

LeadMaster Release Notes – 02/02/2009

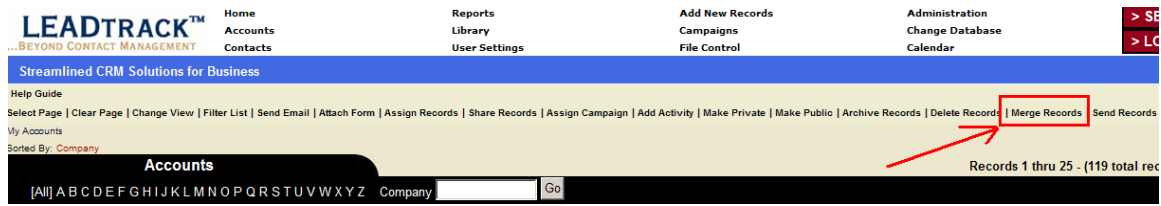
About the Release

This release includes the following features and changes:

1. Merge records feature
2. Share records feature
3. Workgroup shortcuts
4. Workgroup searches
5. Workgroup dashboards
6. Security updates

Merge Records Feature

This feature provides the ability for users to merge information from two or more records into a single record. It is available on the "Accounts" and "Search Results" pages and to users who have the logon privilege "Archive Records".



Merge Records

From the "Accounts" or "Search Results" page, select two or more records to merge and click on the "Merge Records" hyperlink to display the "Merge Records" popup dialog.

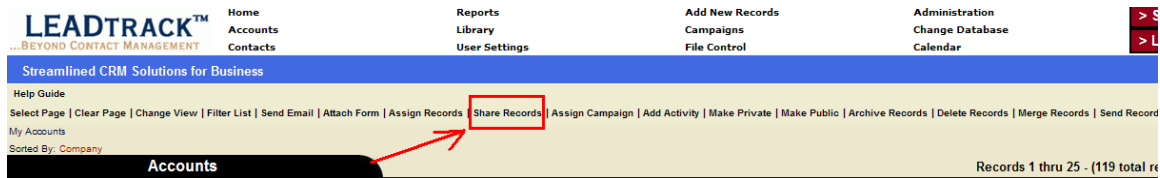


From this dialog, select the target record for the merge. Information for the other selected records (the "source" records) will be merged into the target record. The merging process follows the following steps:

3. Any attached files from the source record(s) are moved to the target record.
4. Contacts from the source record(s) are matched by name and / or email address to the target record. Contacts that are not matched are copied to the target record. Any comments from the associated source record are copied as "Contact Notes" for the copied contact.
5. Custom forms from the source record(s) are matched to the target record. Custom forms that are not matched are copied to the target record.
6. Any opportunities from the source record(s) are moved to the target record.
7. Any callbacks / events from the source record(s) are moved to the target record.
8. Any call center stats recorded for the source record(s) are moved to the target record.
9. The source records are deleted.

Share Records Feature

This feature provides the ability for users to access and collaborate on records to which they do not have access to as defined by the security rules for the workgroup. For example, a record may be assigned to a single account manager and partner rep. If other account managers need access to the record, the record can be shared. It is available on the "Accounts" and "Search Results" pages as well as the "Record Update", "View Profile" or "Edit Profile" pages and to users who have the logon privilege "Share Records".



Sharing Records from the Accounts and Search Results page

From the "Accounts" or "Search Results" page, click on the "Share Records" hyperlink to display the "Share Records" popup dialog.

Share Records

RECORD SELECTION

Share or remove sharing on selected records in the search results
To select record(s), click the checkbox to the left of the record(s) on the search results page.

Share or remove sharing on all records in the search results

USER SELECTION - All Users or No Users

Share with ALL users Remove sharing for ALL users

USER SELECTION - Specific Users

Available Users

Supra Admin
Ed Gal
a1 gallaghe
a gallagher
am Gallagher
Colleen Gallagher
Ed Gallagher
g Gallagher
p Gallagher

Selected Users:

The following options are available for sharing or removing sharing on records:

- **RECORD SELECTION:** Share or remove sharing on selected records or all records in the search results.
- **Share with ALL users:** Allows you to share the specified records with ALL users.
- **Remove sharing for ALL users:** Allows you to remove sharing on the specified records for ALL users.
- **Specific Users:** Allows you to share or remove sharing on the specified records for the specific users.

