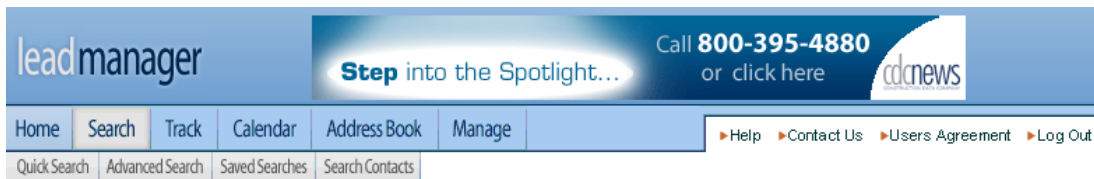


New Lead Manager Features How-To-Guide – June 2011

NEW Lead Manager Toolbar:



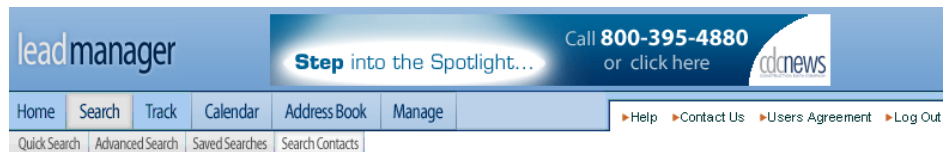
The new Lead Manager toolbar is now divided into easy-to-use tabs:
Home | Search | Track | Calendar | Address Book | Manage



All of the items previously contained in Search Project News are now available on the Search tab on the Lead Manager toolbar with Search Contacts having a new enhanced

Contact Search

- Quick Search
- Advanced Search
- Saved Searches
- **NEW** Enhanced



Contact Search
Contact Saved Searches
Contact Tracker

Please enter any field with an asterisk (*) to start search.

*Company Name:

*State
State
Alberta
Alaska
Alabama
Arkansas

* Contact Type Contact Sub Type

Contact added on project:

Keyword: [Search Tips](#)

*Zip Code:

Distance: ☒ Exact Zip ☐ 5 ☐ 10 ☐ 20 ☐ 50 ☐ 100 Miles

- You may enter any field with an asterisk (*) on the Contact Search form to perform a new enhanced **Contact Search**
- Search by any one or combination of: *Company Name, *State, *Contact Type, Contact Subtype, Activity (Contacts added on project by date range), Keyword, *Zip Code or Radial Distance from specific Zip Code.
- Click **SEARCH** to search contacts by the parameters entered without saving as a Contact Saved Search
- Click **SAVE** to save the search as a Contact Saved Search
- Enter a title for the Contact Saved Search in the form on the page which opens and click **SAVE**. NOTE: avoid using an apostrophe or quotes (',") in search name.

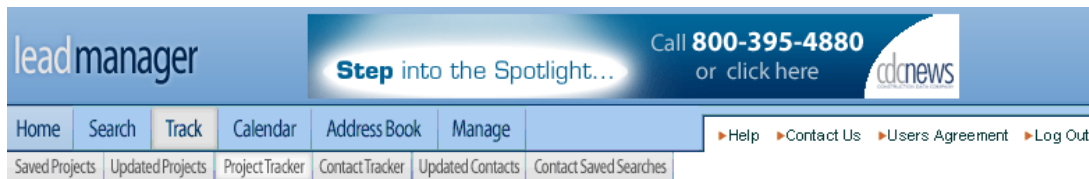
Name of Contact Search

Please avoid apostrophe and quotes(",) in search name.

Track

Formerly

Project Tracker



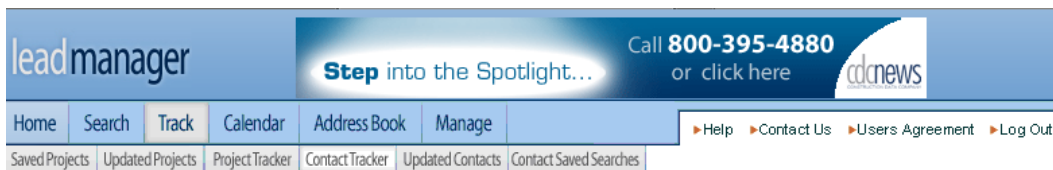
All of the items previously contained in Project Tracker and now available on the Track tab include:

