

LOGON MANAGEMENT

The Logon Management function is where you set up the individual user logons. This can be reached via the Administration function in the top banner of the application. Logons can be Added, Edited and Deleted via this function.

Individual logons can be edited by clicking on the edit hyperlink. In addition, there are two other individual logon screens that define user internal setting [Internal hyperlink] and user profile information [Profile hyperlink]. Below is the main Logon Management screen:

The screenshot shows the Logon Management interface. At the top, there is a navigation menu with links for Home, Contacts, Reports, Library, User Settings, Add New Records, Campaigns, Search Archives, Administration, and Calendar. A search bar and a LOGOUT button are also present. Below the navigation is a sub-header for 'Your Web-Based CRM Application' with links for New Logon, Security Level, Download, and Help Guide. The main content area is titled 'Logon Management' and features a search filter with fields for Last Name, Username, and Email, along with a GO button. A dropdown menu for Workgroup is set to 'View ALL Workgroups'. Below this is a table with columns: First Name, Last Name, Username, Type, Workgroup(s), Last Accessed, Status, Count, and Function. The table contains one record for Wendy Johnstone, an Administrator in the XYZ Widgets workgroup, last accessed on 7/19/2007 at 10:32 AM, with an Active status and a Count of 31. A 'Delete' link is provided for this record. At the bottom, there is a pagination control showing 'Page: 1 of 1' and 'Total Records: 1'.

First Name	Last Name	Username	Type	Workgroup(s)	Last Accessed	Status	Count	Function
Wendy	Johnstone	adminguide	Administrator	XYZ Widgets	7/19/2007 10:32 AM	Active	31	Privileges Internal User Profile

To add a new user logon, click on the New Logon tab on the Logon Management screen:

yourlogo appears here

Home | Library | Campaigns | Calendar
 Contacts | User Settings | Search Archives
 Reports | Add New Records | Administration

SEARCH | LOGOUT

Your Web-Based CRM Application

Logon List | Privileges | Help Guide

Add Logon

Submit | Cancel

User Information

First Name
 Last Name
 Username
 New Password ?
 Verify Password
 Group
 Default Label Set: Standard Set
 Active Status: Active
 Set Security: [--- Available Levels ---]

Workgroup Access

Have Access To:

XYZ Widgets

Basic Access

User Type: [--- Please Choose ---]
 Enable Edit Profile: Yes No
 Allow Edit on Custom Forms: Yes No
 Send Email: Yes No
 Receive Email: Yes No
 Express Email: Yes No
 Multiple Email Distribution: Yes No

Search Privileges

Search Type: Basic Search
 Custom Search Access
 Archive Leads
 Delete Leads

Profile Privileges

- View Record Update
- Show Profile Summary Section in Record Update
- Show Custom Forms/Web capture
- Show Attached Files
- Show Lead Highlight Comments
- Add Call Backs via Add New Record
- Edit Contacts
- Edit Highlight/General Comments
- Assign Leads
- Partner Rep View (Allow Partner Reps to view other Partner Reps within same Partner)
- Add Custom Form
- Delete Custom Form
- Clone Leads
- Clone Opportunities
- Add/Edit Other Partners
- Add/Delete Marketing Activities
- Delete Email History
- Call Center Stats (Only active if Call Center Stats is enabled for workgroup)

Command Privileges

- Edit Message Board
- Access to Dashboard
- Access to Administration
- Access to Campaigns
- Add New Records
- Access to Report Filter
- Report Wizard (Only active if Access to Report Filter is checked)
- Track User Activity
- Create Public Search/Download Templates