Sharing Records from the Record Update, View Profile or Edit Profile pages

From the "Record Update", "View Profile" or "Edit Profile" page, click on the "Share Record" hyperlink to display the "Share Record" popup dialog.

The following options are available for sharing or removing sharing on the record:

- **Share with ALL users:** Allows you to share the record with ALL users.
- **Remove sharing for ALL users:** Allows you to remove sharing on the record for ALL users.
- **Specific Users:** Allows you to share or remove sharing on the record for the specific users.
- When displayed from the Record Update, View Profile or Edit Profile pages, the "Share Record" dialog will show the current user(s) who are sharing the record.

Adding sharing on a record for ALL users

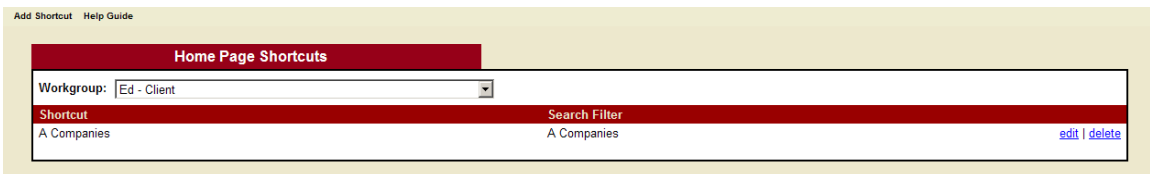
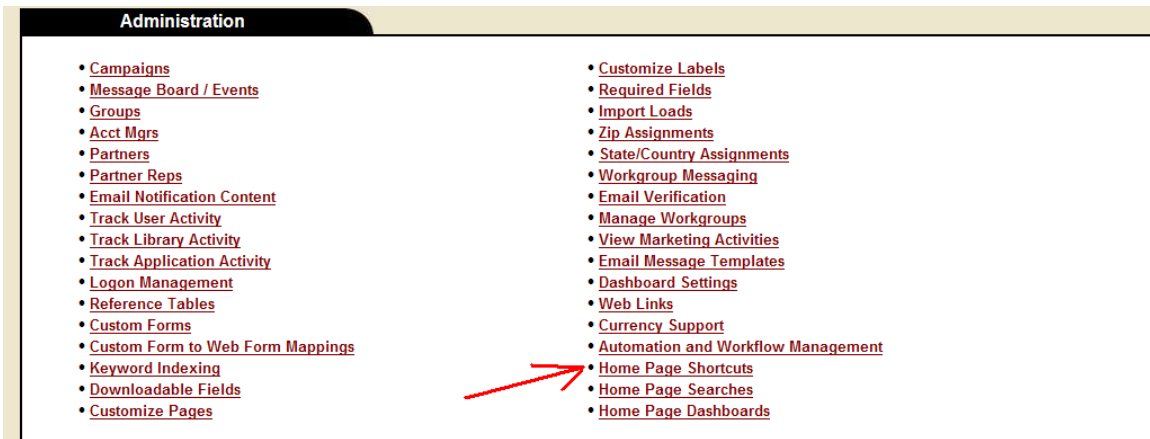
To provide global access to a record or records, check the "Share with ALL users" field.

Removing sharing on a record for ALL users

To remove global access to a record or records, check the "Remove sharing for ALL users" field.

