits. If information has to be edited only once to ensure up-to-date access for all staff, for example, there's a reduction in the administrative burden.

Efficiency rises when a single database of contacts and other information is centrally maintained. Just as important, if one person knows what colleagues have been doing in relation to contact with a client, the public face of the organisation is enhanced. Dealing with clients, most commonly on a sales-related basis, is where the group contact and personal information managers come into their own.

## ■ Contacts tracking

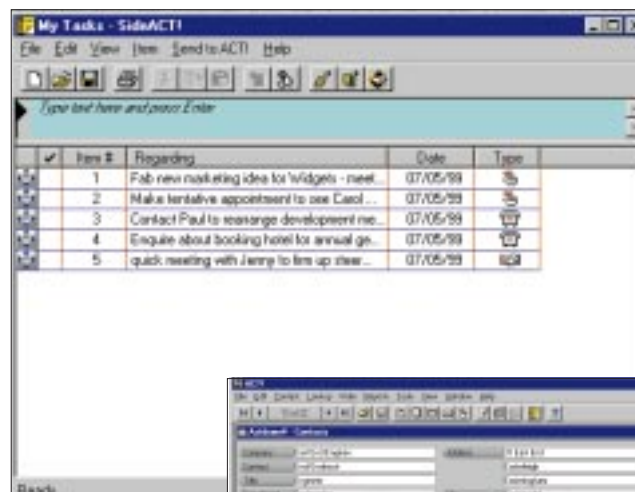
Contact and personal information managers aimed at workgroups have many of the same basic functions at their core as software designed for standalone users. People expect many of the same basic facilities, in particular ease of use and the ability to customise the contacts database.

You would also expect any group-based contact manager worth its salt to offer the ability to add fields, and **GoldMine 4**, **Maximizer 5** and **Act 4** are all packages that can handle user-defined fields.

The management and display of database information provides an excellent illustration of how different contact managers vary in their approach to the job. GoldMine, for example, displays its essential information, such as name, address and phone number, in a pane at the top of the screen.

The rest of the information about each contact, including contact history, outstanding actions and copies of any correspondence made, are stored under tabbed windows. These tabbed areas are excellent for providing quick access to detailed information without cluttering the screen. Ultimate flexibility is catered for, as you can decide what information is shown under each tab and set up your own tabs, as well as create custom fields.

Maximizer 5 allows you to allocate



newly created fields to companies, contacts or individuals.

Act 4 has the very useful option of creating drop-down lists in fields added by the user.

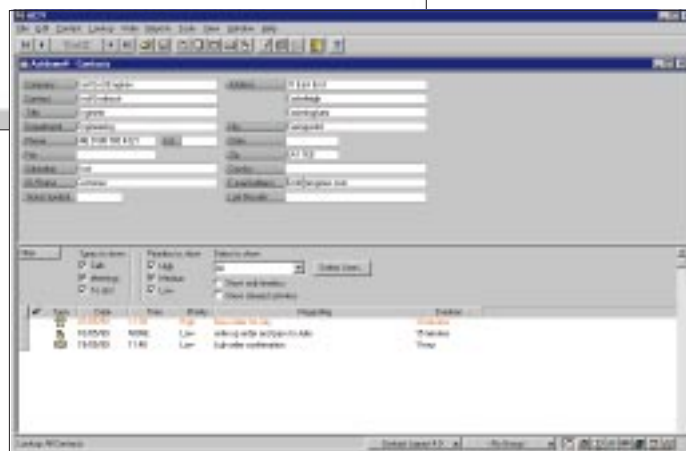
This could be handy for speeding up data entry or controlling the classes of information entered into a field. In terms of display, though, the two applications differ considerably.

Act 4 looks rather like GoldMine as it, too, separates basic contact details from more detailed information stored in a tabbed display area. Maximizer 5.0 has a much busier display area which can simultaneously show three different classes of information relating to a contact. It looks cluttered, and the Outlook-like side window doesn't help matters; but it's very flexible once you've got the hang of it.

**Handling activities** with contacts involves, in part, corresponding with them in a variety of ways. Maximizer 5 and Act 4 both come with their own word processor. Although these are not as fully-featured as commercial packages, they are perfectly adequate for drawing up form letters and faxes. You can also use them to design correspondence which can then be mail-merged with addresses or phone

◀ **SMALL, AND WITH VERY FEW FEATURES, SIDEACT SITS IN YOUR SYSTEM TRAY AND WORKS LIKE AN ELECTRONIC POST-IT NOTE SYSTEM**

▼ **ACT DELIVERS BROAD CONTACT INFORMATION AT THE TOP OF THE SCREEN, WITH DETAILS BELOW**



numbers from the contact database for faxing or posting.

