ContactTracking.com
AFFORDABLE CRM SOFTWARE SOLUTIONS

New Features Overview
For Users

Product News

17 October 2001

On Monday 22 October 2001, a number of new enhancements to the application are being launched. Below please find an introduction to these new features.

Save Time With Saved Searches

The capability to save search parameters has been added. Users can define search and sort parameters for their most common queries and save time by running the saved search on the

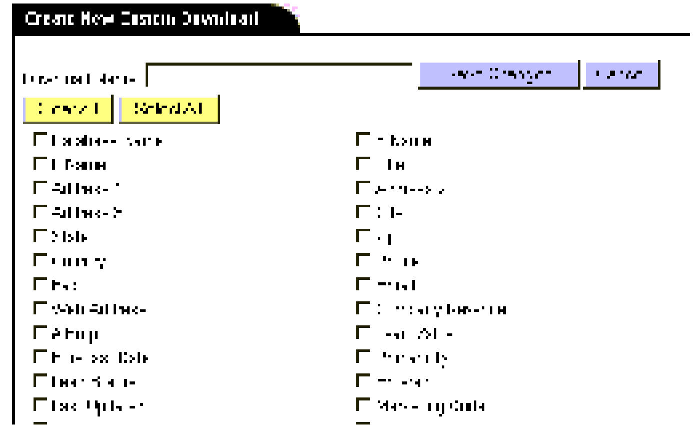
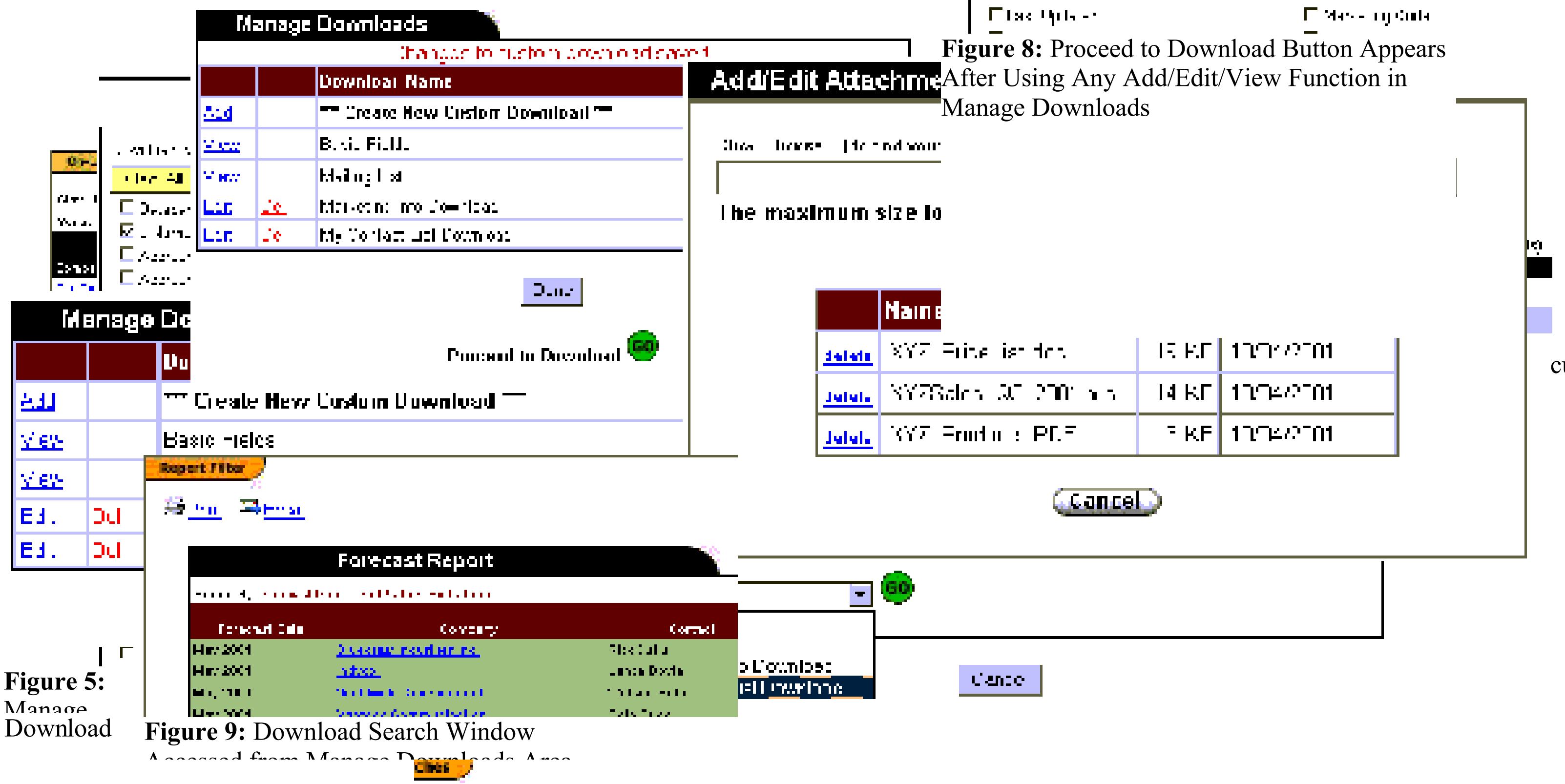