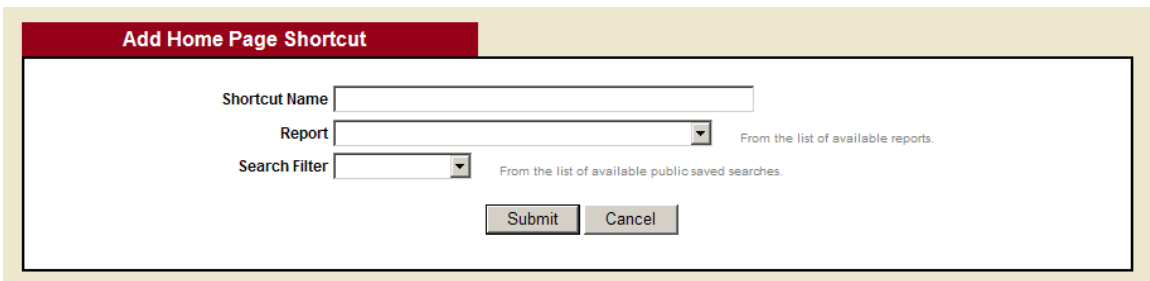
Home Page Shortcuts

This feature allows an administrator to create a shortcut to a report and make a link to the shortcut visible on the home page of one or more users of the workgroup. It is available on the "Administration" page.



Adding a Shortcut

From the "Home Page Shortcuts List" page, click on the "Add Shortcut" hyperlink to display the "Add Home Page Shortcut" page:



From this page:

- Enter a name for the shortcut.

- Select a report from the list of available reports.
- Select a search filter for the report from the list of available public saved searches.
- Click "Submit" to save the new shortcut.

Once saved, you can now make a link to the shortcut visible on the home page of one or more users:

Edit Home Page Shortcut

Shortcut Name

Search Filter From the list of available public saved searches.

USER SELECTION - Display a link to the shortcut on the home page of all users or no users

Display a link to the shortcut on the home page of ALL users Remove the link to the shortcut from the home page of ALL users

USER SELECTION - Display a link to the shortcut on the home page of specific users

Available Users

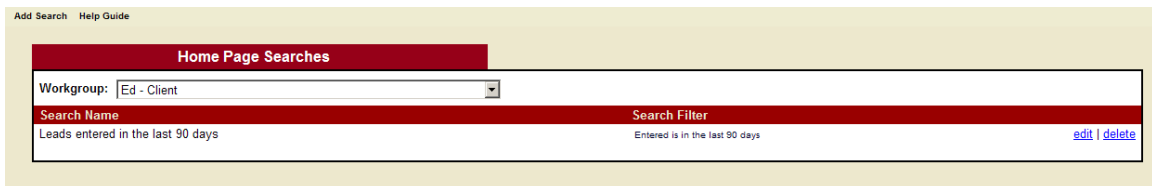
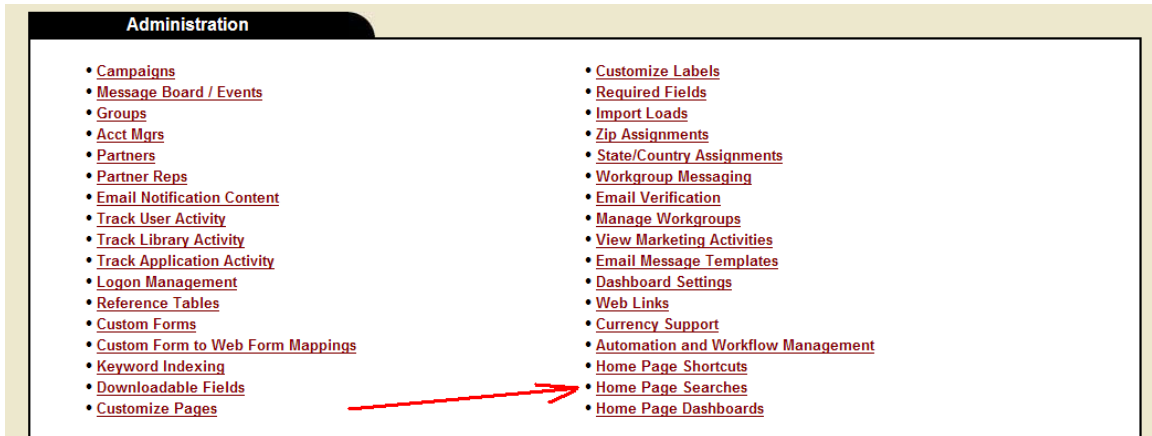
- Supra Admin
- Ed Gal
- a1 gallaghe
- a gallagher
- am Gallagher
- Colleen Gallagher
- Ed Gallagher
- g Gallagher
- p Gallagher

Selected Users:

- Click on the "Display a link to the shortcut on the home page of ALL users" checkbox to make a link to the shortcut visible on the home page of all users who have access to the workgroup.
- Click on the "Remove the link to the shortcut from the home page of ALL users" checkbox to remove the link to the shortcut from the home page of all users who have access to the workgroup.
- Select one or more users for the list of available users and click "Add >>" to make the link to the shortcut visible on the home page of the selected users.
- Select one or more users for the list of selected users and click "<< Remove" to remove the link to the shortcut from the home page of the selected users.

