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WiredContact Enterprise – CRM Delivered Your Way

Below is an overview listing some of WiredContact's standard features by function. WiredContact is a highly customizable solution. This checklist provides some guidelines on available functionality and does *not* include all of WiredContact's comprehensive capabilities and features.

Product Overview

- Cloud-based CRM works with any Computer Platform or Device
  - Use on PC's, MAC's, Tablets, iPhones, Androids
  - Mobile Enterprise version *included* with WiredContact license
- Host in WiredContact's Cloud managed by WiredContact's CRM experts or opt to self-host on your company server
- Comprehensive Browser-based Administration Tool
  - Open architecture to add tables, link tables, add fields, drop down options
  - SQL browser included, plus use with standard diagnostic tools
  - Configure User profiles, notifications, automatic triggers, localized settings
  - Comprehensive Import utilities – add new records, append information
- Flexible interface to customize views, work flows, hyperlinks, associations, images
- Open database architecture allows integration with external sources

User Friendly / Easy Navigation

- ✓ Works on any platform or device with internet connection – no sync
- ✓ Exploding views allow Users to see more information when on List pages (Lookup, Task List)
- ✓ Auto save information – no submit button when adding Company/Contact details
- ✓ Modify work flow to needs or different users
- ✓ Duplicate finder and duplicate notification when adding new Company/Contacts
- ✓ Delete log available to undo deleted records in completion, if necessary
- ✓ Users with permissions can perform Admin-like functions, i.e. modify dropdowns, perform global edit/replace, delete Lookups, Imports, etc.
- ✓ Built-in Chat messaging with Users
- ✓ Customer Portal Software included: password protected to share / update selected information
- ✓ Comprehensive use of Ajax for partial page updates as well as database communication

Comprehensive Task Automation

✓ Create "Smart Tasks" based on actions within the database
✓ Automatic report distribution, including users not in the database
✓ E-mail alerts when new leads entered into database
✓ Automatic scheduling of activities based on value or action that takes place, i.e follow up call scheduled for new leads
✓ Reminders of past due activities or sales opportunities
✓ Hands-free record updates based on record changes
✓ E-mail alerts and updates based on database changes (i.e. customer changed from Lead to Customer, or Won opportunity)
✓ Unattended imports and exports

Dynamic User Security Options

✓ Assign User security to limit access to records or fields – by account owner, team or field values ▪ Abililty to assign read only access ▪ Restrict type of reports that can generated
✓ Define User security permissions by table – also applies to new tables added
✓ Field level security – create profiles with different field views and assign to each table
✓ Assign features, options and permissions by user (deletes, edit/replace, mass email, etc.)
✓ Users have PINs to modify own passwords, change views upon Login, manage Email signatures
✓ Define different web views / layouts based on user, security options and/or custom variables
✓ Easy Admin utilities for creating and assigning users, teams, security and permissions
✓ Complete User profile with values that are assigned to each record for reporting, searches, etc.

Flexible Customizations

✓	Add unlimited new tables, fields, views and tabs
✓	Create custom fields and activity types to default tables
✓	Table wizard to easily link tables (entities) and sub-tables (sub-entities) together
✓	Easily integrate other applications with external data sources
✓	Create automatic triggers to change field values, send email or record to history
✓	Add calculations, hyperlinks, check boxes, radio buttons and other field types
✓	Create your own look and feel with custom icons, images and colors
✓	Create Company-centric views and other non-contact based entity (main) records
✓	Easily modify Table defaults
✓	Link fields for easy associations & display data from other records
✓	Post custom messages to Users on Login screen

Managing Account/Contact Details

✓ Track unlimited profile fields on Account/Contact views:

- Create custom fields & tabs to track Company/Contact details to search on
- Show/hide options – click "more" to see hidden fields. Can also have more fields display when specific values added
- Multiple options for dropdown lists (locked, open, multiple entries, add, edit, etc.)
- Different layout views for different types of records (i.e. Prospect vs Customer)
- Auto fill fields – easily link records together
- Create alerts based on custom business rules
- Create messages on Account/Contact page based on values (ie. Top 100 customer)
- Create automatic custom group tab (Collection) to display similar informationall contacts at a Company; all Customers belonging to a 3rd party, etc.

✓ Views can be Company-centric with drill downs or Contact-centric with auto display of grouping Company information.

✓ Company tab displays all contacts at same account that is being viewed:

- Reps add contacts to the same account with an icon that duplicates primary information
- Reps view other contacts at same company with a link

✓ Pictures can be uploaded and displayed on Contact records.

✓ Important fields when changed, values can be set to record to history (i.e. ID/Status)

✓	Maps and direction icons when visible on a contact
✓	Field label links provide shortcut Lookups to see all contacts that have the same value
✓	If Company name changes, sync field in background updates all records with same company name
✓	Undo button records last 100 transactions can undo values mistakenly added to Company/Contact fields
✓	Auto save information – no need to click "submit" or "Save button"