Figure 8: Proceed to Download Button Appears After Using Any Add/Edit/View Function in Manage Downloads



current

Figure 5: Manage

Figure 7: Edit Custom Download Window

Figure 9: Download Search Window Accessed from Manage Downloads Area

database with just one click.

To save a search: Perform a search as usual, entering the desired parameters and sort parameters in the main Search screen and clicking Go. On the Search Results screen, click on the orange Save Search tab above the results (see Figure 1). Enter the desired name for the search and click on Submit. Your Search is now saved and can be accessed from the My Searches area described below.

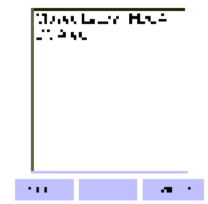
To execute a saved search: Go to the main Search screen and click on the orange My Searches tab near the upper left corner (see Figure 2). The pop-up window will display all of the searches you have saved (see Figure 3). Select the desired search and click on Submit. This will run a real-time query on your records and produce Search Results using the search and sort parameters specified when you created this search.

To delete a saved search: Go to the Saved Search window as above, select the desired search and click delete. A pop-up window will appear asking you to confirm that you wish to delete this saved search.

Figure 1: Search Results Screen With Save Search Tab

Figure 2: My Searches Button on the Main Search Screen

Figure 3: Saved Searches Window



More Powerful Download with Custom Download Capability

The Download function and the associated customization capabilities have been simplified. You can now create and save your own custom download set-ups by selecting the fields you want and giving the download a custom name. You can then access your downloads directly from the search results screen. This gives you the flexibility to choose the field combinations that you want to download most regularly in addition to the two standard downloads: Mailing List and Basic Fields. Custom downloads are user-specific; when a user creates a custom download, it is saved and associated with that user's logon profile; only that user can see the custom downloads they have created when they log into the system. **This enhanced download capability replaces the Customize Download function.** **Note on access privileges: Only those users with Download permissions can utilize this function.**

To download using Mailing List, Basic Fields or an existing Custom Download set-up: Perform the desired search as usual by entering parameters on the main Search screen and clicking Go or using a Saved Search (as described above) to generate the records you wish to download. On the Search Results screen, select the Download format you wish to use in the Download Search drop-down box in the bottom left corner of the page (see Figure 4). You can choose to use the Mailing List or Basic Fields set-up (see descriptions below) or a Custom Download that you have previously created (see below for directions on creating a new Custom Download). Selecting the desired download and clicking Go will immediately launch the download process using the set-up you have chosen. If you do not make a selection, Mailing List is used as the default format for the download.

Figure 4: Download Search on Search Results Page

About the Manage Downloads window: The Manage Downloads window is the starting point for all functions related to Custom Downloads (including Add, Edit and Delete) as well as the View function for the two standard and non-editable downloads (Mailing List and Basic Fields). To access this interface, click on the Manage Custom Downloads hyperlink below the Download Search drop-down box on the Search Results screen (see Figure 4 above) to launch this central window (see Figure 5). The items below describe the functions in more detail.

To create a Custom Download: Click on the Manage Custom Downloads hyperlink below the Download Search drop-down box on the Search Results screen (see Figure 4 above) to launch the Manage Downloads interface (see Figure 5). Click on the Add hyperlink to the left of "Create New Custom Download" to launch the Add interface (see Figure 6) Enter a name for the custom download and select the fields you wish to be included by clicking in the checkbox for the field name. If you wish to leave the Create New Custom Download area without creating a new download, press the Cancel button. When you are finished setting the fields for download, click Save Changes. Saving the new custom download will return you to the Manage Downloads window that lists all available downloads, including your new custom download.