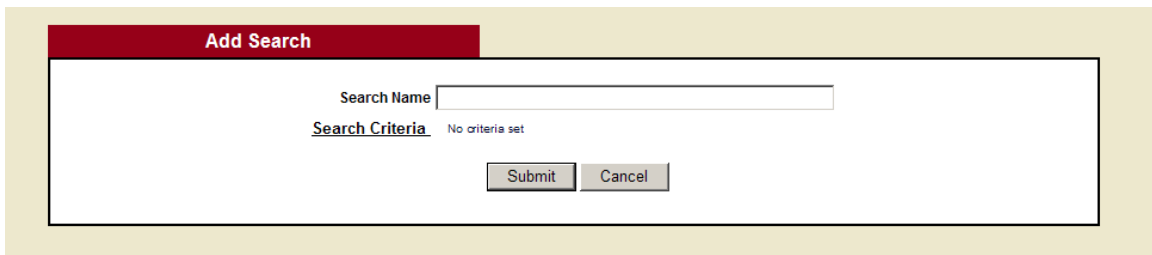
Home Page Searches

This feature allows an administrator to create a public saved search and make a link to the search visible on the home page of one or more users of the workgroup. It is available on the "Administration" page.



Adding a Search

From the "Home Page Searches List" page, click on the "Add Search" hyperlink to display the "Add Search" page:



From this page:

- Enter a name for the search.
- Click on the "Search Criteria" hyperlink to define the criteria for the search.
- Click "Submit" to save the new search.

Once saved, you can now make a link to the search visible on the home page of one or more users:

Edit Search

Search Name

Search Criteria Entered is in the last 90 days

USER SELECTION - Display a link to the search on the home page of all users or no users

Display a link to the search on the home page of ALL users Remove the link to the search from the home page of ALL users

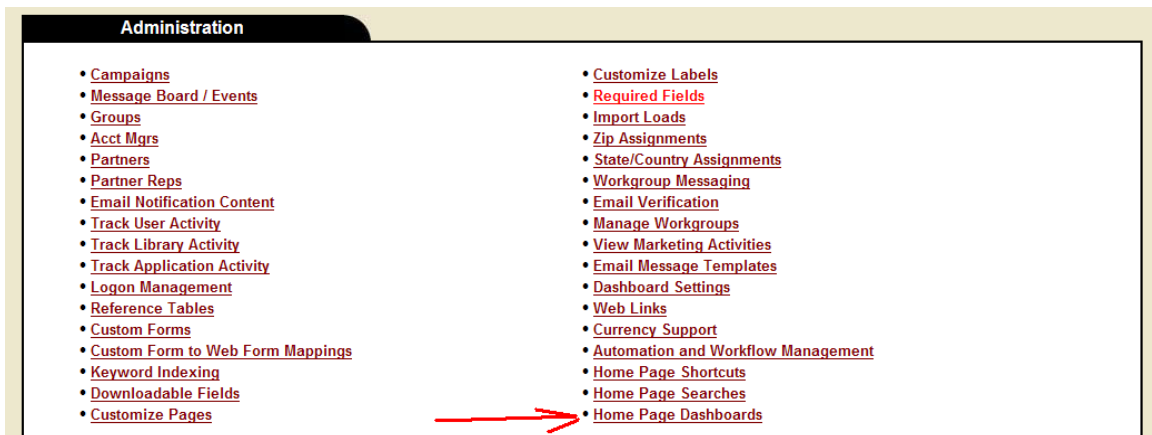
USER SELECTION - Display a link to the search on the home page of specific users

| Available Users | | Selected Users: |
|--|---|--|
| <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> Supra Admin Ed Gal a1 gallaghe a gallagher am Gallagher Colleen Gallagher Ed Gallagher g Gallagher p Gallagher </div> | <input type="button" value="Add >>"/> <input type="button" value="<< Remove"/> | <div style="border: 1px solid gray; width: 100%; height: 100%;"></div> |
| <input type="button" value="Submit"/> <input type="button" value="Cancel"/> | | |