<p>Download/Upload</p> <input type="checkbox"/> Download Records <input type="checkbox"/> Import Data <input type="checkbox"/> Import Custom Form Data <input type="checkbox"/> Import Additional Contacts <input type="checkbox"/> View All Imports for Assigned Workgroups	<p>Other Privileges</p> <input type="checkbox"/> View Library <input type="checkbox"/> Upload files to Library <input type="checkbox"/> Create/Rename/Move Folders & Files in Library <input type="checkbox"/> Create/Delete Private Folders in Library <input type="checkbox"/> Delete files in Library <input type="checkbox"/> Manage Group Email Templates <input type="checkbox"/> Access to Group Email Templates												
<p>Event/Call Back Privileges</p> <input type="checkbox"/> Set Events/Call Backs <input type="checkbox"/> Delete Events/Call Backs <input type="checkbox"/> Show Up in List of Assignments <p>Advanced Calendar Access (Calendar type must also be enabled in workgroup)</p> <input type="checkbox"/> Access to My Calendar Only <input type="checkbox"/> Access to My Calendar and Group Calendar	<p>Field Edit</p> <input type="checkbox"/> Initial Status <input type="checkbox"/> Campaign <input type="checkbox"/> Lead Source <input type="checkbox"/> Marketing Mix <input type="checkbox"/> Mandatory Fields <input type="checkbox"/> View Sales Rep Comments Only <input type="checkbox"/> Edit Sales Rep Comments												
<p>Offline/Mobile Access Privileges</p> <table border="0"> <tr> <td><input type="checkbox"/> Offline client access</td> <td>Last accessed</td> <td>Version</td> </tr> <tr> <td><input type="checkbox"/> Mobile Access</td> <td>Last accessed</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Outlook Sync Access</td> <td>Last accessed</td> <td>Version</td> </tr> <tr> <td><input type="checkbox"/> Email History Access</td> <td>Last accessed</td> <td>Version</td> </tr> </table>	<input type="checkbox"/> Offline client access	Last accessed	Version	<input type="checkbox"/> Mobile Access	Last accessed		<input type="checkbox"/> Outlook Sync Access	Last accessed	Version	<input type="checkbox"/> Email History Access	Last accessed	Version	
<input type="checkbox"/> Offline client access	Last accessed	Version											
<input type="checkbox"/> Mobile Access	Last accessed												
<input type="checkbox"/> Outlook Sync Access	Last accessed	Version											
<input type="checkbox"/> Email History Access	Last accessed	Version											

Submit Cancel

This screen is for setting up the basic logon information plus user privileges at the individual user level.

Key logon fields:

- First/Last Name is the name that appears on the Home Page when user signs in. If the user is being set up at one of the four user levels [Group Contact, Acct Mgr, Partner Contact, Partner Rep] then the First/Last Name in the appropriate level table must exactly match the First/Last Name of their logon record.
- As an example, if a user called Brian Smith is accessing the application at the Acct Mgr level then he must have a record in the Acct Mgr table showing a First/Last Name of Brian Smith and he must also have a logon record that access that workgroup with a User Type of Account Manager.
- Username must be unique (across all users of the application). It is strongly suggested that the users individual email address be used as the Username for uniqueness and ease of remembering one's Username.
- Password can be anything but it is recommended for ease of implementation that the temporary password for all users be set to some common value such as "newuser". The first time the user logs in they will be required to change this initial password setting.
- Group is just for customer identification purpose in order to perhaps identify a group of users within a database.
- Label Set can be set to Standard Set or customized for a particular company(s). This is what is discussed in detail in the Admin function called Custom Labels above.
- Active Status defaults to Active. A user can be temporarily made Not Active that prevents them from logging into the application. The user logon can be deleted by setting the Active Status to Delete – this will make the logon not accessible to the user or the customer admin

level personnel(s).

- The Workgroups field allows for the assignment of a user to one or more workgroups via a single logon. Note that logon privileges defined in the Logon Management screen apply to all workgroups that the user is given access to. If a user needs different levels of access to one or more workgroups then multiple logons must be established. NOTE: Only User Type = Administrator can have access to more than one workgroup.
- The table below gives a brief description of the individual privileges in the remaining sections of the Logon Management screen.

In order to help in the set up and standardization of user logons across a workgroup the application has a Security Level template feature that allows you to predefine a set of security privileges for a particular set of users and then use that template when creating future user logons.

