ContactTracking.com
AFFORDABLE CRM SOFTWARE SOLUTIONS

New Features Update

For Administrators

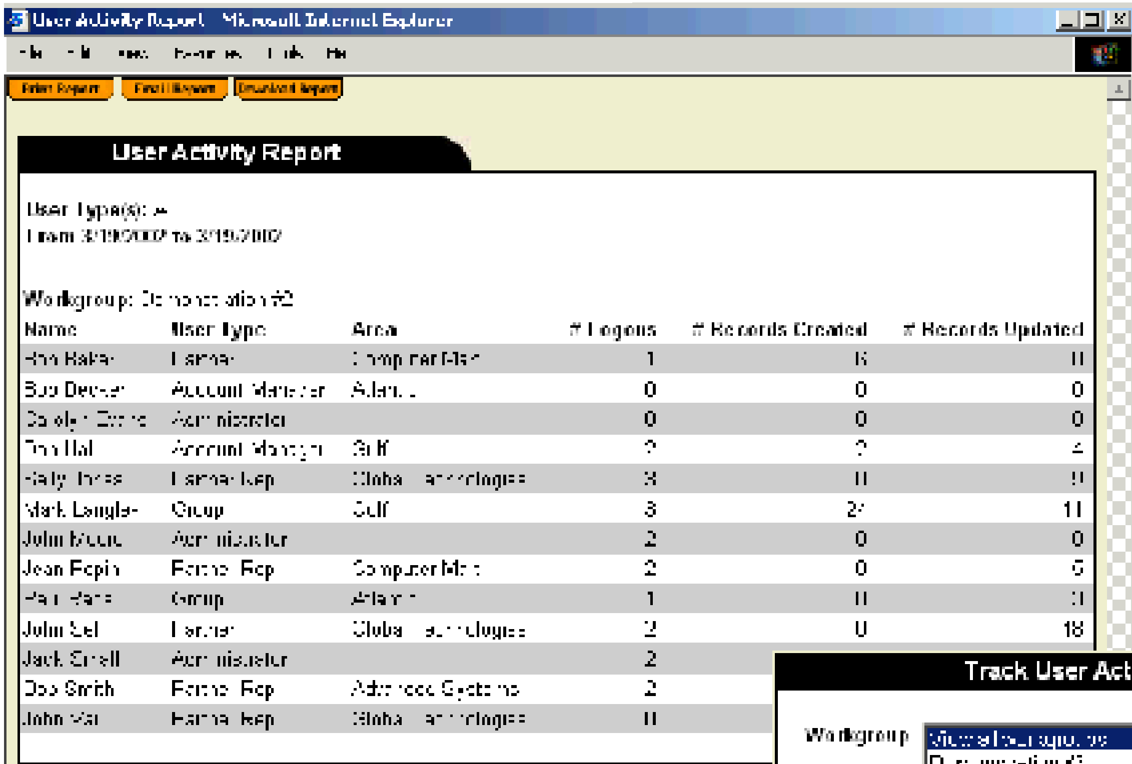

Figure 2: Sample User Activity Report

15 April 2002

Contact Tracking has developed a number of new functions that may be of particular interest to administrative users. All of the enhancements described below have been incorporated into the application; security parameters specific to each function are noted in the relevant sections below.

