

WiredContact Enterprise: Powerful, flexible and friendly CRM



WiredContact continuously provides software updates to maximize your CRM experience and software performance throughout the year. Some features may need to be enabled, while others may be seamless. Contact your WiredContact provider to learn more about incorporating the released features into your WiredContact site!

Features released 1ST Quarter 2013:

- **Version 6 Release: New Quote Module with “Dynamic Search & Populate” function** – this new feature is ideal for configuring Quotes with multiple line items. First load and store your custom Quote information, such as part numbers, product descriptions, pricing and volume levels, in the provided price list Utility. Then within the Quote Module, you can dynamically search on any of those fields to find the specific item you want. Upon clicking your selection, it automatically populates the grid with the multiple fields associated with that item to build your Quote. Perfect feature for configuring a complex Quote with multiple parts.
- **Email Alarms** – receive an email notification to remind you of a call, meeting or to-do at a specified lead time prior to your activity. Simply click the specified email alarm when scheduling your activity.
- **Automatic Scheduling of Activities based on dates (i.e. expirations, birthdays, anniversaries, etc.)** – never miss an approaching deadline again. Schedule automatic activities to remind you of upcoming birthdays, anniversaries or deadlines. Works with any field that is managed with a date.
- **Trigger an Automatic process** – Without end-user interaction, WiredContact can send an email, schedule an activity or Add/Update records based on database values. For example, when a new contact is added to the database with an ID/Status of “Prospect”, a follow up activity can automatically be scheduled and appear on the user’s TaskList/Calendar in “x” number of days.
- **Edit/Replace Enhancements:** Use the Advanced Function option to evenly distribute Record Manager assignments or values to a single field for the lookup. Useful for Territory Realignment when splitting the lookup results between two or more users.
- **Browser updates**

The following user-friendly features have been released within the last year:

- **Export of reports into Excel** – users can select the fields they want to export. Users can select fields from the contact views as well as other tabs, including custom tables (history, activities, sales, etc.).
- **Custom report templates** – Users can create their own reports from Wizards. The Wizard Template is saved for that user for future use in the Personal Library under “My Report Templates”.

- **iPad & Tablet compatibility with the online version** – the online view will automatically re-size to format for the iPad or Tablet.
- **Optimization of display on iPhones and Android smart phones**
- **New updated blue graphics** (sample at <http://demos.wiredcontact.com>)
- **Enhanced HTML Editor** – a more user-friendly HTML editor for email and letter writing, with all the bells and whistles for formatting and inserting links, images and tables.
- **iMessage chat for WiredContact** – enable message chat so online WiredContact users can communicate with each other.
- **Highlight Keywords** - When performing keyword searches, your keyword is highlighted with in the Lookup results.
- **Improved performance for Libraries and Query** - Improved Query function performance for databases with a large number of fields.
- **Duplicate check when entering or displaying a record** – When entering a new contact, a duplicate check can be enabled to key in on your designated field(s) to determine if this contact could be a potential dupe. Users are then prompted with a potential duplicate message, or are asked if they want to merge records. This can be enabled for viewing contacts as well.
- **Schedule activities with 2 or more users** – users can schedule joint activities with their fellow users and the activity will appear on both users' tasklist / calendars.
- **More options on User settings** – User's can select their desired default timeframe for the Task List.
- **Enhanced System Reports** – detailed User reports to see when user's last logged in and view the User Security for each using.
- **Enhanced Customer Portal functionality** – The portal function allows you to setup a site where your customers may view/update their own record information in the WiredContact database. Additionally, customers can add information, like history items, notes, or other information like work orders or other types of requests.

The WiredContact Advantage

WiredContact has been delivering CRM solutions to companies all over the world for over 15 years. Thousands of people from all type of companies rely on WiredContact daily to manage their sales and overall business. The WiredContact team brings a wealth of experience and know how, providing its customers with an application built with continuity in its design and architecture as well as a very good understanding of the functional requirements needed for ease of use.



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