To edit or delete a Custom Download: Click on the Manage Custom Downloads hyperlink below the Download Search drop-down box on the Search Results screen (see Figure 4) to launch the Manage Downloads interface (see Figure 5). To **edit** a Custom Download you have created, click on the Edit hyperlink next to the download name to launch the Edit Existing Download window. Select and deselect the fields you wish to be included in the download and make any desired changes to the download name and then click Save Changes. This will return you to the Manage Downloads window. To **delete** a custom download, simply click on the Delete hyperlink associated with the custom download you wish to delete in the Manage Downloads window (see Figure 5). The system will prompt you to confirm that you wish to delete this custom download.

To view the Mailing List or Basic Fields Download: You cannot change the fields included in the Mailing List or Basic Fields Downloads, nor can you edit the names of these standard downloads. However, you can view the download fields included in these two standard downloads by launching the Manage Downloads window as described above and clicking on the View hyperlink to the left of either of the standard downloads. **Note on access privileges: The fields in the Mailing List are standard system-wide and cannot be changed; the set-up of the Basic Fields Download is database-specific and can be changed, but only by the Administrator.**

Performing a Download directly from the Manage Downloads window: Since you will likely want to utilize a particular Download after you have created, edited or viewed the set-up for it, a shortcut to Download Search appears in the Manage Downloads window (see Figure 8) after you have performed a View, Add or Edit function as described above. To go to the Download Search interface directly from here, simply press the Go button to the right of "Proceed to Download." A Download Search window (see Figure 9) will appear where you can select any of the standard or custom downloads. Keep in mind that the records downloaded will be those included in the search you performed immediately before entering the Manage Downloads interface.

Attach Files to Records

The system now provides a way to attach documents directly to a record in the database. Documents can be uploaded, viewed and deleted. **Note on access privileges: All users have attachment view permission but only users with Full Edit capability are able to upload and delete documents in the attachments area.**

To view an attached document: Go to the Profile screen for the record and scroll down to the More Information section. A list of attached documents appears in the gray box to the right (See Figure 10). Simply click on the filename to launch the desired document.

Figure 10: More Information Area on the Profile Screen

To upload or delete an attached document: Go to the Profile screen for the record and scroll down to the More Information section (see Figure 10) and click on the Add/Edit Attachments hyperlink. A window will open displaying all attached documents and providing a browse/upload buttons (see Figure 11). To **upload** a document, browse for the desired file on your computer or network and once the filename appears in the text box, click on Upload. Once the file is successfully attached to the record, the file name will appear in the file list, along with the file size and date uploaded. File types authorized for upload are set by your Administrator. There is a **3 MB file size limit** per attached document. To **delete** an attached file, simply go to the Add/Edit Attachments interface (see Figure 8) and click on the delete hyperlink to the left of the file you wish to delete.

Figure 11: Add/Edit Attachments Interface

Access Valuable Information on Companies

Users now have instant access to basic company data from Hoover's Online and location maps from MapQuest.com through hyperlinks on the Profile page. Hoover's Online provides basic company information on 14,000 public and private companies in the US and Canada through its company capsules. The capsules contain basic corporate and financial information for the company listed in your record, including contact information, key personnel, overview of products and services, market position, top competitors and more.

To access the company capsule: Go to the Profile screen for the record and scroll down to the More Information section where you will see the Company Capsule (see Figure 10). The company name is pre-entered into the search box as it appears in the record. To locate the Hoover's Online company capsule, click the Find button. You can also enter corrections or additions to the company name in the text entry box or enter the company ticker symbol and then press Find to locate the company profile. However, please note that any changes made to this area are temporary and apply only to the immediate search for the company capsule. Any changes entered here will not be saved in the record and will not affect the Company Name in the main Contact Information section of the record.

Through the link to MapQuest.com, you can instantly access a street map and aerial photo of the location listed in your record. From the map screen, you can get driving directions, find nearby businesses and more. You can also print or email the map, download it to a PDA, or save it through the My MapQuest function.

To access location maps: Go to the Profile screen for the record and scroll down to the More Information section (see Figure 10) and click on the MapQuest.com hyperlink to access a street map of the location listed in the record. To access additional functions such as driving directions and locating nearby businesses, simply click on the relevant button on the MapQuest screen.

Easier Report Email and Print Functions

Emailing and printing reports is now even easier, as the functions have been separated so that each has its own icon on the Report page. **Note on access privileges: Only those users with Reports permissions have access to this function.**

To print a report: Run the desired report and click on the Print hyperlink above the report (see Figure 12). A new window will open containing only the report. Click the Print button to launch the printer interface on your computer.

To email a report: Run the desired report and click on the Email hyperlink above the report (see Figure 12). A new window will open containing only the report. Click the Email button and enter the recipient(s) email address(es) (required) as well as a message to accompany the email (optional). Separate email addresses for multiple recipients with a comma.

Figure 12: Print and Email Options from Report Screen