



Figure 3: Assign Campaign Tab on Search Results Screen

Note on access privileges: Only users with Access to Campaigns have access to this feature.

The Campaign field has been modified to allow the campaign assignment for database records to be changed. Users with the Access to Campaigns privilege turned on can change the Campaign assignment of a record from either the Edit Profile screen (for an individual record) or the Search Results screen (for single or multiple records). An audit trail of all Campaign changes to a record is created in the system by placing a date/time stamp in the Sales Rep Comments area along with the user name for the person who entered the campaign change and the name of the previous and current campaign. If comments associated with the campaign assignment are entered by the user, these are displayed beginning on the second line of the time-stamped entry (see Figure 1).



Figure 1: Entry Added to Sales Comments to Record Campaign Change

To change the Campaign Assignment for a Record from the Edit Profile screen: On the Edit Profile screen for the record, select the new Campaign to which you would like to assign the record from the Campaign drop-down list (see Figure 2) displayed in the Profile Summary section. Press the Go button to save the change. The system will prompt you to include comments with the assignment which will appear in the



Figure 2: Campaign Drop-Down List on Edit Profile Screen

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A number of features have been added to the online application to provide advanced functionality and streamline certain functions for the user. Please review the information below to familiarize yourself with these enhancements.

Change and Assign Campaign



Figure 3: Assign Campaign Tab on Search Results Screen



Figure 4: Assign Campaign Pop-Up Window

Sales Rep Comments area of the record. Select Yes or No. If you choose Yes, enter your comments and click Submit. Clicking Cancel will save the assignment without any comments.

To change the Campaign Assignment from the Search Results screen: On the Search Results screen, select the record(s) for which you would like to change the Campaign assignment by clicking on the checkbox for the record(s). Once the records are selected, click on the gray tab marked “Assign Campaign” above the Search Results (see Figure 3).

In the pop-up window (see Figure 4), choose the Campaign in the drop-down list and click Submit. The system will prompt you as to whether you wish to

include comments with the assignment. These comments will appear in the Sales Rep Comments area of the record. Select Yes or No. If you choose Yes, enter your comments in the text entry box and click Submit to save the assignment and comments. Clicking Cancel will save the assignment without any comments. Note that you can also perform a search for a record set and use the Assign Campaign gray tab function to change the Campaign for all records in your result set by selecting the “all records in search results” radio button in the Assign Campaign pop-up window.

Setting Required Fields for Manual Record Entry

Note on access privileges: In order to gain access to this administrative function, the user must have the appropriate advanced administrative privilege added to their logon. If you require access to this feature, please contact your account manager.

Authorized administrative users can now define the key fields which are required for all records entered manually into a company database. Note that these settings apply to all records that are entered manually into the company database in question.

To define which fields are required: On any page, click on Administration in the top navigation bar. Click on the “Set Required Fields for New Leads” option. In the Selected Required Fields window, select or deselect the field (s) that you wish to make required for records entered manually into the system (see Figure 5). Press Submit to save the changes.



Figure 5: Set Required Fields Administrator Interface

Search Results Page Navigation

Note on access privileges: Individual user security permissions control access to the assignment, archive and delete functions; only those users with access to a given function will see the relevant tab displayed.

The functions accessed through the gray tabs on the Search Results screen (see **Figure 6**) have been streamlined so that users can access the specific function they need more quickly.

Selecting records



In addition to the Select Page and Clear Page hyperlinks that appear at the bottom of the Search Results, users can now use the gray tabs for these functions in the gray bar above the Search Results.

To select records: To place a checkmark to the left of all the records on the current page, simply click the Select Page tab. To deselect all records, click the Clear Page tab. Selecting records is used to denote records to which you wish to send an email message from your local email client, assign to a user(s), assign to a campaign, archive or delete.

Figure 6: Search Results Screen with Gray Tab Functions

About the functions

In addition to the Select Page and Clear Page tabs, the functions available as gray tabs on the Search Results screen include:

- **Send Email:** creates a new email message in the client's local email client with the email addresses for the contact(s) in the record(s). The user may choose to include secondary contacts in the email distribution.
- **Assign Records:** allows users with Lead Assignment permissions to assign the record(s) to an account manager and/or partner rep.
- **Assign Campaign:** allows users with Access to Campaign privileges to assign the record(s) to a campaign.
- **Archive:** allows authorized users to place the record(s) in the company archive.
- **Delete:** allows authorized users to delete the record(s) from the company database.

Using the gray tab functions: Once you have selected the records you wish to work with, click the relevant gray tab for the function you wish to perform. Alternately, if you wish to apply the function to all records in your search results, you can simply click the relevant gray tab and then select the "all search results" radio button in the pop-up window (refer to **Figure 4** above to view the Assign Campaign pop-up).

Customizable Look for Event Tracker

Note on access privileges: Only users with Edit Message Board privileges have access to this feature.

Administrative users can now customize the colors used in the Event Tracker that appears on the Message Board. Custom background and font colors can be chosen for both the header section and the main body for each individual event. Spell check capabilities for the body text for each event has also been added.

To edit colors for the Event Tracker: On any page, click the Home navigation button to return to the Information Board. Click on the orange Update Board tab to display a list of all message boards for the company database as well as all events associated with each message board (see Figure 7).

Click on the name of the event that you wish to edit to launch the Edit interface for that event. In the Edit window, select the desired colors for the heading background, the heading text, the body background and the body text (see Figure 8). For each component, you can enter

the HTML color code or a basic color name (e.g. black, white) or click on the “color palette” to open a pop-up window displaying the available colors. To select a color in the palette, simply click on the color box for the color you wish to use. After you are finished selecting the colors, press Submit to enter the changes. If you have entered text changes, the system will launch the spell-check window upon submission. To turn the spell-check function on or off, click on the Spell button to toggle between the on and off positions.

To preview the Event Tracker: to preview the Event Tracker for a particular message board, click on the Preview Event(s) hyperlink on the Information Board List (see Figure 7).



Figure 7: Information Board List Displaying Information Board and Events



Figure 8: Edit Event Interface