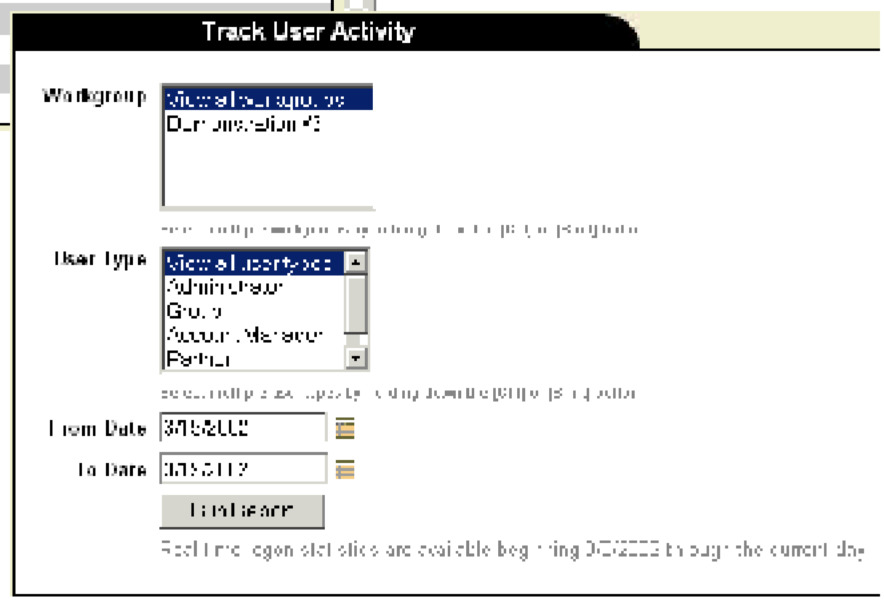

Figure 1: Set Start/End Date, Workgroup/User Type Filters for User Activity Report

Track User Activity

A new function has been added to the administration area of the system that allows authorized users to review the activity of the users in their database(s) through a User Activity Tracking report. This report, which can be run for a specific date or a range of dates, includes the name and user type for each user, the number of times they have logged into the system during the requested time period and the number of records they have added and updated. These real-time logon statistics are available beginning 3/8/2002 through the current day. Please note that if your logon account has access to multiple databases, the interface will allow you to run reports on user activity for all of your databases.

Action required to gain access to this function. Access to the Track User Activity function is set in each user's individual security profile. If you would like to add access to this function to your own account and/or to other specific user accounts you manage, add this permission to the account(s) in question through the edit logon function of Logon Management (in Administration). Add a checkmark to the Track User Activity box (in the Command Privileges section) and then click Next in the upper right corner of the screen to submit the change. If you do not have access to Logon Management through your account, please contact your Contact Tracking account manager to gain access to the Track User Activity function or send an email to support@contacttracking.com stating the specifics of your request.

To run a User Activity report: Click on Administration at the top of any page and select Track User Activity. If desired, filter the report results by choosing one or more workgroups and/or user types to include in the report. Then enter the start and end date for the report and click Run Report (**see Figure 1**).

If multiple workgroups have been selected, the report will list the statistics for each workgroup separately, with results displayed alphabetically by workgroup name. Within each workgroup, the User Activity Report is sorted alphabetically by user last name. The **Area column** lists the Organization or Partner with which the user is associated.

If a user has access to **multiple databases** from a single logon, their logon counts and updates are tracked for each workgroup. A logon count is triggered for a specific workgroup when the user begins a user session by logging into the system from the main logon page as well as if the user clicks the "Change Database" button within the system to switch between workgroups.

A record is considered **updated** when the user performs a Sales Update or Full Edit, edits a Custom Form associated with the record, assigns/reassigns the record or updates the record(s) through the Forecast Update Report.

To Print, Email or Download the report: Click on the appropriate orange button at the top of the report page to launch the function (**see Figure 2**). Report downloads are saved in .csv format and can opened in any standard spreadsheet program, such as Microsoft Excel.

Download WSIWYG Reports

In addition to the standard and custom download functions available from the search results screen, you can now download reports. This download will allow you to view and save the records in .csv file format; the report download is a WYSIWYG (What You See Is What You Get) function, meaning that the downloaded file will include exactly those fields displayed in the report, and will also retain any sort parameters you selected when running the report.

To download a Report: Run the desired report using either the quick Reports button from the top of the page (keeping in mind that this report will include all of the records in your database) or, if you wish to be more selective, run a Search to narrow the results and then click on Report Filter. After running the report, on the report display screen, click the Download Report button to launch the download function. The resulting .csv file can be opened in most common spreadsheet applications, such as Microsoft Excel. Print and Email functions are also available from the report display screen.

Limits increased! When **downloading** records either through the Reports function or the Search Results, there is **no limit** on the number of records that can be included. For **print and email** functions, we have increased the maximum records limit from 500 to **5,000** records. Please be aware that when printing or emailing records or reports, the processing time will depend on the number of records included as well as the speed of your internet connection.

