ContactTracking.com
AFFORDABLE CRM SOFTWARE SOLUTIONS

New Features Overview

For Users

Product News

24 April 2002

A few new features have been added to the online application. Please review the information below to familiarize yourself with these enhancements.

New Format for Editing Special Interest Fields

When using the Edit Profile or Add Record functions, the drop-down boxes in the Special Interest areas have been replaced by individual edit functions for each in order to accommodate fields defined by your Administrator to allow for multiple selections in a single field.

To add or edit Special Interest values: Special Interest values can be defined on the Add Record Screen or edited on the Edit Profile screen (**see Figure 1**). On either screen, click the orange Edit button for to the right of a special interest field to open a pop-up window displaying the current value(s) entered for that field. Note that the orange Edit button is only displayed if there are values available for the field (for an example, see Interest 6 in **Figure 1**).

Figure 1: Special Interest Fields with Edit Button Displayed

Making the selection: If your Administrator has defined the field as **multiple select**, the available selections will appear in the pop-up window with checkboxes to the left (see **Figure 2**). To select or deselect a value, click in the checkbox for that value. If the Administrator has defined the field as **single select**, the available responses will be displayed with radio buttons to the left (see **Figure 3**). To select a value, click the radio button to the left of the value. To leave the field blank, click the "(none)" button.

Submitting the record: To enter the changes to the selection(s) in the pop-up window, click Submit. This will update the main Edit Profile or Add Record page with your selections but you must then **press the green Go button to submit the changes to the record.**

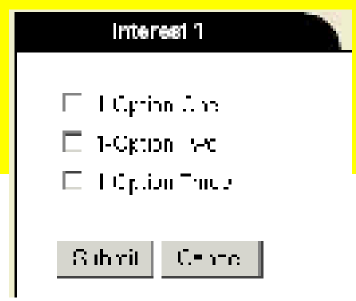

Figure 2: Edit Special Interest Field Pop-up Window with Multiple Select

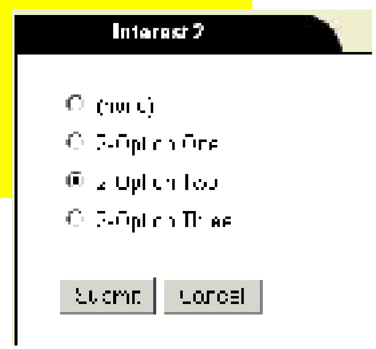

Figure 3: Edit Special Interest Field Pop-up Window with Single Select

Note on access privileges: This feature applies only to users with **Edit** and/or **Add Record** privileges.

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.

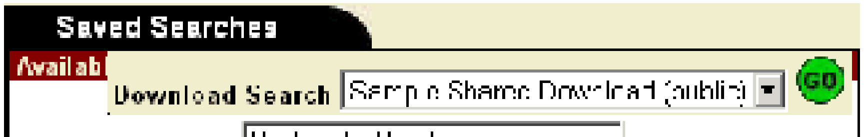

Figure 6: Sample View of Public Download in Template List

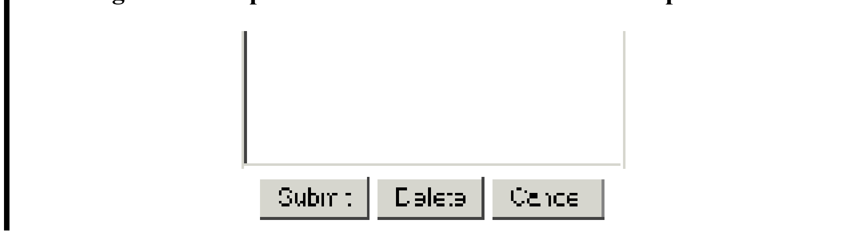

Figure 5: Saved Searches List with Public Search Template

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.

Note on access privileges: This feature applies only to users with **Download** and/or **Report** privileges.

Set Personalized Default Setting for Spell Check

You can now set the default setting for the spell check feature to On or Off through the User Settings panel of the application. This setting applies only to your own personal user logon. 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 4**). This setting will be effective immediately and will remain in place until you should choose to change it again.

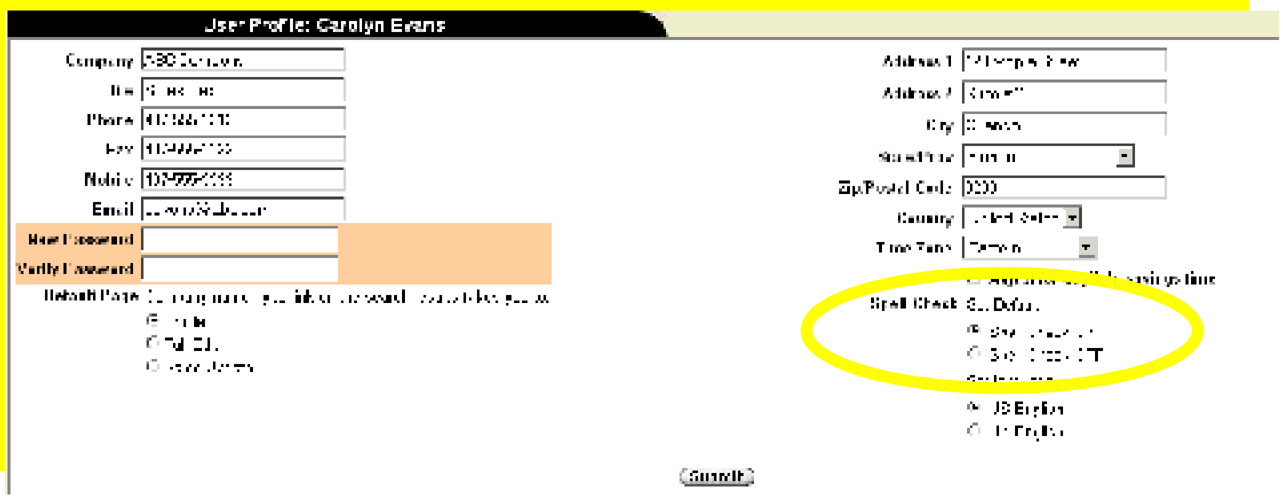

Figure 4: Setting Spell Check Default in User Settings

Public Download Templates and Saved Searches

Your company Administrator can create and maintain public Saved Search and Download templates to share among all authorized users in your organization. If a public template has been created, it will appear in your "My Searches" list (**see Figure 5**) accessed from the main search page or the Download template list (**see Figure 6**) located on the Search Results page. All shared templates are denoted by the term "(public)" at the end of the template name. Public templates can be used just like any other template that you create but can only be maintained by the Administrative user who created it.

Note on access privileges: Only selected Administrative users can create, edit and delete public templates. Public search templates can be viewed and used by all users in the organization; public download templates are accessible only by those users with Download privileges.