

## New Features in Wintouch CRM – Update 7.0.0.7

1. **View all One Click Reports in one place:** Click Administration > Custom Reports Listing. Only Wintouch Administrators will see all one click reports available in Wintouch CRM. This list includes those reports provided by Touchtone and those developed by your organization.
2. **Add Fields to Activities:** When customers went live with Wintouch, there was a standard set of activity fields and users could not add fields to this list. Customers can now request fields for addition to the Complete and/or Schedule Activity windows.
3. **Latitude and Longitude:** This feature is currently only available to North American users. When the address is completed, filling in the Zip or Postal code also gives users the longitude and latitude of each address.
4. **Simplified Toolbar:** Now users are able to place dividers in the toolbar between icons. This makes the toolbar easier to read when broken into groups of three, five, seven, etc.
5. **Scroll Long Lists:** Tired of arrows pointing to additional columns for long lists? We sure were. Wintouch no longer uses arrows to expand a field that has a large number of options. Users now see a single scrollable list.
6. **Key in dates free you from the mouse:** Hate using the mouse? When entering date information into any date field, simply key in YYYYDDMM and Wintouch will correctly format the date when the “enter” or “return” keys are clicked (the mouse can still be used if preferred).
7. **Want the largest YTD sales information at the top of your report when you run it?** All columns in Wintouch can now be designated as sort columns in lists. This lets users select their preferred sort view and set it as the default whenever that screen is opened or used.
8. **Easily Update Attached Documents:** Attaching documents to activities and extended profiles has been available for quite some time in Wintouch. Now, however, editing these documents is a snap. Just right click on any paper clip icon and open the document. Make the changes and click on the X at the top right of the document to save changes. Then right click on the paper clip icon again and click “Update with Working Copy”. The next time the document is opened, it is the updated version. [The document on your 400 is now updated (amazing)!]
9. **Multi-level Drill Down in Extended Profiles: Want to see Quotes and the line items in the quotes in the same extended profile?** Extended Profiles now can drill down multiple levels and can be broken down into line items. This is useful as a very simple ERP solution with estimates, orders, purchase orders, sample requests, etc. – anything that needs to be viewed in detailed lists. Note: This is not a full ERP replacement but a tool to extend and enhance the usefulness of your current ERP investment.
10. **Enhanced Template Builder:** The Template Builder is most often used for email templates but any type of forms, form letters, etc. can be created with it. Some customers even use it to print out highly formatted Quotes and Invoices. The latest improvements to the Template Builder include inserting hyperlinks, tables, images, non-breaking spaces and tabs (equal to four non-breaking spaces.)
11. **Default Template Settings:** Font, printer, paper size, portrait or landscape, margins
12. **Open Dashboard on Start-Up:** To see Dashboards on Wintouch Start-Up, check the box at the bottom in Main Options > Preferences > Wintouch Options.