GoldMine 4 offers fax and posting options, too, but it resorts to Notepad for document creation unless you install a special linking applet that works with Microsoft Word.

**Ultimately, what we all want** from our software is a measure of intelligence. When it comes to making the most of contacts, one of the more useful forms this can take is reminding us to take necessary actions. Reminders and alarms are a standard feature of contact and personal information managers, but GoldMine 4 goes one better. It can run automated processes courtesy of what it calls software agents.

These processes can take any form you like, from sending out reminders to 'sleeping' contacts, to sending a follow-up call notification to an employee a certain number of days after an initial contact has been recorded. In effect, it can take some of the more mundane aspects of your job off your hands.

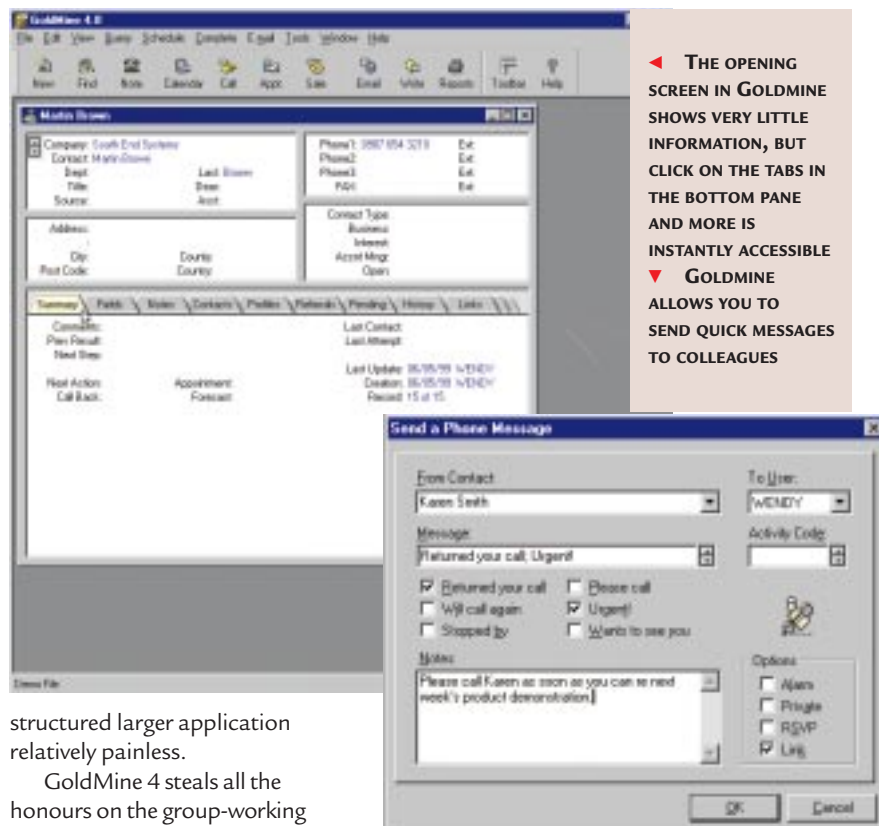
Configuring software agents can be a little complex, but no programming skills are required and the printed reference manual offers excellent help. None of the other applications in this round-up offer this level of flexibility, although Maximizer 5 and Act 4 both have a macro recorder which can be used to automate some tasks.

### ■ Diary and resources tracking

It is essential that a workgroup-orientated contact manager allows people to share resources of all kinds. This matters as much for the types of contact information at which we have been looking, as it does for diary and scheduling information.

The way Act 4 handles this job shows the range of what you might be entitled to expect. If you share access to Act 4 with colleagues, you can schedule activities for other users as well as for yourself. On your own calendar, you can designate activities as private which cannot then be viewed by the wider group. If they are not designated as private, activities can be viewed by other users when, for example, there's a need to find a time slot to schedule a meeting for several people.

Maximizer 5 is really suitable only for smaller workgroups of up to about ten people and lacks all the bells and whistles of group scheduling. But it does come in a larger version, called Maximizer Enterprise, which caters for larger workgroups and has improved client/server functions. The upshot is that while you should not expect too much of Maximizer 5 in terms of data sharing, when your need for it arises you should find the upgrade to the similarly



◀ THE OPENING SCREEN IN GOLDMINE SHOWS VERY LITTLE INFORMATION, BUT CLICK ON THE TABS IN THE BOTTOM PANE AND MORE IS INSTANTLY ACCESSIBLE  
▼ GOLDMINE ALLOWS YOU TO SEND QUICK MESSAGES TO COLLEAGUES

structured larger application relatively painless.