Lookup / Search Capabilities

✓	Use Lookup Wizard to Perform Lookups on multiple using multiple operators
✓	From Lookup results, update information in-line and automatically saves to record.
✓	From Lookup results, see Sales Opportunities, History, Company details and activities in Lookup view by expanding icons
✓	Undo button – recall your last 100 changes and click "undo" to change back information
✓	Add to Lookup / Narrow Lookup / Or options available
✓	Tag / Untag Lookup results to Omit or select records to be viewed from Lookup results
✓	Show/Hide menu for easy navigation; recall previous records, lookups and User options
✓	Create custom links for quick lookups from Lookup page or Navigation Menu
✓	Drop downs with type ahead on up to 3 characters; click enter to add to field views
✓	Customize Lookup results to display columns of your choice and add columns
✓	Recall previous Lookups with shortcut links; Saved searches for most often used Lookups
✓	Create & save advanced queries
✓	Perform Lookups on Sales, History & Activities (or any custom table!) using several variables
✓	Manage information with dynamic Collections – a flexible way to group like contacts together
✓	Save Lookups to a Group
✓	Recall previous Lookups and most frequently used Searches
✓	Edit/replace multiple fields to a Lookup; Append and remove specific items when multiple values
✓	Quick links provide ability to search on all records with no touchpoint in specific timeframe
✓	Ability to download contacts to CSV file from the Lookup results (can be suppressed)
✓	View records by Company (or main entity) and see associated contacts
✓	Attach documents to records
✓	Reps with the appropriate User permissions can delete a single contact or delete a Lookup

✓	Filter history on record by user, dates, subject, regarding & number of items
✓	Global Public Library – easily find files for email attachments and reference
✓	Users have ability to merge contacts
✓	Users can be assigned to import files from Excel, CSV or other database sources
✓	Personal library to store files and reports; access on any computer
✓	Record history item to multiple records in a Lookup

Sales Opportunity/Pipeline Management

✓	Create unlimited fields to manage opportunities, including calculations
✓	Tab displays, open, won and lost opportunities per contact / account
✓	Menu links to easily see all Open, Won & Lost Opportunities, by Rep, by Region, by Company
✓	Triggers can be set to notify of past Forecast close dates and other critical information
✓	Scheduled automatic Sales Pipeline reports to be emailed regularly to reps and Management
✓	Sales Lookups – search sales info and see other pertinent information
✓	Many template Sales reports – quick links with pre-defined scoping dates and criteria ▪ Reports can be exported or available in readable format
✓	Create custom Sales reports to Export
✓	Target specific scoping criteria by sales, company and contact information

Task / Calendar Management

✓	Shared or Individual Task List & Calendar based on User options
✓	Schedule activities with Multiple contacts and Multiple users
✓	Perform a Lookup of the Task list to navigate all activities easily
✓	Filter Task list with custom fields; display information from any field on Task List
•	Activity Pop up alarms and activity email alert
•	Enable email alarm reminders
•	Activities can automatically be scheduled based on values in a field and/or actions in the database. (i.e. New lead entered and WiredContact automatically schedules follow up activity in “x” days)
✓	Schedule activities to a Lookup
✓	Modify activity details without going to the Reschedule dialog, calendar or contact
✓	Use Rollover icon to re-assign Tasks

✓ See past due activities flagged in another color
✓ User can set Task List as their "Start Page" for when logging in
✓ "Exploding" views on Task list enable rep to view Contact details, last history items, Sales opps and other upcoming Activities
✓ Automated reports can be emailed as reminders with lists of Overdue activities

Recording Daily Sales Activities to History

✓ View all interactions with a Company/Contact on the History tab: • Displays all activity types, calls, meetings, to-dos when cleared from a scheduled activity • Reps can record "unscheduled activity" and have it displayed in History • If e-mail sent through WC, email recorded (and letters) generated through the system. • E-mail sync with wceOutlook addon displays e-mails • Sales opportunities won or lost are also recorded. • Field changes on assigned fields will be displayed in history
✓ Quick Links to easily record meetings, calls completed, etc.
✓ View all interactions from all Contacts at a Company on the "Company History Tab"
✓ History Lookup wizard to search History information on any field on the History table
✓ History filter available to find specific items in History for that Contact
✓ Call Reports (History Reports) available on Reports view or emailed to rep/Management daily/weekly/monthly per their request

Communications Capabilities

✓ Custom signatures with logo on outgoing emails from WiredContact
✓ Pre-defined HTML and Plain Text Email Merge Templates
✓ Broadcast e-mail capabilities (permission based option) – auto recorded to history
✓ Opt out feature automatically updates database with preferences
✓ Mail merge letters, labels and envelopes to a Lookup or group
✓ Seamless integration with Constant Contact to easily upload lists and track Campaign results

Powerful Reporting
✓ Multiple canned Template reports for History, Activities, Sales Opportunities and Contacts/Accounts • Quick links for various scoping dates and most frequently used reporting criteria
✓ Unlimited reporting – add fields, columns, calculations, summaries, counts, totals
✓ Report Wizards make it easy to select scoping criteria • Wizards saved future use under their "My Report Templates"
✓ Automate reports to be distributed via e-mail on regular basis. • Users can schedule reports as well as Administrators
✓ Reports formatted in readable HTML or Exported to Excel, CSV or Text file
✓ Reports are "actionable" with a link to navigate to record in database
✓ Users can create custom export reports and save data to CSV file with Wizard (select fields they want to export and criteria)
✓ Ability to save report results to a Lookup
✓ Unattended exports and imports can be scheduled

Library
✓ Public Library: repository to post documents for easy access for Users
✓ Frequently used Documents uploaded for easy access to outgoing e-mail or reference
✓ Assign users to add/delete to public library
✓ Personal Library stores Reports, Report Templates, E-mail templates and documents unique to that user

Web Lead Capture Form
• Lead Capture / Web response form to capture visitors from your web site
• E-mail alert forwarded to respective representatives advising of new lead
✓ Default values added to lead form automatically based on criteria
✓ Link available on the Menu and Lookup view to easily find/navigate new leads
✓ Lead Reports automatically e-mailed with # of leads submitted and disposition