New Features Overview
For Users

Product News
20 September 2001

On Monday 24 September 2001, you 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.

Note: 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 options below are not displayed. If you have any questions about your security privileges, please contact your Administrator.

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 reflects the look of the new navigation bar for a typical user; your specific security access privileges may differ. You will see navigation buttons only to those functions to which you have access.

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

Figure 1: New Navigation Bar

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

- **Home** (was Information Center): The function of this page as your "starting point" remains the same, but it has been renamed "Home" to ensure that it is quickly identifiable as your landing page. This area 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 you as the place to go to manually add new records, import records, view imported records or manage import templates if your security profile allows you to access these areas.

Accounts

The new Accounts button offers an easy way to quickly review the Companies associated with all records to which you 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."

Contacts

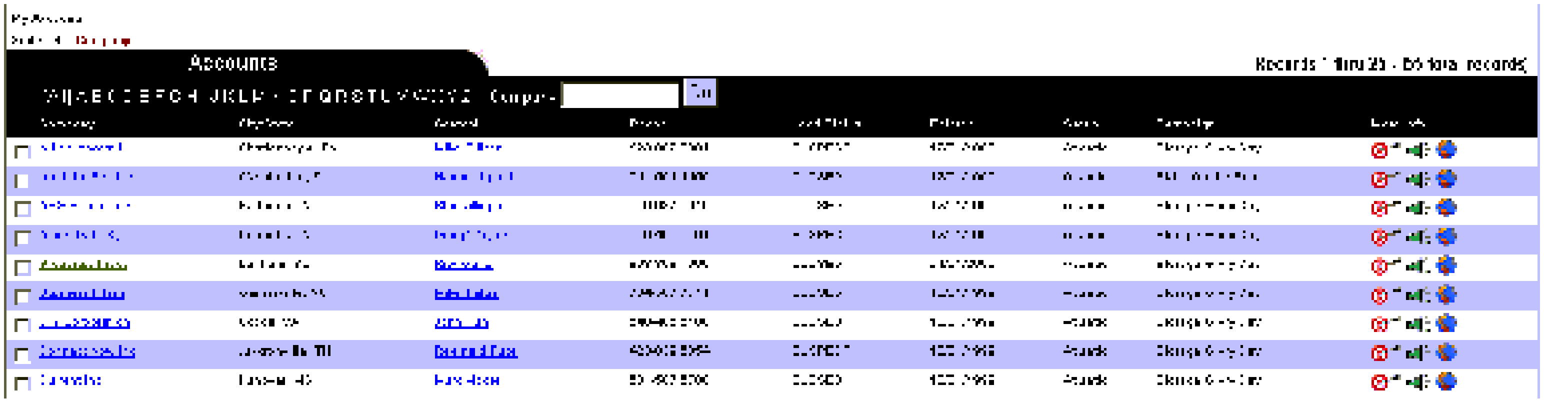

Figure 2: Reviewing Accounts

The new Contacts button immediately creates a list of all of the primary Contacts for all records to which you have access. Like the Accounts function, you 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

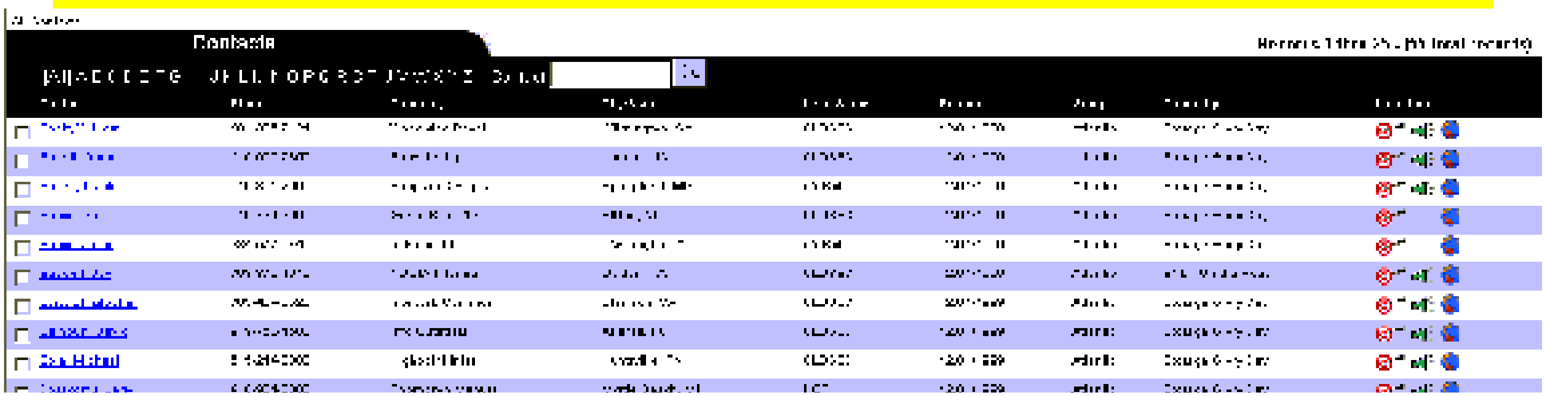

Figure 3: Reviewing Contacts

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."

Reports

The Reports button has been added to the navigation to provide a shortcut for running industry standard reports on all records to which you 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, you have access to the standard Report functions, depending on your 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 you have 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.

Additional Contacts

The Profile screen has been revised to display the name, title, phone and email for each additional contact for that record.

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.

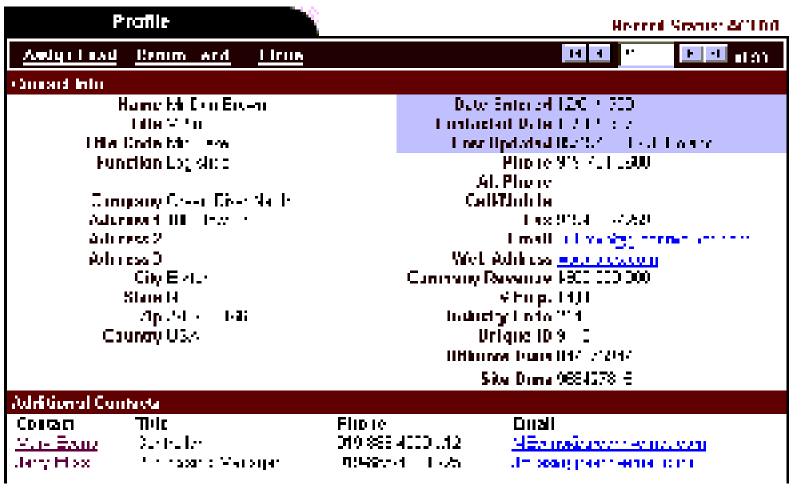

Figure 5: Accessing Additional Contacts