ContactTracking.com
AFFORDABLE CRM SOFTWARE SOLUTIONS

New Features Overview

For Users

Product News

5 September 2002

A number of features have been added to the online application to provide both new functionality and improved navigation. Please review the information below to familiarize yourself with these enhancements.

Contacts

Note on access privileges: Only users with Full Edit or Edit Contacts privileges have access to functions related to the editing of contacts. Users without these permissions will not see the buttons described below (such as the Submit, Update, Delete or Change to Primary) or the Add Contact tab displayed on their screen.

Contacts Notes Field

A new Notes field has been added for each contact associated with a record. This field appears in the detailed contact area for the individual and may be useful for storing information specific to that person. This free text field supplements the existing Sales Comments/Notes text field, which may be appropriate for tracking information of a more general nature that relates to the record as a whole. For advanced users, the new Notes field is included when cloning a record and is also available for download and import.

To add or edit Notes for a Contact: In the Contacts section of the Profile, Edit Profile or Sales Update screen, click on the name of the person for whom you wish to add or edit the contact Notes. In the detailed contact window, enter or edit the comments in the Notes field at the bottom of the pop-up window (see **Figure 1**). Click Submit to save these changes to the contact. To close the window without making any changes, click Cancel.

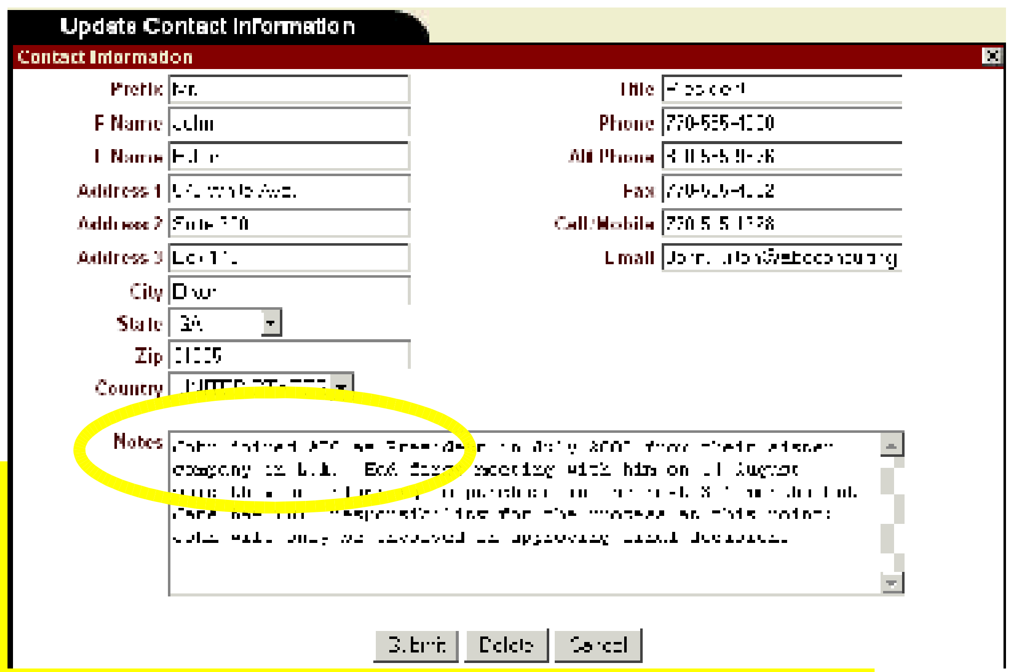

Figure 1: New Notes Field on Contact Detail Screen

Adding a New Contact to a Record

When adding an additional contact to an existing record, you can auto-fill the address information with the address listed for the primary contact to reduce data entry time.

To auto-fill address for a Contact: On the Profile, Edit Profile or Sales Update screen, click on the gray Add Contact tab to add a new contact. In the Add New Contact pop-up window, click on the "Use primary contact address" checkbox to auto-fill the address fields (see **Figure 2**). To clear all of the address fields, click on the checkbox again to remove the checkmark. Make any necessary changes and additions to the screen and then click Submit to save the new contact record. To close the window without saving the new contact record, click Cancel.

When adding a new contact, you may also choose to designate the individual whom you are adding as the Primary Contact for the record. The Primary Contact name and contact information is listed in the upper section of the record profile as well as being included in the Contacts area. Doing so will move the existing primary contact down to the additional contacts area, but all information for that contact will be maintained.

To designate a new Contact as Primary: In the Add New Contact pop-up window, enter all details for the new contact and then click the orange Change to Primary Contact tab at the top of the window (see **Figure 2**). The system will prompt you to confirm that you wish to designate this new contact as the primary contact for the record. To confirm and proceed, click Yes. To return to the Add New Contact window, click No.