- Saved Projects
- Updated Projects
- Project Tracker

NEW items on the Track tab include:

NEW

ContactTracker





| Contact Search | Contact Saved Searches | Contact Tracker |
|---|------------------------|------------------------|
| <p>Listed below are the contacts you have tracked in your Contact Tracker.</p> <p>Click "View" in View Profile to display a contact's profile. Click "Edit" to change the email option for a tracked contact. Click "Delete" to remove a contact from Contact Tracker. Click "View" in View Projects to view all projects where a contact is listed.</p> | | |
| Contact Company Name | View Profile | Edit Del View Projects |
| Cummings Inc.;James A | | View Edit Delete View |

When linking to a contact from project details a contact can be added to Contact Tracker by:

- Clicking the [View Profile](#) link then clicking the  icon

When reviewing Contact Search results a contact can be added to Contact Tracker by:

- Clicking the  icon in the Profile column and following the step above OR
- Clicking the  icon in the Contact Tracker column
- Enter your email in the window which opens to track contact. To receive update emails click **SAVE** **OR** check the “Do not send email” box if you do not want update emails.

Contact Tracker

Enter your email to track when contact profile is updated or added to projects.
Check "Do not send email" if you do not wish to receive email notifications.

Email:

☐ Do not send email.

SAVE

- Contact is added to Contact Tracker and if “Do not send email” was not selected, you will receive an email when any of the following occur for the contact:
 1. When a contact is added to any project
 2. Contact phone number changed
 3. Contact fax number changed
 4. Contact address changed
 5. Contact website changed
 6. Contact email changed

NEW Updated Contacts

When a contact is tracked in Contact Tracker if any of the six (6) updates listed above occur an email notification is sent to the email address entered when the contact was tracked.

To view updated contacts go to  then click 

- If you have contacts which have updates the following is displayed:

leadmanager

Step into the Spotlight... Call **800-395-4880** or click here 





[Home](#) [Search](#) [Track](#) [Calendar](#) [Address Book](#) [Manage](#) [Help](#) [Contact Us](#) [Users Agreement](#) [Log Out](#)

[Saved Projects](#) [Updated Projects](#) [Project Tracker](#) [Contact Tracker](#) [Updated Contacts](#) [Contact Saved Searches](#)

[Contact Search](#) [Contact Saved Searches](#) [Updated Contacts](#)

Listed below are your contacts which have updated since your last login.

Click "View" in Added-To Projects to display projects the contact was added-to.
If there are no projects displayed the contact's profile was updated.
Click "View" in View Profile to view the contact's updated profile.

| Contact Company Name | View Profile | Added-To Projects |
|-------------------------------|---|---|
| 7 Eleven Corporation (Dallas) |  |  |
| Darden Restaurant Group |  |  |

- If none of your tracked contacts were updated the following message is displayed:

[Contact Search](#) [Contact Saved Searches](#) [Updated Contacts](#)

Updated Contacts will list any of your tracked contacts that have updated information.




There are no updated contacts currently.

- If you do not have any contacts tracked in your Contact Tracker the following message is displayed:




| Contact Search | Contact Saved Searches | Updated Contacts |
|---|------------------------|------------------|
| <p>This area stores your contact tracker, click here to conduct a contact search.</p> | | |

NEW Contact Saved Searches

| leadmanager | | Step into the Spotlight... | | Call 800-395-4880 or click here | | cdnews | |
|----------------|------------------|----------------------------|-----------------|---------------------------------|------------------------|--------|--|
| Home | Search | Track | Calendar | Address Book | Manage | | |
| Saved Projects | Updated Projects | Project Tracker | Contact Tracker | Updated Contacts | Contact Saved Searches | | |


| Contact Search | Contact Saved Searches | Contact Tracker |
|--|---|---|
| <p>Listed below are your Contact Saved Searches. Click Edit to view/edit the criteria of a search. Click Saved Search button to run a saved search. Click Delete to remove a saved search.</p> | | |
| Contact Search Name | Run Saved Search | Edit Del |
| FL-Orlando-OCs |  |   |

Contact Saved Searches is where contact searches are saved when **SAVE** is clicked. Refer to how to save a Contact Search above.