GoldMine 4 steals all the honours on the group-working front as the most effective application for sharing information, largely because of the extras it adds to standard calendar sharing. For example, you can take a phone message and route it to the appropriate colleague using the internal phone message facility within the software — a straightforward matter of completing an electronic version of a fairly standard phone message pad.

There is also an internal email facility for quickly sending general messages to colleagues. On top of that, GoldMine 4 includes an invaluable resources scheduler which

allows users to book meeting rooms, presentation equipment and the like.

Remote synchronisation is also important. As well as standard data exchange with notebook or desktop computers, Act can share data directly with Windows CE machines. There's a special version of Maximizer, designed for CE, which works in conjunction with the bigger, desktop version.

**There's a further aspect** to resource sharing which we haven't yet touched upon. It relates to information specific

## IT'S THOSE LITTLE EXTRAS THAT COUNT

**Added features in a package may be just what you're after**

The market is tight for contact management applications and often they try to come up with features that help them stand out from the crowd. One of these added features could be what tips the balance.

If sales management is the main reason for wanting a contact manager, then GoldMine's Opportunity Manager could be that extra inducement.

It allows managers and sales teams to track a sale, generate sales forecasts and produce detailed reports.

For ACT! 4.0, the unique selling point is SideAct, a small, separate application which sits in the system tray so that it is accessible even when Act is closed. It allows you to make jottings of things to do, meetings to set up, ideas and so on. It's an electronic equivalent

of the Post-It Note, except that you can also copy or move items into Act with a click or two.

SideAct records to-do items, calls and meetings, and passing the cursor over its icon in the system tray tells you how many tasks in each of these categories remain outstanding.

Maximizer 5 offers two elements of added value. The first is its upgrade path:

progress from the smaller Maximizer 5 to the larger Maximizer Enterprise should be relatively painless because both applications look and feel similar. This could be vital for a small organisation with intentions to expand. The other is its e-commerce website builder, which could be a real boon for any organisation wanting to get a basic selling website up and running but lacking in-house HTML skills.





◀ A WEBSITE BUILDER BASED ON A TEN-SCREEN WIZARD HELPS TO CREATE AN E-COMMERCE SITE IN MAXIMIZER

▼ MAXIMIZER'S DISPLAY IS QUITE CLUTTERED BUT, ONCE MASTERED, IT CAN BE SET TO SHOW PLENTY OF DETAILED INFORMATION

to your own company, whether about products, services or internal procedures. Both GoldMine 4 and Maximizer 5 provide good facilities for managing this kind of information.

GoldMine's InfoCentre comprises two areas: the Knowledge Base and the Personal Base. Both can contain text-based documents, graphics, multimedia files and so on. While information in the Knowledge Base is shared, everything in the Personal Base is private. Up-to-date versions of important information can be placed by any worker in the InfoCentre for quick reference, and the branching tree structure and a search tool help users to navigate through them.

Maximizer 5 has a similar feature in the form of My Company's Library, which also stores important information in one place for quick reference.

#### ■ Email and intranet integration

Communications is increasingly dominated by the internet and intranets, and a good contact and personal information manager must be able to handle these. We have already mentioned email merges but there are, of course, many other aspects to this form of communication.

Maximizer 5 is a good example of how this class of software is trying to embrace the internet. It comes complete with an e-commerce module which allows you to build your own website for selling on the internet. To build a website you simply follow a wizard, deciding on colour and design for your site by selecting a template and adding information by making choices on the wizard's screens.



You don't need to understand HTML to be able to do this, and the end result is a website that is quite good enough for you to dip a toe into the uncharted waters of trading on the internet. When the site is up and running, incoming information, including enquiries and orders, is automatically integrated into Maximizer's email centre. This works in conjunction with Microsoft's Outlook, Eudora or Lotus Notes and can be used to compose, read and send emails.

#### On a more mundane level,

Maximizer 5 can link directly to a contact's website and can even be instructed to automatically conduct a search for information about a contact. There's a special menu dedicated to web options which provides for this and other online features. If you're lucky enough to have a permanent connection to the internet, then using the web via Maximizer 5 is a seamless operation.

Act 4 takes a much more contact-orientated approach to its integration with the internet. It can automatically link you to a client's website, provides

POP3/SMTP email creation, and will work with external email applications such as Eudora Pro. It does not, however, have any website creation tools.