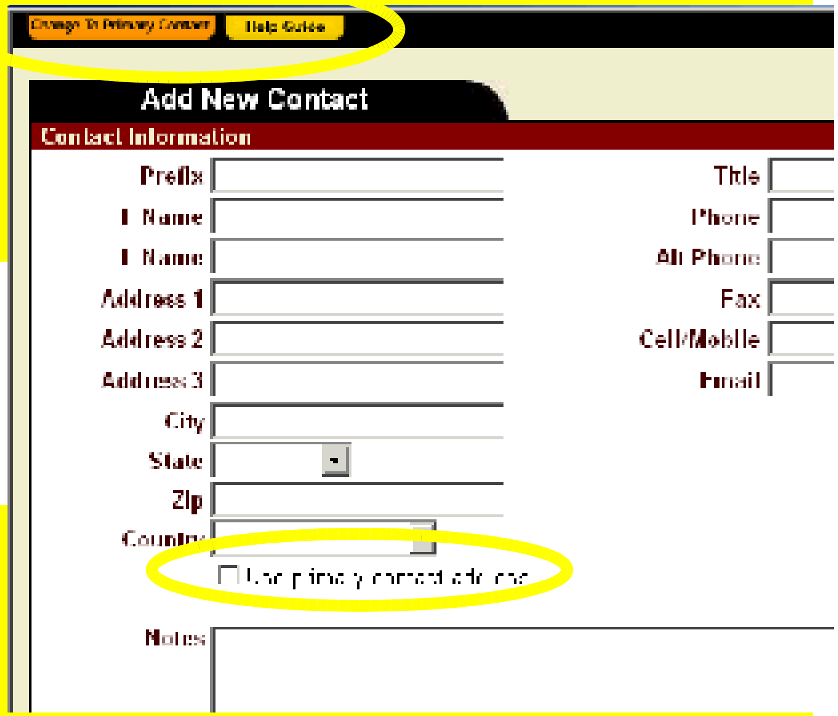

Figure 2: Add New Contact Window With Auto-Fill Address and Primary Contact Capabilities

Designating an Existing Contact as Primary

You can also move an existing additional contact listed for a record to the Primary position by using the same Change to Primary Contact orange tab described above from the Edit Contact pop-up screen.

Adding New Records

Note on access privileges: Only users with security permission to add new records to the database have access to the import vCard and manual add record functions described below.

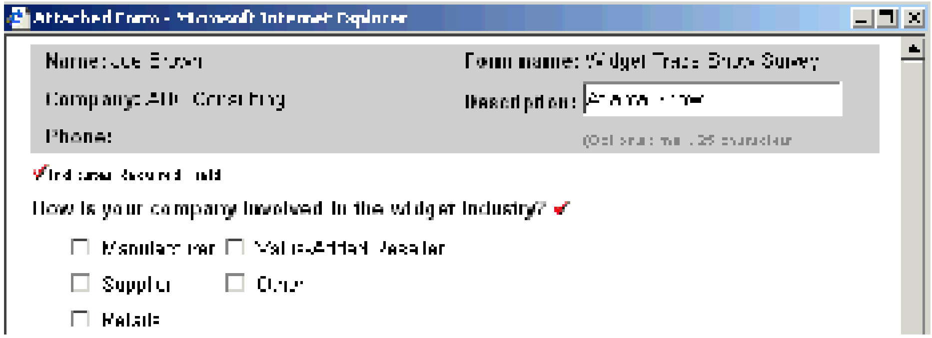

Figure 3: New Header on Custom Form Pop-Up Window

Import vCard

In addition to the existing functions that allow you to save contacts and callbacks in your online database to your personal information manager (PIM), such as Outlook, the system now supports import of vCards. The vCard wizard allows you to upload a single contact saved in the vCard (.vcf) file format and then translates the data, mapping the basic contact fields into a new record in your database.

Before you begin: Before starting the import vCard process, ensure that your vCard(s) are ready for import. If you have received the vCard as an attachment to an email message, follow the instructions for your mail application and save the attachment to your computer or network, ensuring that the file is saved in the .vcf file format and making a note of where you have saved it. In most mail programs, such as Outlook, you can right click on the vCard attachment to save it. Alternately, if your PIM software allows you to save a Contact as a vCard, you can create a vCard for any Contact. In Outlook, open a Contact folder and click to select the contact for which you want to create a vCard. On the File menu, choose Save As and in the "Save file as type" list, click to select the vCard Files (*.vcf) file format. In the Save In list, select the folder where you want to save the vCard file, and then click Save. In some versions of Outlook, you can choose Export to vCard from the File menu once you have opened the contact. Please refer to the documentation for your email or PIM software for additional details on how to save a vCard.

