ContactTracking.com
AFFORDABLE CRM SOFTWARE SOLUTIONS

New Features Overview

For Users

Product News

14 March 2002

The Search Results page has been modified to streamline certain functions by combining the "Selected" and "All" options for each task into a single button. Please review the information below to familiarize yourself with these changes.

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 1**) have been streamlined so that users can access the specific function they need more quickly.

<u>Selecting records</u>

Figure 1: Search Results Screen with Gray Tab Functions

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.

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 2** to view the Assign Campaign pop-up).

Figure 2: Assign Campaign Pop-Up Window