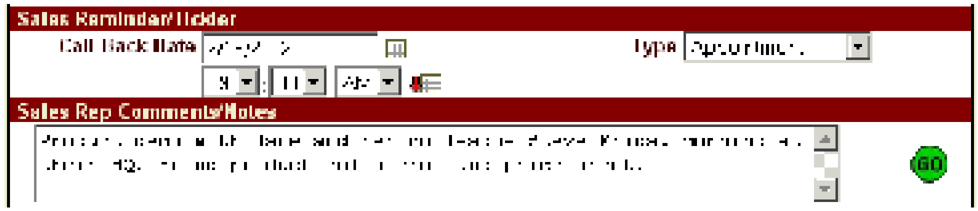
New Features Overview

For Users

Product News

7 February 2002

On Monday, 11 February 2002, you will notice a few helpful new features in the application, as well as an updated look to the navigation tabs and buttons used to move from place to place within your online database. A brief overview of the new enhancements is provided below.



Save Contacts and Call Back Appointments to Microsoft Outlook

The system now provides users with the ability to save contacts and call backs to their personal scheduler, such as Microsoft Outlook or any other personal information manager (PIM) compatible with the vCard and vCalendar file standards.

Add Contact: Available as a clickable icon on the Profile screen for all contacts, including both primary and additional contacts as well on the Sales Update screen for the primary contact for the record (see Figure 1).

> **To add a contact:** To add a contact to Outlook (or another vCard-compatible contact management program on your computer), click the Add Contact icon next to any of the contacts listed on the Profile screen for the record. Clicking this icon will launch the contact software program and allow you to save the basic contact information for that person to your personal scheduling program. You can also save the primary contact to your local contact software in this way from the Sales Update screen.

Primary Contact: The yellow key icon is used to identify the primary contact in the Contacts list on the Profile screen. In addition to being listed in the top demographic section of the profile, the primary contact for the record is now also listed as the first contact in the Contacts section, followed by all additional contacts associated with the record, listed in alphabetical order.

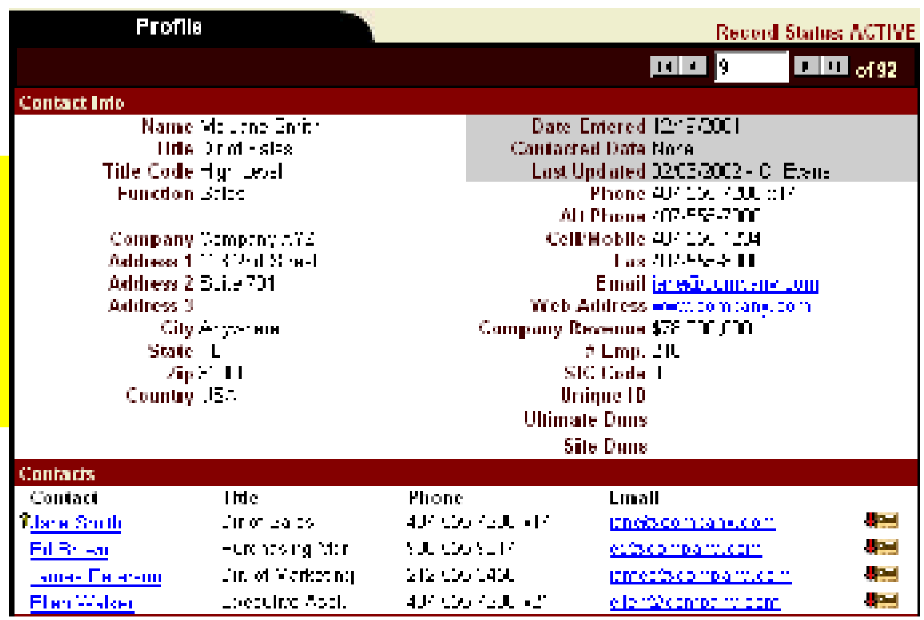


Figure 1: Contact Section of Profile Screen with "Add Contact" Icons

Add Call Back: Available as a clickable icon in the Call Back section of the Sales Update screen (see Figure 2).