The Security Levels template feature can be reached by clicking on the Security Level tab in the upper left-hand corner of the Logon Management screen. The following is the basic Security Level template screen:

The screenshot shows a web-based CRM application interface. At the top, there is a navigation bar with the logo "yourlogo appears here" and several menu items: Home, Contacts, Reports, Library, User Settings, Add New Records, Campaigns, Search Archives, Administration, and Calendar. On the right side of the navigation bar, there are buttons for "SEARCH" and "LOGOUT". Below the navigation bar, there is a header section with "Your Web-Based CRM Application" and two buttons: "Logon List" and "Return To List". The main content area is titled "Edit - Don Hall demo" and contains four panels: "Security Level", "Associated Workgroup", "Basic", and "Search Privileges". The "Security Level" panel has a "Level Name" field with the value "Don Hall demo" and a "Default Label Set" dropdown menu with "Standard Set" selected. The "Associated Workgroup" panel has a "Workgroup(s) Available:" field and an "Assigned To:" field with the value "XYZ Widgets". There are "Add >>" and "<< Remove" buttons between these two fields. The "Basic" panel has a "User Type" dropdown menu with "Account Manager" selected and several radio button options: "Enable Edit Profile" (Yes/No), "Allow Edit on Custom Forms" (Yes/No), "Send Email" (Yes/No), "Receive Email" (Yes/No), "Express Email" (Yes/No), and "Multiple Email Distribution" (Yes/No). The "Search Privileges" panel has a "Search Type" dropdown menu with "Advanced Search" selected and three checkbox options: "Custom Search Access" (checked), "Archive Leads" (checked), and "Delete Leads" (unchecked). At the top right of the main content area, there are buttons for "Submit", "Save As", "Delete", and "Cancel".

Profile Privileges	Command Privileges
<input checked="" type="checkbox"/> View Record Update <input checked="" type="checkbox"/> Show Profile Summary Section in Record Update <input checked="" type="checkbox"/> Show Custom Forms/Web capture (Sales Update screen) <input checked="" type="checkbox"/> Show Attached Files (Sales Update screen) <input checked="" type="checkbox"/> Show Lead Highlight Comments (Sales Update screen) <input checked="" type="checkbox"/> Add Call Backs via Add New Record <input checked="" type="checkbox"/> Edit Contacts <input checked="" type="checkbox"/> Edit Highlight/General Comments <input checked="" type="checkbox"/> Assign Leads <input type="checkbox"/> Partner Rep View (Allow Partner Reps to view other Partner Reps within same Partner) <input type="checkbox"/> Add Custom Form <input type="checkbox"/> Delete Custom Form <input type="checkbox"/> Clone Leads <input type="checkbox"/> Clone Opportunities <input type="checkbox"/> Add/Edit Other Partners <input type="checkbox"/> Add/Delete Marketing Activities <input type="checkbox"/> Delete Email History <input type="checkbox"/> Call Center Stats (Only active if Call Center Stats is enabled for workgroup)	<input type="checkbox"/> Edit Message Board <input type="checkbox"/> Access to Dashboard <input type="checkbox"/> Access to Administration <input type="checkbox"/> Access to Campaigns <input checked="" type="checkbox"/> Add New Records <input checked="" type="checkbox"/> Access to Report Filter <input checked="" type="checkbox"/> Report Wizard (Only active if Access to Report Filter is checked) <input type="checkbox"/> Track User Activity <input type="checkbox"/> Create Public Search/Download Templates

Download/Upload	Other Privileges
<input type="checkbox"/> Download Records <input type="checkbox"/> Import Data <input type="checkbox"/> Import Custom Form Data <input type="checkbox"/> Import Additional Contacts <input type="checkbox"/> View All Imports for Assigned Workgroups	<input checked="" type="checkbox"/> View Library <input type="checkbox"/> Upload files to Library <input type="checkbox"/> Create/Rename/Move Folders & Files in Library <input type="checkbox"/> Create/Delete Private Folders in Library <input type="checkbox"/> Delete files in Library <input type="checkbox"/> Manage Group Email Templates <input checked="" type="checkbox"/> Access to Group Email Templates
Event/Call Back Privileges	Field Edit
<input checked="" type="checkbox"/> Set Events/Call Backs <input type="checkbox"/> Delete Events/Call Backs <input checked="" type="checkbox"/> Show Up in List of Assignments Advanced Calendar Access (Calendar type must also be enabled in workgroup) <input checked="" type="checkbox"/> Access to My Calendar Only <input type="checkbox"/> Access to My Calendar and Group Calendar	<input type="checkbox"/> Initial Status <input checked="" type="checkbox"/> Campaign <input type="checkbox"/> Lead Source <input type="checkbox"/> Marketing Mix <input checked="" type="checkbox"/> Mandatory Fields <input type="checkbox"/> View Sales Rep Comments Only <input type="checkbox"/> Due Date (Call Center users only)
Offline/Mobile Access Privileges	
<input checked="" type="checkbox"/> Offline client Access <input checked="" type="checkbox"/> Mobile Access <input checked="" type="checkbox"/> Outlook Sync Access <input type="checkbox"/> Email History Access	

