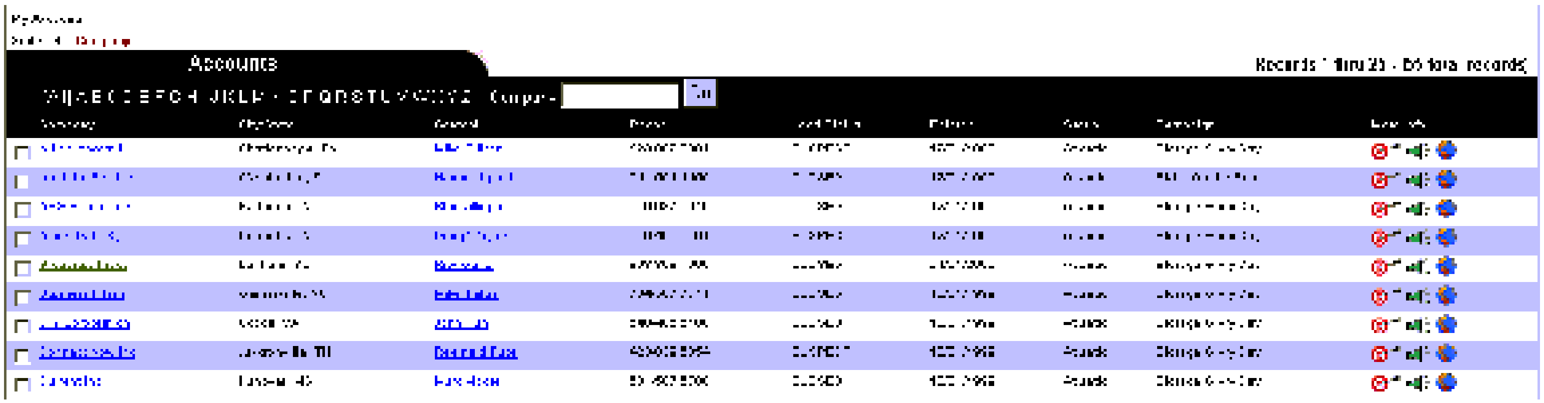
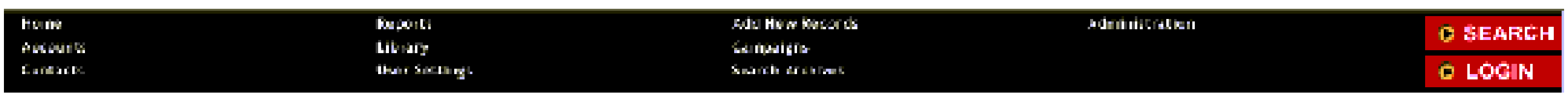
ContactTracking.com
AFFORDABLE CRM SOFTWARE SOLUTIONS

New Features Overview

For Administrators



Product News



20 September 2001

On Monday 24 September 2001, you and your users will notice that our application has a new look as well as a number of new functionality offerings. A brief overview of the new elements being introduced is provided below.

Navigation

The main navigation bar (at the top of every screen) has changed to accommodate some new additions to the system and also to enhance the user experience. The graphic below displays the new navigation bar for an administrator-level user; your users' security access privileges may differ. Users see navigation buttons only to those functions to which they have access.

Three new buttons have been added**: Accounts, Contacts and Reports**. The usage of each is described in detail in the sections below.

Two other buttons have been renamed but retain the same functionality. These include:

Figure 1: New Navigation Bar for Typical Administrator-Level User

- **Home** (was Information Center): The function of this page as the "starting point" for all users remains the same, but it has been renamed "Home" to ensure that all users quickly identify this as their landing page, which contains valuable information on new and reassigned leads, callbacks, important dates, campaign and company updates and much more.

- **Add New Records** (was Data Administration): Again, the functionality remains the same but the newly renamed "Add New Records" will be instantly recognizable to users as the place to go to manually add new records, import records, view imported records or manage import templates – depending on their security access privileges.

Accounts

The new Accounts button offers users an easy way to quickly review the Companies associated with all records to which they have access and perform simple searches by Company name.

To review Accounts: Click on Accounts from the top navigation bar on any page. This displays all records to which you have access in alphabetical order by Company. To see all Accounts beginning with a specific letter, simply click on that letter in the alphabet bar above the results. To return to the full results, click on All. To search for a Company, enter the full or partial name in the Company search box to the right of the alphabet bar and then click "Go."

What Accounts does a User see? The user sees only those Accounts to which they have access. This may be controlled by record assignment and overall security level as well as by other security parameters set by an Administrator such as campaign-level and

Figure 2: Reviewing Accounts

geographic controls.

Contacts

The new Contacts button immediately creates a list of all of the primary Contacts for all records to which the user has access. Like the Accounts function, users can perform simple searches by Contact name.