To add a call back: To add a call back to Outlook (or another vCalendar-compatible scheduling program on your computer), click the Add Call Back icon that appears next to the call back time on the Sales Update screen for the record. Clicking this icon will launch the scheduling software program on your computer and allow you save the appointment information entered for this record, including the date, time and type of call back as well as the last Sales Comment entered. If you have not entered a date or time for the call back in the online application before clicking the Add Call Back, the system will prompt you to do so before proceeding.

Figure 4: Sample of New Navigation Appearance – Profile Screen

Technical notes: If a compatible default personal scheduling application (such as Outlook) is not set up on your local system, when you click the icon to add a contact or call back to your personal scheduling program, the system will simply prompt you to save the file in a vCard (.vcf) or vCalendar (.vcs) format. These files can then be imported into any software program compatible with vCard and/or vCalendar file formats using that program's import function. Also, keep in mind that after you click on the add contact or add call back icon and the window in your local system's scheduling program opens, changes made to the contact or appointment record in that outside software application are not automatically reflected in the corresponding online database record.

Figure 2: Call Back Section of Sales Update Screen with "Add Call Back" Icon

Set Your Time Zone

To ensure that your call back appointments are entered into your personal scheduling software correctly when using the save call back feature, you will need to set your time zone in the online database. You will be automatically prompted to set this new feature when you log in.

To set your time zone upon initial login: A pop-up box will appear when you log into the system for the first time after this enhancement is instituted (see Figure 3). Simply select your time zone from the drop-down list and in the checkbox area below, check whether or not your region observes daylight savings time. Then press Submit. Once you have submitted this information, your time zone will be set for your personal logon profile.

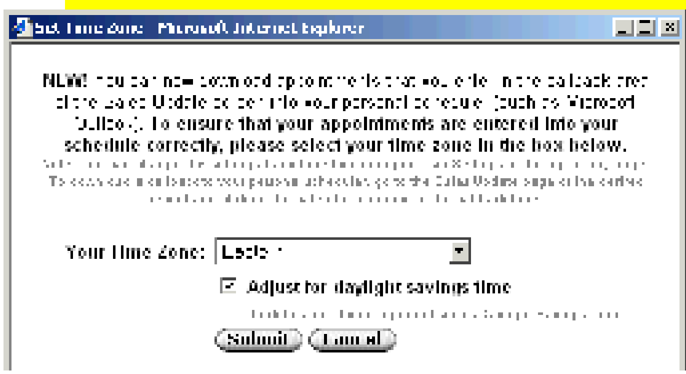


Figure 3: Set Time Zone Window Upon Initial Logon

To change your time zone: If you need to change your time zone setting, simply click on User Settings at the top of any page in the online application. In the lower right corner, select the proper time zone parameters and click Submit.

Improved Navigation

In order to make your navigation through the online application even easier, we have changed the look and placement of some of the tabs and buttons used to move around the database. Some of the highlights of these changes include:

- **Color-coded tabs and buttons:** In order to provide quick differentiation of navigation options for the current screen, the navigation items directly above the record are now presented with color-coding according to function (see Figure 4). The orange tabs direct you to a new functional area within the application. For example, after viewing the profile, you may wish to click on Sales Update to provide new data and feedback on the record. When viewing the Profile, Sales Update or Edit Profile screen, the orange coloring on the tab for the current screen will be disabled to help indicate your current location within the application. The clickable buttons in the gray navigation bar allow you to access functions for viewing or modifying data on the current screen, such as record assignment or cloning. Only those functions relevant to the current page will be displayed.

- **Streamlined access to key functions:** You will note that some of the items that previously appeared as hyperlinks in the Profile, Edit Profile and Sales Update screens (including Assign Record, Clone, Attach Form and Return Record functions) have been incorporated into the gray navigation area directly above the record data. Although these functions are now accessed in a new way, you can continue to use these functions exactly as you did as before.
- **Quick buttons:** Clickable "Add" buttons have been introduced into the Contacts and Custom Forms sections of the Profile so that you can quickly add a new contact or attach a custom form directly from that area of the screen. Simply click on the green Add icon to launch the Add Contact or Add Custom Form interface. These functions can also be accessed from the gray navigation bar described above.

Note on access privileges: Your access to certain features and functions is determined by your security profile (set by your Administrator). Depending on your access privileges, you may find that some of the navigation options described above are not displayed in your system. If you have any questions about your security privileges, please contact your Administrator.