Set Personalized Default Setting for Spell Check

We have added the capability for users to set the default setting for the recently launched spell check feature to On or Off through the User Settings panel of the application. Whether the spell check default is set to On or Off, the user can always change the preference for a specific page by clicking on the Spell On/Off button to toggle between the settings for the current page.

To change the Spell Check default setting: The system default is set to launch the spell checker if the user enters or change any text in any of the fields on the page with spell check capability, as indicated by the Spell On button on the relevant pages. To change this setting for your own user logon, click on User Settings at the top of any page and in the Spell Check section in the lower right-hand corner, set the default to Spell Check ON or Spell Check OFF, according to your preference and then click Submit (**see Figure 3**). This setting will be effective immediately and will remain in place until you should choose to change it again.

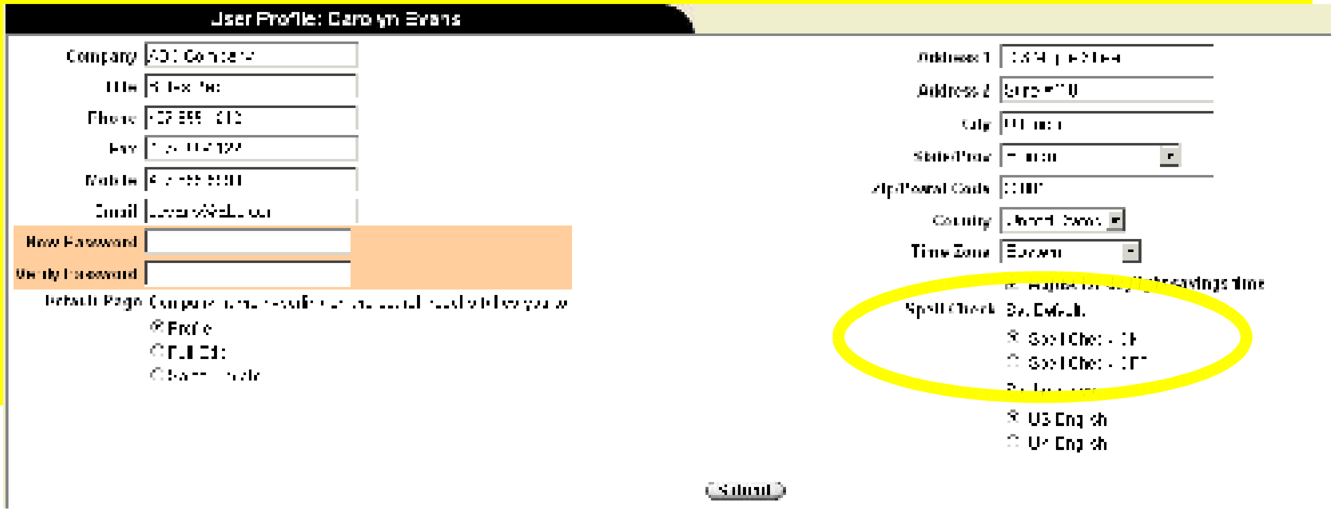

Figure 3: Setting Spell Check Default in User Settings

Customize Express Email Notification Content

It is now possible to customize the content of **Express Email Notification** messages sent to your users, just as you do for the daily email notification content.

To customize express email notification content: To access this function, click on Administration from the top of any page and then click on the Express Email Notification Content hyperlink. Enter the text that you wish to include with each email notification in the Body text field; this message will be displayed in the email above the details for the new lead. You can also customize the message Subject, From Name and From Address field. Be sure to use a valid email address in the From address field. Details specified here define the content for **all** Daily Email Notification messages sent to all users for this database who have daily email permission turned on in their user security profile. Note: If you have access to more than one company or database, be sure to double-check that you are editing the content for the correct company by confirming that the appropriate Company name appears in the drop down box at the top of the Express Email Notification Content page.

What is Express Email Notification? When a new lead is manually added and assigned to a user(s) or an existing lead reassigned on an individual record basis (i.e. not using the bulk assignment function in search results), an **Express email** is immediately sent to the user(s) to whom the lead is assigned to alert them to the new lead. This differs from the **Daily email** notification messages sent out daily at approximately 1:00 AM ET which summarize all new, reassigned and expiring leads as well as callbacks for the current day. Security permissions for Express and Daily Email are set separately in the user's security profile.