The Security Levels template will allow for pre-defining all of the privileges below plus the Label Set and Companies field.

The second column of the table below contains the sample Security Levels setting for an Acct Mgr level user. This table can be expanded to include additional column to define users at the Admin, Global, Group, Partner and Partner Rep levels.

Clone Opportunities	Y	Ability to Clone individual Opportunities within a record
Add/Edit Other Partners	Y	
Add/Delete Marketing Activities	Y	Ability to add/delete Marketing Activities in the Contact screen
Delete Email History	Y	Ability to delete Email History in the Contact screen
Call Center Stats	Y	Turns on the Call Stats section of the Edit Profile screen that allows for recording Call Center Stats every time that the Edit Profile screen is updated (this is what drives the Call Center Stats reports)
Download/Upload Privileges		
Download Reports	Y	Ability to download records from Search Results or Report Filter
Import Data	Y	Ability to Import Data (Either Custom Format or Self-Import Free Format)
Import Custom Form Data	Y	Ability to import Custom Form data via the Import Data routine
Import Additional Contacts	Y	Ability to import Additional Contacts via the Import Data routine (this allows the user to import and match contacts against existing record. If no match on record key a new record will be added, if a match on record key but not contact name then contact will be added to existing record, if match on record key and contact name then import record will be bypassed)
View All Imports for Assigned Workgroups	Y	Ability to see Import Data Log for all imports to authorized Workgroups [Individual users can only see files that they have imported]
Event/Call Back Privileges		
Set Events/Call Backs	Y	Ability to create/modify Events/Call Backs (Calendar function, Home Page hyperlink or individual record)

Default Label Set	Standard Set	Standard Field Tag template
Basic		
User Type	Account Manager	LeadMaster security level for an Account Manager level logon
Enable Edit Profile	Y	Access to Edit Profile tab on Profile (also hyperlink on contact name on Search Results)
Allow Edit on Custom Forms	Y	Allows user to edit fields on custom forms
Send Email	Y	Allows user to send emails from within certain application functions
Receive Email	Y	Receive daily Email Notification (Region, Sales Person, Partner Mgr, Partner Rep only)
Express Email	Y	Receive immediate Email Notification of leads that have been entered and assigned online - single assignment from Profile only [applies only to Acct Mgr and Partner Rep]
Multiple Email Distribution	Y	
Profile Privileges		
View Record Update	Y	Access to Record/ Sales Update tab on Profile
Show Profile Summary Section in Record Update	Y	Ability to turn ON/OFF the Profile Summary section in Record Update screen
Show Custom Forms/Web capture (Record Update screen)	Y	Ability to turn ON/OFF the Custom Forms/Web Capture section in Record Update screen
Show Attached Files (Record Update screen)	Y	Ability to turn ON/OFF the Attached Files section in Record Update screen
Show Lead Highlight Comments (Record Update screen)	Y	Ability to turn ON/OFF the Lead Highlights section in Record Update screen
Add Call Backs via Add New Record	Y	Ability to turn ON/OFF the Call Backs in the Add New Record screen
Edit Contacts	Y	Access to Add Contacts tab on Profile
Edit Highlight/General Comments		Allow user to edit Highlight/General Comments field
Assign Leads	Y	Ability to assign leads to Sales Person and/or Partner Rep (from Add, Edit, Profile, etc.)
Partner Rep View	Y	Allow Partner Reps to view other Partner Reps within same Partner
Add Custom Form	Y	Ability to add a Custom Form on an Add, Profile, etc.
Delete Custom Form	Y	Ability to physically delete an attached Custom Form (form and content can't be retrieved)