To review Contacts: Click on Contacts from the top navigation bar on any page. This displays all records to which you have access in alphabetical order by Contact Last Name. To see all Contacts with last name beginning with a specific letter, simply click on that letter in the alphabet bar above the results. To return to the full results, click on All. To search for a specific Contact, enter the full or partial last name in the Contact search box to the right of the alphabet bar and then click "Go."

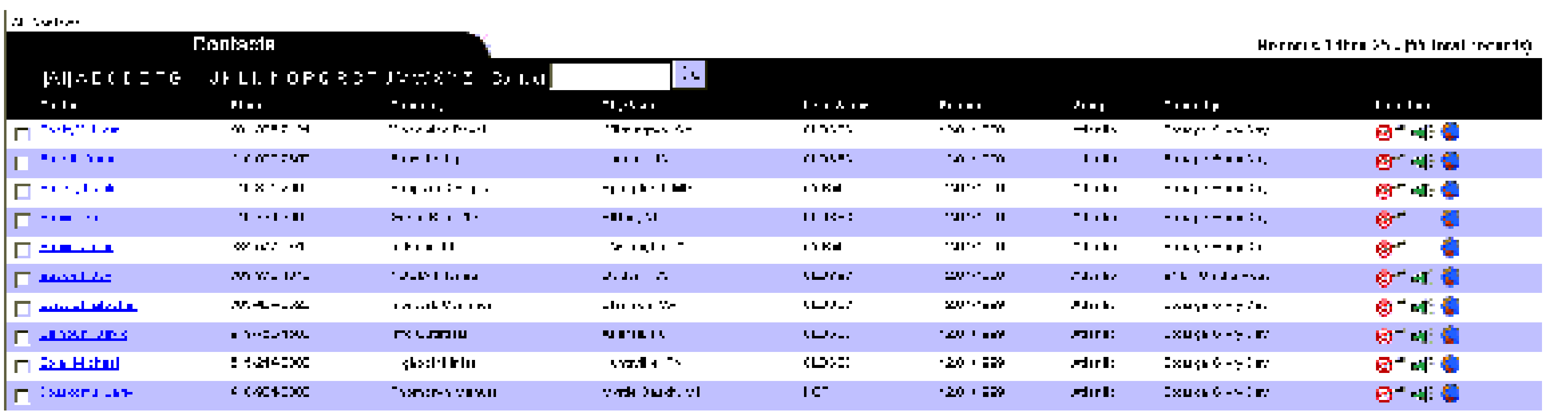


Figure 3: Reviewing Contacts

What Contacts does a User see? The user sees only those Contacts associated with the records to which they have access. This may be controlled by record assignment and security level as well as by other parameters such as campaign-level and geographic controls.

Reports

The Reports button has been added to the navigation to provide users with a shortcut for running industry standard reports on all records to which they have access.

To access Reports: Click on Reports from the top navigation bar on any page. Choose the report type, type a name for the report (optional) and indicate sort parameters (optional) and then click “Go.” After running the Report, the user has access to the standard Report functions, depending on their security privileges. Options include customize download, download file, download mailing list and print /email. Additional details on these functions are available in the Quick Reference Guide and through Online Help within the application.

Narrowing results for reporting: It is important to note that the Reports shortcut button by default runs the selected report for all records to which the user has access. To narrow the results, employ the Report Filter by clicking on the red Search button in the top right corner of any screen. Select the desired parameters to narrow the results, then click “Go.” On the Search Results page, the user can access the same reports offered through the Reports shortcut by clicking on the Report Filter tab above the Search Results.

Which Users will have access to the Reports button? The Reports button will only be displayed in the top navigation bar for those uses with access to the existing Report Filter turned on in their security profile.

Library

The application now offers an online library feature for posting sales and marketing collateral, company announcements and more. Users with full access to Library functions can upload files (see note below on file types), delete files, add and delete folders and sub-folders, rename folders and documents and move folders and files.

To use the Library: The Library works much like a Windows-based file directory. To begin, click on Library from the top navigation bar on any page. The left-hand pane contains all folders available to Library users for your company database. To access the contents of a folder or sub-folder, simply click on that folder in the left-hand pane; the contents will display in the right-hand pane. To access a document, simply click on the file name in the right-hand pane to launch the document. To add a new document, click on the Upload File button in the gray bar. The system will prompt you to locate the desired document on your computer or network. Clicking on New Folder allows you to add and name new folders or sub-folders. To rename, move or delete a document or folder, click the checkbox next to the document or folder and then click the desired button in the gray bar.