Create Public Download Templates and Saved Searches

In addition to the Saved Searches and Custom Download Templates specific to each user through their individual logon, you can now create Search and Download Templates that can be made Public. A Public Search or Download Template can be accessed by all users with access to that workgroup. Note that for Download templates, a user must have Download privileges in order to view and use a Public Download Template. Only the user who creates a particular Public

Search or Download Template can Delete or Edit (Download templates only) that particular template. A public search or download template or search is denoted by the addition of the term "(public)" at the end of the template name.

Action required to gain access to this function. Access to the Public Templates/Search function is set in each user's individual security profile. If you would like to add access to this function to your own account and/or to other specific user accounts you manage, add this permission to the account(s) in question through the edit logon function of Logon Management (in Administration). Add a checkmark to the Create Public Search/Download Templates box (in the Command Privileges section) and then click Next in the upper right corner of the screen to submit the change. If you do not have access to Logon Management through your account, please contact your Contact Tracking account manager to gain access to the Track User Activity function or send an email to support@contacttracking.com stating the specifics of your request.

To create a Public Saved Search: If you have Public Template permission (see gray note above) when you create a Saved Search from the Search Results page, you will have the option of marking it Public (**see Figure 4**). All users with access to this workgroup will see this template listed under their My Searches button on the main Search page. As the creator of this Public Search Template, you are the only user who can delete this template. If you have access to multiple workgroups, note that the Public Search Template is only created for the workgroup that you are currently logged into; you must be logged into this workgroup to access or delete this Public Search Template.

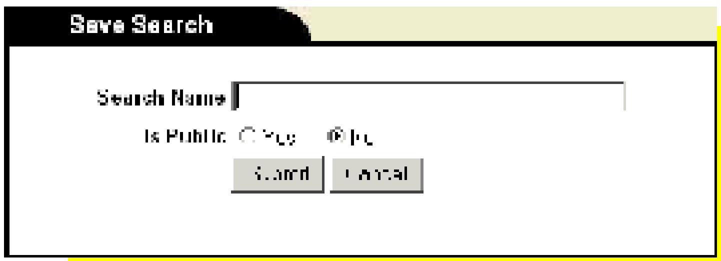

Figure 4: Saved Search Interface with "Public" Capability

To create a Public Download Template: If you have Public Template permission (see gray note above) when you create or edit a Download Search Template using the Manage Custom Downloads area accessed from the Search Results page, you will have the option of marking the Download Template Public by choosing the database for which you wish to make this template public from the drop-down list (**see Figure 5**). All users with access to this workgroup who have Download privileges will see this template listed in the Download Search drop-down list on the Search Results page. As the creator of this Public Download Template, you will be able to access and manage this template through your logon; no other user can edit or delete this template. If you have access to multiple workgroups, note that you can access or manage this template from any of your workgroups.

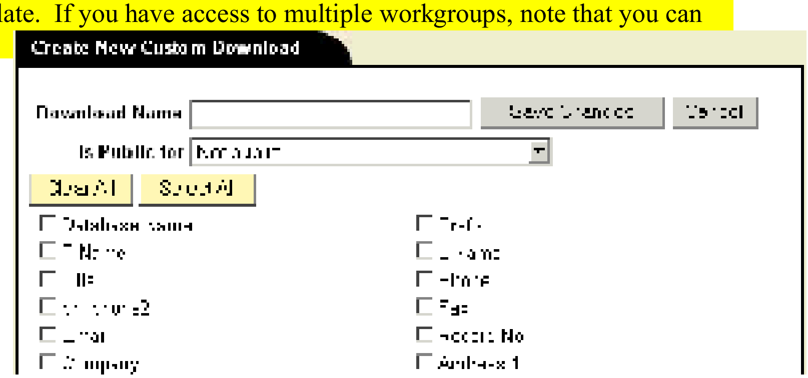

Figure 5: Download Template Interface with "Public" Capability