Security Levels	Sample Level	Comments
Security Level		
Level Name	XYZ Acct Mgr Template	Customer level description assigned by company administrator
Clone Leads	Y	Ability to Clone a Lead on Profile
Delete Events/Call Backs	Y	Ability to delete Events/Call Backs (Calendar function, Home Page hyperlink or individual record)
Show Up in List of Assignments	Y	Display this individual's name in the Assigned To List in the Call Back/Event detail screen
Access to My Calendar Only	Y	Access to My Calendar Only (user will not have access

Outlook Sync Access	Y	Ability to sync user's PC Outlook Contacts and Calendar with their assigned records on the server (requires installation of separate add-on module on user's PC)
Email History Access	Y	Ability to upload Outlook emails from the user's PC to the assigned records on the server (requires installation of separate add-on module on user's PC)
Associated Workgroup		
Workgroup(s) Available	Workgroup A	Workgroups that are assigned to this logon for access (Administration level is the only one that can have more than one assigned workgroup)
Search Privileges		
Search Type	Advanced	Five basic types: Basic, Advanced [Includes Special Interest search areas], Power [Includes Special Interest and CRM search areas, Sales [has special Record Update screen format] and Call Center [this is geared to unique type of Call Center user]
Custom Search Access	Y	Applies only to databases that have customized forms
Archive Leads	Y	Ability to Archive records
Delete Leads	Y	Ability to delete records that have been Archived
Command Privileges		
Edit Message Board	Y	Ability to edit and maintain the Information Center text and Event Tracker
Access to Dashboard	Y	Ability to create and view a number of predefined charts/graphs (charts/graphs appear on Home Page)
Access To Admin		Ability to maintain some application tables
Access to Campaigns	Y	Ability to edit and maintain the detailed Campaign screen
Add New Records	Y	Ability to Add a Lead (via Add New Records function in Home Page banner)
Access to Report Filter	Y	Access to Report Filter (via the Search Results screen)
Report Wizard	Y	Ability to create, store and run basic reports
Track User Activity	Y	Ability to run queries based on workgroups, user types and date range creating a report by user name of User Type, # Logons, # Records Created, # Records Updated (limited to last 60 days)
Create Public Search/Download Templates	Y	Ability to create and save both Public Searches and Download Templates (
		to the Group Calendar but will be able to see all Call Backs/Events for the record assigned to the individual's logon)
Access tp My Calendar and Group Calendar	Y	Access to My Calendar as well as the Group Calendar (will only have access to Call Backs/Events for the records that the individual logon is assigned
Offline/Mobile Access Privilges		
Offline client Access	Y	Ability to download assigned records, work offline and then sync with server (requires installation of separate add-on module on user's PC)
Mobile Access	Y	Ability to access limited records information remotely (requires installation of separate add-on module on user's PC)
Other Privileges		
Create Campaign Questions	Y	

View Library	Y	Allows user to view company Library via banner
Upload files to Library	Y	Allows user to upload new files to the Library [usually an Administrator function]
Create/RenameMove Folders & Files in Library	Y	Allows user to rename files in the Library [usually an Administrator function]
Create/Delete Private Folders in Library	Y	Allows user to create/delete Private Folders in the Library [usually an Administrator function]
Delete files in Library	Y	Allows user to delete files from the Library [usually an Administrator function]
Manage Group Email Templates	Y	Allows user to create/edit/delete Group Email Templates [usually an Administrator function] – this function is accessed via the envelope icon on the Contact Name
Access to Group Email Templates	Y	Allows the user to choose predefined Goup Email Templates when send email the envelope icon on the Contact Name

Initial Status	Y	Allows user to edit the Initial Status field on the Edit Profile and Record Update screens
Campaign	Y	Allows user to edit the Initial Status field on the Edit Profile screen
Lead Source	Y	Allows user to edit the Initial Status field on the Edit Profile and Record Update screens
Marketing Mix	Y	Allows user to edit the Initial Status field on the Edit Profile screen
Mandatory Fields	Y	Gives user access to the Administration/Set Required Fields function to set defined mandatory fields
View Sales Rep Comments Only	Y	Allows user to only view Sales Rep Comments field
Edit Sales Rep Comments	Y	Allows user to edit the current comments in the Sales Rep Comments field
Access to Case Management	Y	Gives user access to Case Management
Field Edit		

NOTE → Existing Logons can be edited by clicking on the edit hyperlink on the main Logon Management screen.