- Click  button to Run the Contact Saved Search
- Click  icon to Edit the Contact Saved Search criteria
- Click  icon to Delete the Contact Saved Search

Calendar

| leadmanager | | Step into the Spotlight... | | Call 800-395-4880 or click here | | cdnews | |
|-------------|--------|----------------------------|----------|---|--------|--------|--|
| Home | Search | Track | Calendar | Address Book | Manage | | |
| | | | | Help Contact Us Users Agreement Log Out | | | |

| My Events |
|---|
| <p>This area stores your today's events, click here to create your own events.</p> <p></p> |

| My Event Calendar | | | | | | |
|---|-----|-----|-----|-----|-----|-----|
| Wednesday | | | | | | |
| May 18, 2011 | | | | | | |
| ◀ LAST YEAR ◀ LAST MONTH NEXT MONTH ▶ NEXT YEAR ▶ | | | | | | |
| Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec | | | | | | |
| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | | | | |




- **Address Book** (NOTE: opens on a new tab in browser)

CDCNews Address Book

[Step-By-Step Instructions](#)
[Troubleshooting Contact Import](#)

MY CONTACTS **MY GROUPS** **CONTACT IMPORT**
[+ Create-Add New](#) [- Create-Edit](#) [> With Plaxo](#)

Filter By Group: [unassigned]


| Contact Name | Company Name | Email Address | Group By | Profile | Edit | Delete |
|-------------------------|-------------------------|-------------------------|----------|---|---|---|
| Darden Restaurant Group | Darden Restaurant Group | construction@darden.com | |  |  |  |
| | Darden Restaurants | construction@darden.com | |  |  |  |

EXPORT TO EXCEL


Create/Add New Contact

- 1) Click **MY CONTACTS** [+ Create-Add New](#)
- 2) **Select** Group (refer to My Groups section below for additional information)
- 3) **Enter** contact information
- 4) Click **ADD**

Edit/Update Contact

- 1) Click  beside the contact you want to update
- 2) **Edit** or **Add** updated or additional contact information
- 3) Click **UPDATE**

Delete Contact

- 1) Click  beside the contact you want to remove
- 2) Click **DELETE** to confirm you want to delete the contact record
- 3) Click **CANCEL** to prevent the contact record from being deleted

MY GROUPS

Create/Edit Group

- 1) Click **MY GROUPS** [- Create-Edit](#)
- 2) **Enter** New Group Name
- 3) Click **ADD**

Edit/Update Group Name

- 1) Click [Edit](#) beside the Group Name you wish to update
- 2) **Edit** Group Name
- 3) Click **UPDATE** to change Group Name
- 4) Click **CANCEL** to prevent the Group Name from being changed

Delete Group

- 1) Click Delete beside Group Name you wish to remove

NOTE: DELETE IS UN-REVERSIBLE AND WILL REMOVE THE GROUP FROM YOUR GROUP LIST AND THE GROUP FROM ANY CONTACT(S) YOU HAD ASSIGNED TO IT!

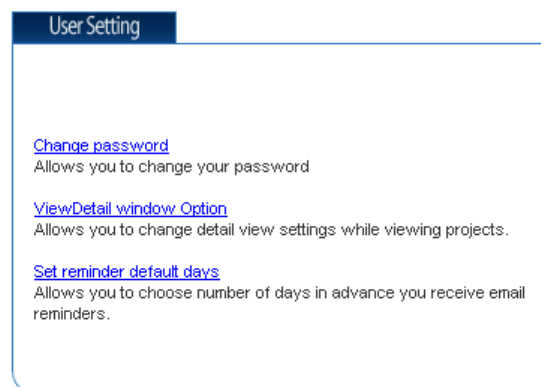
NEW CONTACT IMPORT

NOTE: Your CDCNews Address Book is confidential and only viewable by you.