> **To import a vCard Contact:** To import a vCard into the database, click on Add New Records at the top of any page and click on the hyperlink labeled Import vCard to launch the vCard import process. Follow the steps in the wizard to browse for the vCard file on your computer or network. The wizard will also prompt you as to whether you wish to select a campaign and/or assign the record. At any time during the vCard import process, you can click Cancel to halt the import process and return to the Add New Records page. You can also use the Back button to move back a step in the process.

Additional Contacts for New Records

When you add a new record to the database by entering it manually into the system, you can now add as many additional contacts as necessary to the record during the data entry process.

> **To add Contacts to a new record:** To add a new record manually, click on Add New Records at the top of any page and click on the Add New Record hyperlink. In the Add New Record window, enter all relevant data for the new record, including details for the primary contact for the record. Press Go to go to the next step. The system will prompt you as to whether you wish to add additional contacts to the record; click Yes to add more contacts. Enter all the details for the additional contact you wish to add. To save this contact and add another, click the Save and Add Another Button. If this is the last contact you wish to add, press Save. To save the new record without adding another contact, press Cancel.

Custom Forms

Note on access privileges: All users can see custom forms attached to a record but only users with appropriate security access can edit data collected in the custom form or edit the form description field.

When clicking on the name of a Custom form attached to a record, the pop-up window now contains a header section to better identify the record with which the form is associated (see **Figure 3**).

Custom Form Description Field

The new custom form header section includes a new text field called Description, which can be used to enter a record-specific description for the form. This optional Description field is also displayed where an attached form appears in the list of Custom Forms on the Profile, Edit Profile and Sales Update screens (see **Figure 4**).

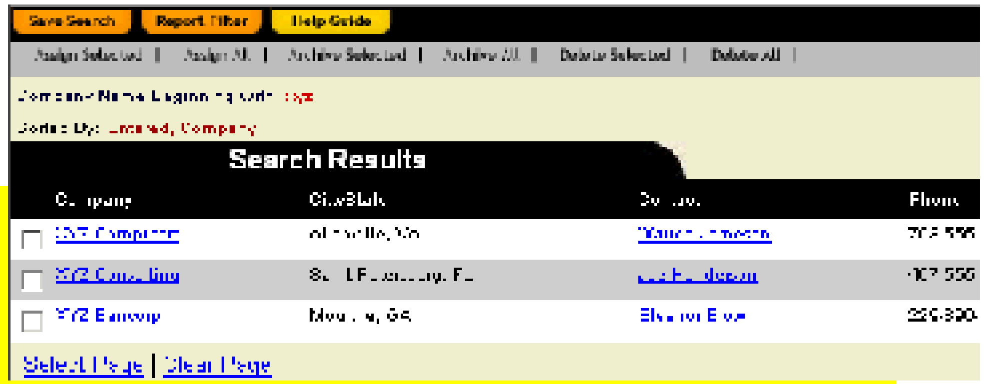

Figure 6: Search Results Page with Gray Navigation Tabs and Select/Clear Page Hyperlinks

To add a Description to a Custom Form attached to a record: Click on the name of the attached form on the Profile, Edit Profile or Sales Update Screen to open the form detail. In the gray header section of the form pop-up window, type the text you wish to enter in the Description text field. Click the Update button at the bottom of the form to save the Description as well as any other changes you may have entered on the form. Use this same process to edit an existing Description that has been entered for a custom form.

Figure 4: Custom Form List, Including Description Field, on Profile Screen

To add a Description when attaching a new Custom Form: To attach a copy of a custom form to a record, click on the gray Attach Form tab near the top of the screen. Choose the desired form from the drop-down box. If you wish to enter a Description, type it into the Description text field (see **Figure 5**). Press Submit to save the copy of the form.

Figure 5: Add Custom Form Window with Description Field

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.

Gray tabs have replaced text hyperlinks for the Assignment, Archive and Delete functions available on the Search Results page to allow for more intuitive navigation. Gray tabs for those functions to which you have access appear above the search results (see **Figure 6**).

Functions that refer to "selected" records will apply to all records on the current page for which you have added a checkmark in the far left-hand column. All records on the current page can be selected by clicking on the Select Page hyperlink directly under the last record on the current page. Functions that refer to "all" records will apply to all records in the current search results set, not just those displayed on the current page.

Directly underneath the last record on the current page of search results, a Clear Page hyperlink has also been added alongside the Select Page hyperlink. Clicking the Clear Page hyperlink will clear any checkmarks you have added on the current page to select individual records.