- Click on the "Display a link to the search on the home page of ALL users" checkbox to make a link to the search visible on the home page of all users who have access to the workgroup.
- Click on the "Remove the link to the search from the home page of ALL users" checkbox to remove the link to the search from the home page of all users who have access to the workgroup.
- Select one or more users for the list of available users and click "Add >>" to make a link to the search visible on the home page of the selected users.
- Select one or more users for the list of selected users and click "<< Remove" to remove the link to the search from the home page of the selected users.

Home Page Dashboards

This feature allows an administrator to create a dashboard report and make it visible on the home page of one or more users of the workgroup. It is available on the "Administration" page.



| Home Page Dashboard Reports | | | | | | |
|---|-----------------------------|-----------------------------------|------------|------------|---------------|---|
| Workgroup: Ed - Client | | | | | | |
| Report Name | Report Type | Search Filter | Chart Type | Chart Size | Display Order | |
| Opportunity Forecast Report - Leads entered in the last 90 days | Opportunity Forecast Report | Leads entered in the last 90 days | 2D pie | Small | 2 | edit delete |

Adding a Dashboard Report

From the "Home Page Dashboard Reports List" page, click on the "Add Report" hyperlink to display the "Add Home Page Dashboard Report" page:

| Add Home Page Dashboard Report | |
|---|---|
| Report Name | <input type="text"/> |
| Report | <input type="text"/> <small>From the list of available dashboard reports.</small> |
| Search Filter | <input type="text"/> <small>From the list of available public saved searches.</small> |
| Chart Type | 2D pie |
| Chart Size | Small |
| Display Order | 3 |
| <input type="button" value="Submit"/> <input type="button" value="Cancel"/> | |

From this page:

- Enter a name for the dashboard report.
- Select a dashboard report from the list of available reports.
- Select a search filter for the report from the list of available public saved searches.
- Select the chart type, chart size and enter the display order for the report.
- Click "Submit" to save the new dashboard report.

Once saved, you can now make the dashboard report visible on the home page of one or more users:

Edit Home Page Dashboard Report

Report Name

Search Filter From the list of available public saved searches.

Chart Type

Chart Size

Display Order

USER SELECTION - Display the dashboard report on the home page of all users or no users

Display the dashboard report on the home page of ALL users Remove the dashboard report from the home page of ALL users

USER SELECTION - Display the dashboard report on the home page of specific users

| Available Users | Add >> | Selected Users: |
|---|---|--|
| <input type="text" value="Supra Admin"/> <input type="text" value="Ed Gal"/> <input type="text" value="a1 gallaghe"/> <input type="text" value="a gallagher"/> <input type="text" value="am Gallagher"/> <input type="text" value="Colleen Gallagher"/> <input type="text" value="Ed Gallagher"/> <input type="text" value="g Gallagher"/> <input type="text" value="p Gallagher"/> | <input type="button" value="Add >>"/> <input type="button" value="<< Remove"/> | <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> |
| <input type="button" value="Submit"/> <input type="button" value="Cancel"/> | | |

- Click on the "Display the dashboard report on the home page of ALL users" checkbox to make the dashboard report visible on the home page of all users who have access to the workgroup.
- Click on the "Remove the dashboard report from the home page of ALL users" checkbox to remove the dashboard report from the home page of all users who have access to the workgroup.
- Select one or more users for the list of available users and click "Add >>" to make the dashboard report visible on the home page of the selected users.
- Select one or more users for the list of selected users and click "<< Remove" to remove the dashboard report from the home page of the selected users.

Security Updates

When a public search is created and made available to other users, the security settings for each user who makes use of the public search is incorporated into the search. This includes public searches that are linked to dashboard reports and shortcuts.