- 1) **Click** [CONTACT IMPORT](#) [With Plaxo](#)
- 2) **Select** where your contacts are saved
NOTE: This will enable you to copy your external contacts into your **CDCNews** Address Book
- 3) **Click** the yellow message bar to download the required Active X.
- 4) **Click** on the folder that contains your contacts. Either select the box(es) next to each contact you want added to your **CDCNews** Address Book, OR click 'Select All' to import all your contacts
- 5) **Click** Next. It will read: "these are the contact you have selected"
- 6) **Click** Done
NOTE: The contacts you selected will appear at the top of your **CDCNews** Address Book
- 7) **Click** Upload to complete the process. All the contacts you selected should now appear in your **CDCNews** Address Book



- **Change Password – Allows you to change your password**
- **View Detail Window Option – Allows you to change detail view settings while viewing projects**
- **Set Reminder Default Days – Allows you to choose number of days in advance you receive email reminders**



Manage

Site Manager

Formerly – Lead Manager Master Account View

User Setting

leadmanager

Step into the Spotlight...

Call 800-395-4880

or click here



Home

Search

Track

Calendar

Address Book

Manage

▶ Help

▶ Contact Us

▶ Users Agreement

▶ Log Out

User Setting

Manage Sub Users

Sub Users Login Report

You have logged in as cdcnews

[Change password](#)

Allows you to change your password

[ViewDetail window Option](#)




Allows you to change detail view settings while viewing projects.

[Set reminder default days](#)

Allows you to choose number of days in advance you receive email reminders.

Manage Sub Users

From this area you can manage your sub user accounts.

- Click  [Add a Sub User](#) to add Sub User account
- Click [Login As](#) to login to Sub User account
- Click  [Edit](#) to edit Sub User account
- Click  [Delete](#) to delete a Sub User account

User Setting

Manage Sub Users

Sub Users Login Report

From this area you can manage your sub user accounts. To Add a sub account, simply click the Add button. To login as, Edit or Delete a sub account, click the appropriate button next to the id of the Sub Account.



[Add a Sub User](#)

| Sub User Account | Login As | Edit | Del | Change Pwd |
|------------------|----------|------|-----|------------|
|------------------|----------|------|-----|------------|

| |
|--------------|
| satpol - s t |
|--------------|

[Login As](#)[Delete](#)[Change Pwd](#)

Sub Users Login Report

User Setting



Manage Sub Users









Sub Users Login Report

Below is the activity of your sub accounts.

| Sub User Account | Last Login | No. of Logins |
|------------------|------------|---------------|
| satpol - s t | 05-11-2011 | 7 |

NEW Project Screener

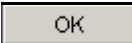



- Click  Screen icon on project listings to screen projects from posting in your New & Updated search results
- Click  icon on project listings to remove projects screened to post again in your New & Updated search results

| Search Results | | | | | | | |
|--------------------------|---------------------------------|--|-----------------------|---------------------------|---|-------------------------|---|
| All | Bid Date/Status | Title | Value | Bid Stage | County/Independent State City | e-plans | View PT PS Print |
| <input type="checkbox"/> | | | | | | | |
| <input type="checkbox"/> | ASAP | HILLCREST HIGH SCHOOL ATHLETIC RENOVATIONS & ADDITIONS | | BIDDING | Greenville Co. SC | |     |
| <input type="checkbox"/> | | KEARNY HS AIRCRAFT NOISE ABATEMENT & RENOVATION - CONSTRUCTION MANAGEMENT SERVICES | | BIDDING | Hudson Co. NJ | |     |

When  Screen is clicked the following alert message is displayed:

Project will be screened from posting in your New & Updated search results!

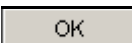


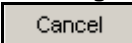

OK Cancel

- Click  to screen project from posting in your New & Updated search results. The  Screen changes to  and will no longer post in your New & Updated search results.
- Click  to prevent project from being screened. The  Screen icon remains unchanged.

When  is clicked the following alert message is displayed:

Project will be removed from Project Screener and will post again in your New & Updated search results!

OK Cancel

- Click  to remove project from being screened from your New & Updated search results. The  changes back to  Screen and will post again in your New & Updated search results.
- Click  to maintain the project of being screened from your New & Updated search results. The  icon remains unchanged.