GoldMine 4 has its internal email system which allows you to communicate with colleagues across the office intranet without leaving the application. This is supplemented by the E-Mail Centre, which is

designed for working with contacts and clients across the internet and includes facilities for creating, sending and receiving emails. The email creation tool includes basic formatting elements such as fonts and a spell-

checker. GoldMine 4 also offers some fairly sophisticated additional options such as the ability to queue messages for sending, use encryption and manage vCards. The sending of emails can be automatically recorded as an event associated with the contact to whom they are directed.

#### PCW DETAILS

★★★★★

##### Maximizer 5

Price £175.08 (£149 ex VAT)

Contact Multiactive Software  
01628 587 777 [www.multiactive.co.uk](http://www.multiactive.co.uk)



★★★★★

##### Symantec Act 4

Price £233.83 (£199 ex VAT)

Contact Symantec 0171 616  
5600 [www.symantec.co.uk](http://www.symantec.co.uk)



★★★★★

##### GoldMine 4

Price Single-user £464.13 (£395 ex VAT);  
Five-user £1968.13 (£1675 ex VAT)

Contact AVG Sales & Marketing  
0171 353 2222 [www.goldmine.co.uk](http://www.goldmine.co.uk)

# Editor's Choice

With so many features, the term 'contact and personal information managers' seems a little confining for some of these packages. But in fact, there is always more that this kind of application can offer. Indeed, one of the great challenges of the genre is to keep things manageable while providing the kind of feature set and flexibility that will suit the widest range of users.

It is somewhat ironic that SideAct, the applet that sits in your system tray and records notes about phone calls, meetings and to-do items, has any kind of place at all in a genre of software which is supposed to provide quick and easy access to all the information you need in a working day. But the concept of smaller, dedicated applets is something we might expect to see in future iterations of the larger, more bloated contact and personal information management tools.

**Other features** likely to emerge include applets for running on handheld computers that are sold in the main box rather than as separate applications; and improved conduits for sharing data between a variety of handhelds and the main computer by direct cable or infra-red connection.

**It is always difficult** to compare contact and personal information managers because of their huge spread of features, and because personal preference in design and accessibility plays a significant part in every user's decision to buy.

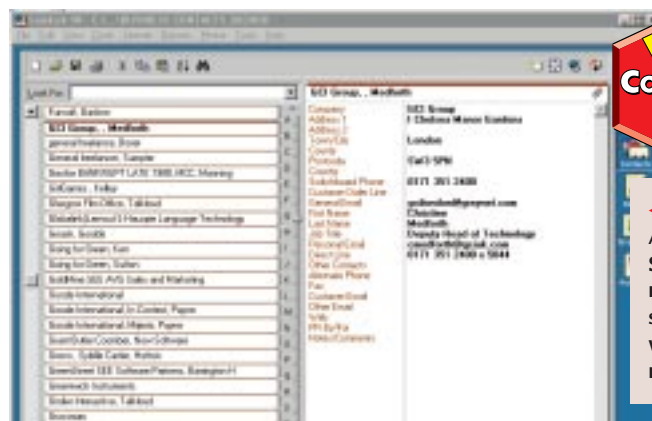
The choice was particularly difficult where the **standalone products** are concerned. We liked the email strengths of Outlook and the straightforward, no-nonsense approach of Organiser, but we finally selected **SideKick** to receive our **Editor's Choice** award. It is so flexible that you could use it to store

information about almost anything you like, yet it remains true to its diary and contact management roots. With its shallow learning

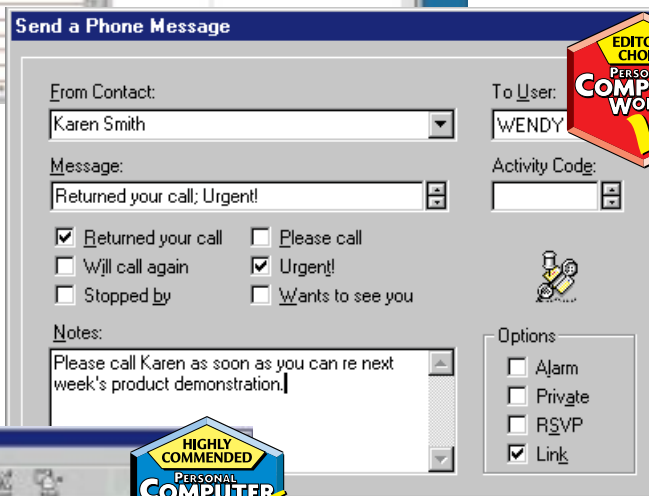
curve and very affordable price, it is an excellent place for any newcomer to start — and many users may well decide never to move on.

Among the **groupware applications**, deciding on our **Editor's Choice** was rather easier. **GoldMine** is a hands-down winner. It's a fine application, with the kind of flexibility that should make it work for most situations.

