

New Features Overview

Product News

11 June 2001

Express Forecast Update

Accessible to most users (see note) through a hyperlink on the Information Center page, the new Express Forecast Update feature facilitates quick and easy updating by displaying key sales fields for all active leads on a single screen. Clicking on this hyperlink generates a real-time report of all records to which the user has access, compiled in order of Forecast Date (ascending) and Lead Value (descending). Items with no forecast date entered appear first. Items highlighted in green indicate leads with past due forecast dates.

Forecast Update							Records 1 thru 10 - (21 total records)
Month	Lead	Lead Name	Lead Value	Probability	Lead Stage	Forecast Manager	
May-2001		Telecom Software	\$700,000	10%	DISCUSS	John Deard	John Deard
May-2001		James Book	\$100,000	0%	DISCUSS	John Deard	John Deard
May-2001		Telecom Software	\$100,000	15%	DISCUSS	John Deard	John Deard
May-2001		James Book	\$50,000	15%	DISCUSS	John Deard	John Deard
May-2001		Telecom Software	\$100,000	0%	DISCUSS	John Deard	John Deard
Jun-2001		Telecom Software	\$1,000,000	10%	DISCUSS	John Deard	John Deard
Jun-2001		James Book	\$100,000	0%	DISCUSS	John Deard	John Deard
Jun-2001		Telecom Software	\$100,000	0%	DISCUSS	John Deard	John Deard
Jun-2001		Telecom Software	\$700,000	15%	DISCUSS	John Deard	John Deard
Jun-2001		James Book	\$100,000	0%	DISCUSS	John Deard	John Deard
Page Total			\$12,115,000.00				
Grand Total			\$4,130,000.00				

Page Results: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21

To use this feature: On the Information Center, click on the Express Forecast Update hyperlink. Enter any changes you wish to make in any editable fields for one or more leads currently displayed on your screen. Click Submit. If you have more than one page of leads in the Express Forecast Update, continue scrolling through the pages, making changes to as many leads as desired on a particular page and then clicking Submit. If you make changes on an Express Forecast Update page and then click on the forward or back page counter, the system will prompt you to save or cancel your changes on the current page before proceeding.

Note: This feature is not available to Global Users through the Information Center. If you are a Global User, you can generate a customized Forecast Update by going to Search, specifying search parameters and clicking Go. From Search Results, click Report Filter and select Forecast Update from the drop-down list.

Data Mining

Search by Date Contacted: Users with Power Search capabilities now have the ability to search by a particular date or range of dates using the Date Contacted fields. This allows users to perform data mining for the actual date that a record in the database was contacted. Many users populate this field with data directly from third party vendors, such as telemarketing firms, who are contacting customers and prospects on their behalf.

To use this feature: In the CRM Management section of the Search screen, enter the desired date in the Contacted Date field and choose the appropriate =, < or > operators. You can also enter a specific date range in the Contacted Date Range fields.

Download Archive Search: Users with access to the database Archives can now download search results.

To use this feature: Simply perform an Archives Search and use the Download Search or Download Mailing List functions just as you would in the main database. Keep in mind that you can customize the fields you wish to be included in the download, including both standard and custom fields. The latter is applicable only to the Download Search function.

Search Unnamed Campaigns: On occasion, records may be entered into the database with a Campaign Code that does not correspond to an existing Campaign in the database. In these cases, the Campaign Code displays with the prefix "ID=" Users can now search on records with non-standard campaign codes.

To use this feature: Select "Leads with no campaign" in the Campaign field drop-down list on the Search screen and click Go.

User Settings

All users now have the power to customize their default view of a record to best suit their needs. The system default is set such that when viewing any Search Results screen, clicking on the Company name hyperlink takes the user to the Profile page for that record. However, some users, such as sales reps using the system to enter updates on their leads, may prefer to launch to the Sales Update screen first so that they can enter critical new data more quickly. No matter which screen is set as the default view, the other page views are always available through the orange buttons above the record.

To use this feature: Click on User Settings at the top of any page to launch your individual user profile. To change your preference for the page that will display first when clicking the Company Name hyperlink from the Search Results select the radio button for your preference and then press Submit.

User Profile: Carolyn Evans

Company	ABC Company	Address 1	123456 Street
Title	Finance Dept	Address 2	PO Box 123
Phone	(0045) 123 456	City	London
Fax	(0045) 123 456	State/Prov	London
Mobile	(0045) 987 654	Zip/Postal Code	1001
Email	carolyn@abc.com	Country	UNITED KINGDOM
Home Password			
Work Password			
Default Page:	<input type="radio"/> Profile <input type="radio"/> Sales Update <input type="radio"/> Sales Info		

Profile
 Sales Update
 Sales Info