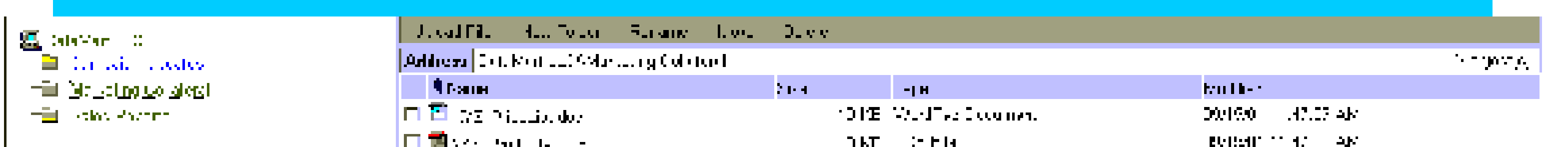
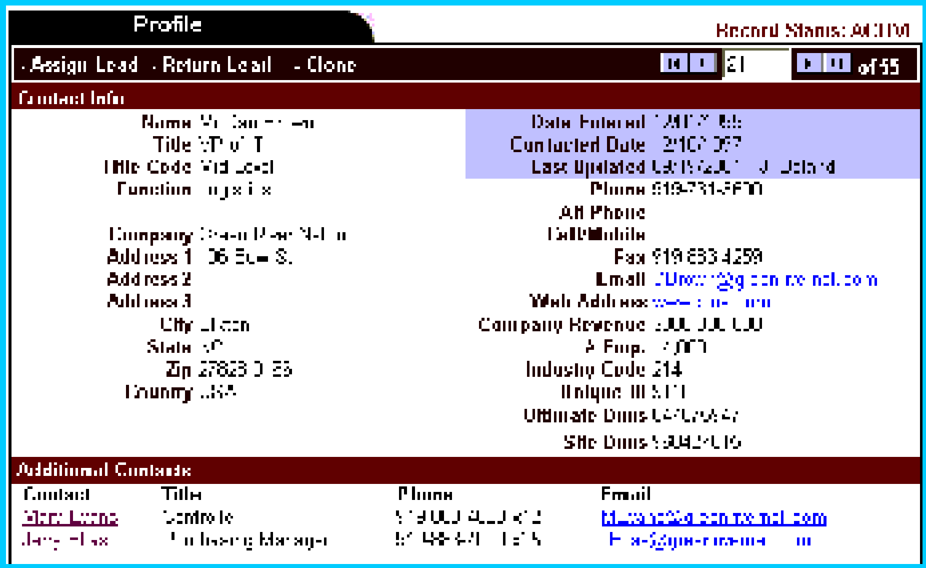


Figure 4: New Library Interface

For Administrators: What You Need to Know About Library Security

Who sees the documents posted in the Library for my company database? All users with View Library privileges turned on in their security profile (see below) can see <u>**all**</u> documents posted in any of the folders in your Library.

What security controls exist for the Library? The system provides flexible security parameters for Library access that can be set for each individual user. The four privileges relating to Library access are as follows: View Library, Upload Files to Library, Rename Files in Library, Delete Files in Library.



How can User privileges relating to the Library be controlled?

- ***No access:*** Access to the library can be turned on and off for each user by setting the "View Library" privilege. Without the "View Library" privilege turned on, a user will not see the Library button in the top navigation, nor will they be able to access the Library or any documents therein.
- ***Read-only access:*** Users can be given read-only access by turning "View Library" on but ensuring that none of the other three Library security parameters are engaged.
- ***Advanced access:*** Advanced users can be given upload and/or rename and/or delete privileges. Each of these three parameters can be turned on or off independently.

How does the Administrator set up Library privileges for end-users? By default, all Library permissions will be turned off for all users when the Library function is launched. Over the coming week, your account manager will contact you to discuss the operation of the Library, answering any questions you may have and working with you to determine the optimal Library security set-up for your company database and end-users. In the meantime, if you have any questions, please do not hesitate to contact the account manager listed at the end of this document.

What kind of documents can be posted to the library? By default, the system allows users with Library Upload privileges to add files with the following extensions: .txt, .csv, .pdf, .gif, .wri, .xls, .htm, .jpg, .rtf, .doc, .bmp and .dat If you would like to remove permission to add certain document types or add permission for additional document types, please contact us.

Additional Contacts

The Profile screen has been revised to display key detail on additional contacts for that record. All additional contacts associated with a record are listed in the section immediately after the contact information for the primary contact. The main Profile screen displays the name, title, phone and email for each additional contact.

To review, edit and add additional contacts: To review or edit the full profile of an additional contact, click on the hyperlink for their name to launch a pop-up box with full details for all contacts. Make any necessary changes and then click "Go." From this pop-up box you can also add new additional contacts. Alternately, you can click on the orange Add Contacts tab at the top of the main Profile screen to access this information.

Additional Information

A separate document designed for distribution to end-users will be provided under separate cover. This document will provide a basic overview of the enhancements as they affect the general user. This document will also be made available to users when they log into the system. A pop-up box will inform the user that some changes have taken place in the system and will offer the user the opportunity to download the aforementioned product update document. For those Administrators who wish to enable the Library function, stand-alone documentation describing the Library to the end-user will be available.

Questions?

We look forward to a smooth transition and hope that you and your end-users find the improved navigation and new features to be helpful improvements to the overall system. If you have any questions or concerns about the enhancements, please do not hesitate to contact your Account Manager, listed below:

Contact:
Name
Tel:
Email:

Figure 5: Accessing Additional Contacts