After setting up the basic user logon screen the user will be presented with the Internal Security Logon screen (also available for existing logons by clicking on the Internal hyperlink on the main Logon Management screen) that further sets up the users access to a particular workgroup.

Below is an example of the Internal Security screen. For Admin level logons that have access to more than one workgroup the user will be presented with a “summary” level screen showing all workgroups.

The Internal Security attributes for each workgroup can be viewe by clicking on the settings hyperlink. [If the logon has access to only one workgroup then this screen will not appear and it will automatically display the detailed Internal Security screen below]

Workgroup	Message Board	Custom Label	Campaign	State Access	Zipcode Access	Country Access	
(TEMPLATE Demo)	.Main Bulletin Board!	Default Override	ALL	ALL	ALL	ALL	settings
XYZ Widgets	Main Bulletin Board	Default Override	ALL	ALL	ALL	ALL	settings

The individual Internal Security level can be edited by clicking on the edit hyperlink. Below is an example of the detailed Internal Security level for a single workgroup:

Workgroup: XYZ Widgets

Set Bulletin Board: Main Bulletin Board

Label Set: Do not set (Let user default override)

Listed in Call Back Assignment: Yes No

Campaign/Geography Access [Should be used only for User Type = Administrator]

Campaigns

- [-- ALL --]
- BAI
- Mercury Road
- Outbound Call - 2004
- RRT Survey

States

- [-- ALL --]
- ALABAMA
- ALASKA
- ALBERTA
- ARIZONA

Zipcodes

- [-- ALL --]
- 010 MA Holyoke
- 011 MA Springfield
- 012 MA Pittsfield
- 013 MA Greenfield

Countries

- [-- ALL --]
- CANADA
- United Kingdom
- UNITED STATES

Library Private Folders Access

Private Root Folders

- [-- ALL --]
- 2March test folder private templates
- NEW NEW fancy folder private template

Has Access To:

Add >>

<< Remove

Reports

Available Reports

- Custom Reports
- Marketing Activities Report
- Sales Opportunity Reports
- Recurring Revenue Pipeline Report
- Opportunity Forecast Report
- Opportunity Forecast Update
- Opportunity Highlight Report

Buttons: Add >>, << Remove

Has Access To: [- ALL -]

Email Template Private Folders Access

Private Folders

- [- ALL -]
- Corporate - Legal Email Templates
- Corporate - Internal Memos
- Sales - Channel Program Emails

Buttons: Add >>, << Remove

Group/Partner Access [Should be used only for User Type = Administrator]

Group

- [- ALL -]
- Atlantic
- Pacific

Partner

- [- ALL -]
- Computer Mart
- Master Widgets

OR

Account Manager

- [- ALL -]
- Kathleen Adams
- Carolyn Evans
- Tyler Smith
- Mark Zaia

Partner Rep

- [- ALL -]
- Carolyn Evans
- Jean Pepin
- John Sanders

* Note: Selecting Account Manager or Partner Rep will override any selections in Group and Partner.

Buttons: Submit, Cancel

The Set Bulletin Board pull-down establishes what Bulletin Board will be presented to the user when they log into a particular Workgroup via this user logon.

The Label Set pull-down establishes what Label Set will be used for this Logon/Workgroup.

The Campaign/Geography Access function restricts Workgroup access by campaign(s), State(s), Zip code(s) and County(s). Multiple selections can be made by holding down the CTRL key for individual selection or the SHIFT key for range selection.

NOTE → These additional restrictions are usually used only at the Global workgroup level since access at the Group, Acct Mgr, Partner, Partner Rep level are already restricted to only those records assigned to that particular level.

The Library Private Folders Access function allows the user to be set up to view previously set up Private Folders in that Workgroup [this is a function within the Library maintenance options].

The Reports function can be used to explicitly define what reports this logon will be allowed to see for this Workgroup.

The Email Template Print Folder Access function allows the user to be set up to view Email Templates folders that have been set up as private in this Workgroup [this is a function within the Library maintenance options].

