



# Cordell<sup>®</sup> Connect loaded with Features that turn into Benefits for you

March 2006

The new Feature is...	And the Benefit to you is...
<b>Assigning Tasks in bulk</b>	While creating a task, more than one user can be assigned at the same time. Great for time saving, as well task sharing.
Improved Wildcard function	No need to remember to include the % symbol. The wildcard is now embedded automatically so you simply enter the word/name you want to find and Connect will search for records beginning with, ending with or containing that word or name.
ACT listed separately	Be more accurate with mail merges, labels etc, because companies and projects located in the ACT are now listed separately to NSW.
Improved Project/ Company/Contact location search	New screen layout for state, council and postcode searches will assist you with easier selection on these screens.
Enhanced Project category descriptions	Project categories are described in full in the project search screen, better enabling you to perform more tailored, precise queries.
Simplified date selection	Dates can be typed in (ie 01/01/2006) or selected from an easy to use calendar. Also, the pre-defined date range (i.e. 1 week, 1 month etc) for the Update Date makes searching for Projects faster than ever before.
Share notes and tasks (for users with Management Console)	Not only can you transfer notes and tasks to other users, but now you can also copy (share) notes and tasks from one user to another. This saves time and re-entry if more than one user is tracking a certain project, and it also means notes and tasks can be easily re-assigned if a user leaves your company.
Total Projects Value (\$'s) shown on Company detail screen	The estimated values of projects won by a company are totalled in the Company Detail screen, enabling you to instantly see the value of work won by that company.
Transfer tasks to MS Outlook in bulk	Save time by transferring tasks from Connect to Outlook in bulk rather than one at a time. You can transfer tasks to either the Outlook task list or the Outlook Calendar.
Transfer Contact details to MS Outlook in bulk	Save time by transferring Contacts to Outlook in bulk rather than one at a time.
Save Cross Searches	Users can save Cross Searches, saving the time and effort of re-creating more comprehensive queries.
Tender Calendar includes user-entered Projects (My Projects)	Any user-entered project with a tender date will appear on the Tender Calendar automatically.
Search on tasks	Isolate tasks quickly and easily by searching on task subject, task content, task due date, or by the person who assigned the task.
Change Password option	A user's password can be changed within Connect at any time, ensuring added security, especially if a user leaves your company.
One user log-in at a time	A username can only be used by one user at any one time, enabling added security, especially in the case of a user leaving your company, and also preventing unnecessary overload on the system.
Essential Settings prompt	Users are prompted in the log-in screen if any of their browser settings are not correct. By following the simple instructions for fixing the setting, the user will be able to start using Connect immediately, without the need to call Customer Support.
Multiple Company Name Search	Users can now search by multiple company names at once (or just partial names, as a wild card is already embedded within Connect).
'Templates' for customisable Export to Excel report option	Once a user specifies fields for exporting project or company details to Excel, the selection will be saved automatically for future use.
Project Title Information	On the project list, each project title is now displayed together with its project type, giving users detailed information at a glance, before opening the project itself.
Modify Date for Status Field	As soon as a project is activated, the date/time information will be captured. The newly introduced Modify Date field will display the date/time accordingly with any Status change. In addition, users can now better describe own Status in free-text Status Detail text field.

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<b>Overdue task reminder</b>	You will never miss another task deadline, because you'll be reminded tasks due today and overdue tasks as soon as you log-in to Cordell Connect.
<b>Home page statistics</b>	See in easily understood, graphical terms how many new projects, updates to projects and new tenders have been entered in Connect since you last logged in.
<b>Search by 'unread' projects</b>	Searching only the projects that you've never looked at before will save you time as you don't need to scroll through previously viewed projects.
<b>Last Search saved</b>	After running an ad-hoc search on the project screen, the system automatically saves the last search for your convenience.
<b>Search by Commence and Completion dates</b>	Now you can easily search for projects by estimated construction commence or completion date.
<b>Favourite Searches</b>	Run frequently used queries conveniently from the Home page.
<b>Activate Projects in bulk</b> (for users with Management Console permission)	Activating/selecting projects for other users to follow up will save time and allows the manager to have direct control over identified project leads being tracked.
<b>Customise screen layout/view</b>	By removing or adding specific fields, pre-defining the sort order of projects, and by stipulating the number of records that will appear per page, users can adjust the way project lists appear.
<b>Mail merge for multiple projects</b>	Users can now mail merge projects in bulk by using the new Role Filter, which saves time and allows you to track your communications effectively.
<b>Last Update Date Information</b>	Any project in a list has a Date Stamp assigned (last update date) – this field can be easily added or removed from the view when required.
<b>Graphics for Projects list</b>	Any project search result can now be analysed by various criteria including state, category, stage, ownership or value, and displayed in graphical form (bar or pie charts).
<b>Email address icon</b>	An envelope icon appearing next to a company or contact name enables you to quickly and easily isolate the records that contain email addresses, and then you can click on the icon to create an email (using MS Outlook).
<b>Transfer Company details to MS Outlook</b>	Now you can send Company details to Outlook with the click of a mouse.
<b>'Top Companies' Report</b>	Users can quickly and easily produce a report showing the top 10, 20, 50 or 100 companies in a particular role (or combination of roles) for a particular state (or combination of states) based on projects won over the past 1, 3, 6 or 12 months.
<b>Email in bulk</b>	If you like mail merging in bulk, you'll love this new feature - users can now email in bulk directly from Connect (through MS Outlook).
<b>Export Companies list to MS Excel</b>	In the same way as a Projects list can be exported to Excel, now a Companies list has the same facility with choices of project or contact details. Enables you to easily export relevant data for a range of purposes.
<b>Tender Search</b>	From the company search, you are just a click away from getting a list of tenders bidding for a specific type of projects.
<b>Email notification</b>	Choose to receive notification via email when an active project or a project linked to an active company is updated, as well as when tasks are due or overdue, or when a task has been assigned to you. Great for people who can access their email via a Blackberry or PDA, allowing prompt follow-up.
<b>Forgot Password request</b>	A user can have their password reset and emailed to them if they forget it. This gives greater flexibility to the user because they no longer need to contact our Customer Support team if they have forgotten their password.
<b>View subscription details</b>	A user can view the data selection matching their subscription profile (and users with Management Console rights can view subscription details for all users in their control).
<b>New Options for Saved Queries</b>	While setting up your project queries, you can now decide if the search results should show unseen projects only or all relevant projects.

**Note:** Features highlighted in bold red text are major enhancements to Cordell Connect.