GoldMine's ability to manage resources as well as people, its facilities for internal email, its clever software



◀ **EASY TO LEARN AND EASY TO USE, SIDEKICK IS PARTICULARLY SUITABLE FOR ANYONE WANTING A SHALLOW LEARNING CURVE**



▲ **GOLDMINE** ALLOWS YOU TO SEND QUICK MESSAGES TO COLLEAGUES  
◀ **MAXIMIZER'S WIZARD HELPS YOU BUILD A WEBSITE**

agents and the excellent Info Centre for storing information about a company for ready

reference, all set a standard for what anyone should expect from a contact and personal information manager.

Our **Highly Commended** award goes to **Maximizer 5**. It's a good, solid application that will satisfy most corporate needs for contact and personal information management. We particularly like its unrivalled facilities for generating e-commerce related websites, which we expect others might emulate in future iterations.

While its rather cluttered screen appearance takes a little getting used to, Maximizer is a very scalable product. We also like the fact that the upgrade path to the larger Maximizer Enterprise should require little additional learning.

# Case study: Goldmine

Hidden depths help in **selling** building products.

**R**yttons Building Products, based in Kettering, has been using Goldmine since the beginning of this year. Prior to that, Ryttons had been using a DOS-based package called Telemagic for ten years, but it was not Year 2000 compliant so a replacement had to be found.

Ryttons looked at all the contact management products on the market before choosing Goldmine. Roger Irwin explains the company's choice: 'Goldmine won because of its flexibility, because it dovetailed with Microsoft packages, and because Goldmine is constantly developing the product.'

Goldmine is regularly updated, usually quarterly, and the updates are sent automatically to users. This has impressed Ryttons, and the firm has been even more impressed by Goldmine's responsiveness to suggestions and queries and by the helpfulness of AVG, Goldmine's UK distributor. Ryttons

currently holds a 15-user licence, primarily for its telesales and sales team, although other support staff also have access to the package.

The company uses Goldmine principally to build up customer profiles and to log all calls to clients. Whoever takes the first call, the next person to speak to the client can immediately find out where things stand with that client. This makes staff more responsive to their customers' needs and focuses their efforts while they're on the telephone.

Goldmine's integration with other packages has also been a boon. Irwin sites its integration with Word and with Faxrush, a third-party add-on fax package promoted by Goldmine, as an advantage in terms of productivity.

'We have been able to tailor-make



Goldmine to enable us to be more responsive,' he says.

Irwin adds that he is also impressed by Goldmine's synchronisation and reporting features.

# Case study: Act

Not hard to follow, Act keeps NDC **workers in touch**.

**A**CT was first introduced at NDC Infrared Engineering about two years ago and the firm has just upgraded to version 4.

There are currently about 15 users of the system, in sales, marketing and management roles, and the number is growing as offices in Germany and the US are given access via a remote server.

Norman Cook, an independent consultant who is implementing the adoption of Act at NDC, is a fervent supporter of the application.

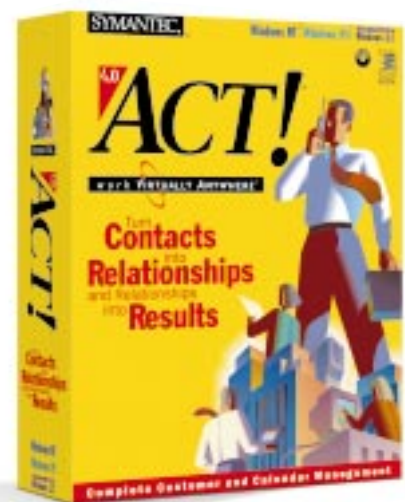
'As a time, organisation and contact management system, it is probably the best,' he says. 'It is flexible and easy to use, and people with differing levels of computer competence can use it.'

Cook rates the package's ability to generate marketing and sales analyses very highly and likes its integration with Word and Outlook. He also likes the fact that it is flexible enough to carry out

a multitude of tasks very effectively, while at the same time forcing less experienced users to standardise the information they put in, making any reports generated by the program more accurate.

The package's remote synchronisation features have proved a real advantage. Users in the German office will be able to access any data altered at head office, without the need for lengthy phone calls to keep them informed. Any user out on the road can also dial in and update the database.

Cook says: 'All members of staff can plug their laptop into a telephone line, dial in and synchronise as if they were in the office, no matter where they happen to be. The first synchronisation is lengthy and this is always done in the office on



the LAN, but after this, the synchronisation is done on a changed file basis only, so it's quick. We thought about doing it by email, which is more secure, but this would involve using CompuServe on the road and Outlook in the office.'