The Group/Partner Access function allows for an Admin type logon to be restricted at the Group/Partner or Account Manager/Partner Rep level [this should only be used for User Type = Administrator level logons]. This can be used for the purpose of setting up other level of access such as one that might have access to several Groups such as a regional manager.

After setting up the Security Logon screen the user will be presented with the User Profile screen (also available for existing logons by clicking on the User Settings hyperlink on the Home Page):

The screenshot shows the 'User Profile' configuration page for 'Wendy Johnstone'. It includes the following sections:

- Navigation:** Home, Contacts, Reports, Library, User Settings, Add New Records, Campaigns, Search Archives, Administration, Change Database, Calendar, SEARCH, LOGOUT.
- Application Header:** Your Web-Based CRM Application, Logon List, Privileges, Internal, User Profile, Help Guide.
- User Profile:**
 - Company, Title, Phone, Fax, Mobile, Email (input fields)
 - Address 1, Address 2, City, State:Prov, Zip/Postal Code, Country, Time Zone (dropdowns)
 - Default Page: Company name hyperlink on the search results takes you to: Profile (selected), Full Edit, Sales Update
 - Call Backs/Events: Set Default: Call Backs/Events hyperlink ON (selected), Call Backs/Events hyperlink OFF
 - Filter Call Backs/Events: View only call backs/events set for me (selected), View call backs/events for all records
 - Select Add to Sales Rep Comments/Notes: ON, OFF (selected)
 - Call Backs/Events Email: ON, OFF (selected)
 - Pre-Fill Call Back/Event Time: ON, OFF (selected)
 - Outlook Sync: If a contact is not matched with an existing record during sync: Automatically create a new record with new contact as primary, Save contact to Filing Cabinet (selected)
- Rich Text Editor:** Date Settings (mm/dd/yyyy), Calendar Before/After Hours (5:00 AM to 9:00 PM), Group Calendar Display (All group list names selected), Spell Check (Spell Check ON selected), Spell Check Language (US English selected), Email Signature (Email Signature ON selected).
- Footer:** Submit, Cancel buttons, (max length 1,000 characters)

Key fields on this screen:

- The following fields are for informational purposes only and are not used within the application:
 - Company
 - Title

- Phone
- Fax
- Mobile
- Address 1
- Address 2
- City
- State/Prov
- Zip/Postal Code
- Country
- Email address – this is the email address that the application will use if the user has Email Notification or Express Mail activated.
- Default Page – an individual user can set what screen is used when they click on the company name in the Search Results screen.
- Call Backs/Events Set Default – this determines whether the Call Backs/Events hyperlink appears on the user’s Home Page
- Filter Call Backs/Events – this determines whether the user can view all Call Backs/Events for the records they have access to or just the ones that they have created
- Select Add to Sales Rep Comments/Notes – this determines what the Call Backs/Events are appended to the Sales Rep Comments/Notes field
- Call Backs/Events Email – this determines whether the user will get a auto-email every time that they update a Call Back/Event
- Pre-Fill Call Back/Event Time – this determines whether the Call Back/Event End Time are pre-filled with the same date as the Start Time and ½ hour later
- Outlook Sync – this determines whether a record is to be automatically created when there is no match during the Outlook Sync option or whether it should be put in the File Cabinet for later manual matching by the user [Outlook Sync must be enabled in the user’s logon profile for this to be activated in addition to installation of a special add-on module on the user’s PC]
- Time Zone – this is used by the application to establish the correct user date/time [this is used in many functions with the application including date/timestamping as for displaying the correct date/time in the Call Back/Events function] – the Adjust for daylight savings time add an additional our during the standard daylight savings time period
- Calendar Before/After Hours – this is a special parameter that pertains to a special function within the application for certain users who measure response times for support type activities
- Group Calendar Display – this determines whether all group list names are displayed or only ones with assigned Call Backs/Events
- Spell Check – this determines whether Spell Check in turned ON/OFF
- Spell Check Language – this determines which dictionary is to be used [US or UK]
- Email Signature – this determines whether Email Signature is activated in the send email function from the Contact screen [Send Email must be turned on in the user’s logon profile]