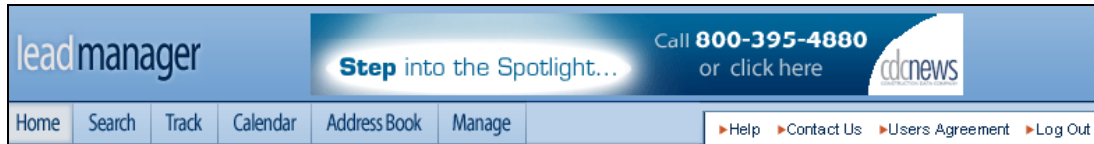
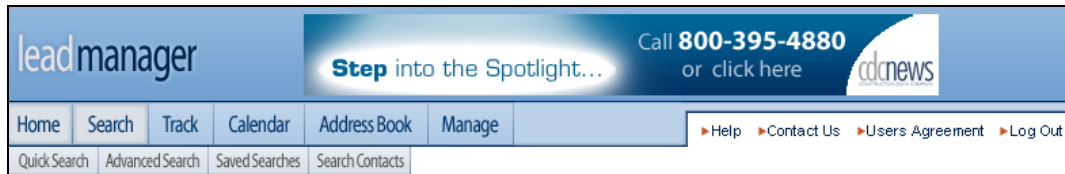


New Lead Manager Features How-To-Guide

NEW Lead Manager Toolbar:

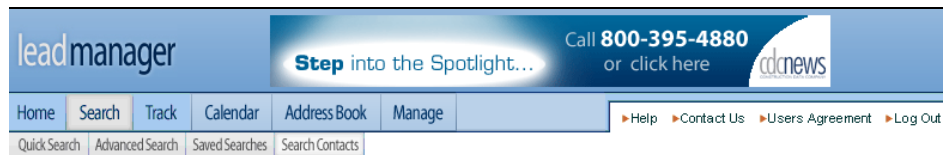


The new Lead Manager toolbar is now divided into easy-to-use tabs:
Home | Search | Track | Calendar | Address Book | Manage



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.

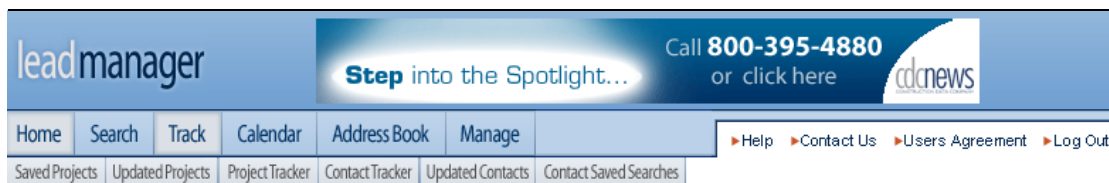
Name of Contact Search

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

Track

Formerly

Project Tracker



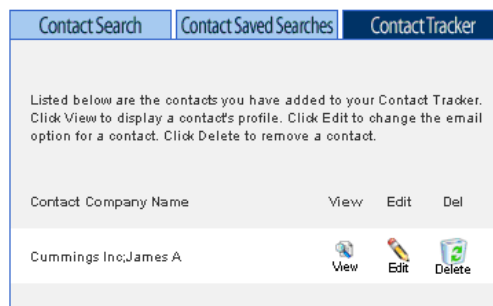
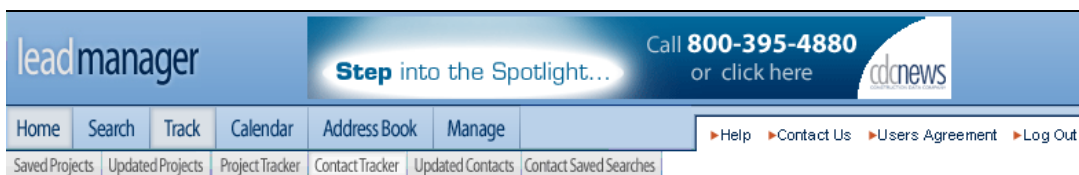
All of the items previously contained in Project Tracker and now available on the Track tab include:

- Saved Projects
- Updated Projects
- Project Tracker

NEW items on the Track tab include:

NEW




Contact Tracker



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 address in the form on the window which opens and click 

Contact Tracker

Enter your email to track contact, you will get updates about this contact via email.

Email:




- Contact is added to Contact Tracker and 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

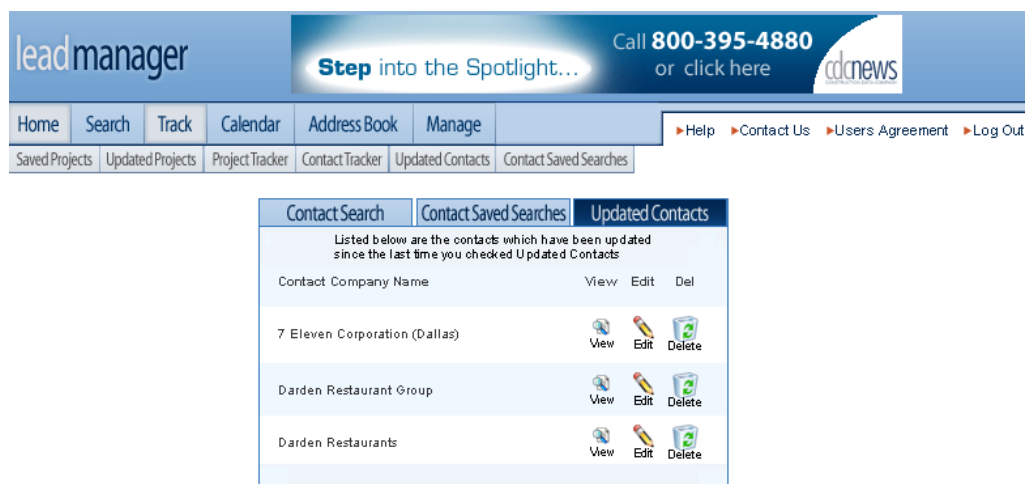
NEW

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 

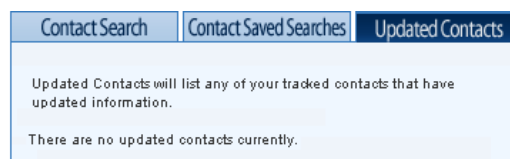
- If you have contacts which have updates the following is displayed:



The screenshot shows the leadmanager web application interface. At the top, there's a navigation bar with 'leadmanager' logo, a 'Step into the Spotlight...' banner, and a contact number '800-395-4880'. Below this is a menu bar with 'Home', 'Search', 'Track', 'Calendar', 'Address Book', and 'Manage'. A secondary menu bar includes 'Saved Projects', 'Updated Projects', 'Project Tracker', 'Contact Tracker', 'Updated Contacts', and 'Contact Saved Searches'. The 'Updated Contacts' section is active, displaying a table of updated contacts. The table has columns for 'Contact Company Name', 'View', 'Edit', and 'Del'. Three contacts are listed: '7 Eleven Corporation (Dallas)', 'Darden Restaurant Group', and 'Darden Restaurants'. Each contact has corresponding 'View', 'Edit', and 'Delete' icons.

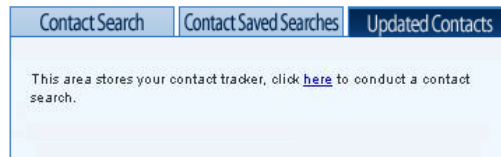
Contact Company Name	View	Edit	Del
7 Eleven Corporation (Dallas)			
Darden Restaurant Group			
Darden Restaurants			

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

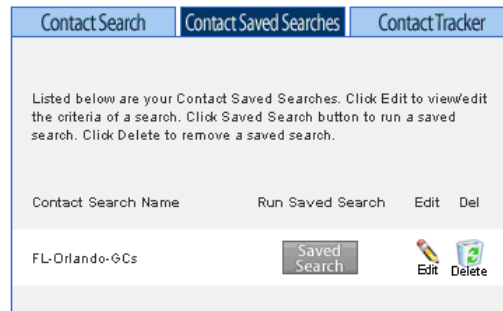
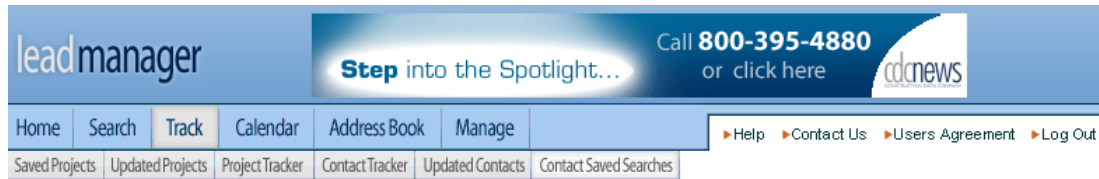


The screenshot shows the 'Updated Contacts' section of the leadmanager web application. It displays a message: 'Updated Contacts will list any of your tracked contacts that have updated information. There are no updated contacts currently.'




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



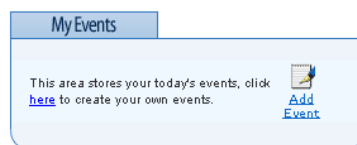
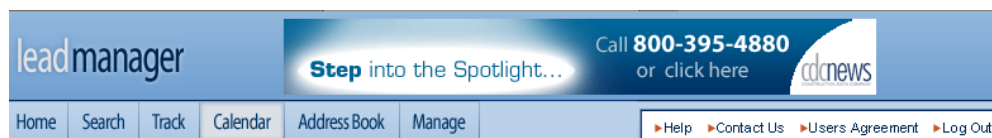
NEW Contact Saved Searches



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



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 + Create-Add New **MY GROUPS** - Create-Edit **CONTACT IMPORT** > 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		 View	 Edit	 Delete
	Darden Restaurants	construction@darden.com		 View	 Edit	 Delete

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

Delete Contact


- 1) Click  **Delete** 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

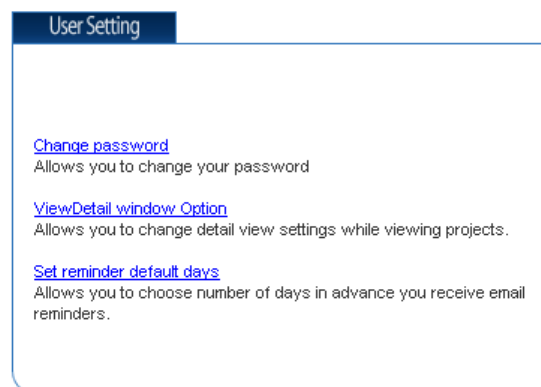
NOTE: Your CDCNews Address Book is confidential and only viewable by you.

- 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



User Setting

- **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 [Site Manager](#) – 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
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satpol - s t

[Login As](#)[Edit](#)[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

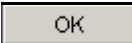




- Click  Screen icon on project listings to screen projects from posting in your New & Updated search results
- Click  icon on project listings to remove projects screened to post again in your New & Updated search results

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!

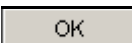


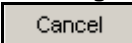

OK Cancel

- 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.