

**For Immediate Release****Media Contact:**

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## Touchtone Updates Wintouch<sup>®</sup> eCRM to 6.3

Costa Mesa, CA – November 2, 2004 –Touchtone Corporation, in its continuing commitment to developing native OS/400 software for the IBM iSeries – AS/400, announced the release of Version 6.3 of Wintouch eCRM. Wintouch is a complete CRM solution designed specifically for the iSeries to enable smoother, more cost-effective integration with legacy OS/400 ERP systems and other back-end AS/400 applications and data.

**Some of the new features in Wintouch 6.3 include:**

- **Workflow** – Wintouch administrators can more easily design workflow scripts from within Wintouch without creating an API by using the WorkFlow engine and script designer now included with Wintouch. With this powerful feature, when predetermined criteria are met, the system can automatically notify customers via email, assign tasks to users, or perform a custom set of functions. The Wintouch WorkFlow Script Designer uses OS/400 database triggers. Built-in workflow scripts include Complete an Activity, Schedule an Activity, Send an Email, Create an Extended Profile, and Make an External Call commands.
- **Improved Wintouch Lite Functionality** – Wintouch Lite grants traveling or field employees access to a definable number of accounts from Wintouch while disconnected from the Internet or company Intranet. Accounts are selected using Group Definition from the Options pull-down menu. Wintouch users can define or redefine groups to find specific accounts and/or contacts by region, state, zip code, area code, etc. as the qualifying criteria for a definable number of accounts. This defined group is downloaded in XML format, improving the Wintouch Lite download speed and working performance. End-of-day synchronization has also been simplified – only necessary updates are uploaded when synchronizing with the server. In addition, an Access Log report is now provided on the server for added security for the enterprise.



*We're committed to your CRM success.*

- **Managing Attachments** – Attachments can now be saved, opened or sent by email with a simple right click on the attachment icon. Not only is this available for Word documents but also for PDFs and Excel documents, as well.
- **Organizational Chart** – An Organizational Chart is among several new relationship facilities and charts in Wintouch. Using the Organizational Chart icon on the Account toolbar or on the Contact pull-down will generate an Organizational Chart showing the relationships assigned to different contacts in a given account or accounts – whether customer, prospect, vendor or channel partner, etc. – for all of the contacts logged to that organization in Wintouch. Also featured, is a new Contact-to-Contact chart useful for family relationships in membership organizations.
- **Enhanced Reporting** – Extended Profile and Activity reports more concisely match the selection criteria by using detailed drill-down to individual fields, for example: YTD Sales or Activities such as Collection, Credit Check, New Account, Cold Call, Demo, etc.
- **Search Engine Criteria** – Defining groups using the new “Prompt for Value” check box can specify multiple search criteria at run time. For example, a Sales Manager could search YTD Sales by Sales Rep. Checking the new “Prompt for Value” box when setting up the group would result in a dropdown list of all sales reps just before the report is run. Any searchable field – text or numerical – can be designated “Prompt for Value.”
- **Import Facility Enhancements** – Improved support for data importing including the ability to import personal, as well as, work email addresses, plus enhancements to the graphical user interface used when importing data.

### **About Touchtone Corporation**

Touchtone is a privately held company located in Southern California with over 13 years of expertise on the IBM OS/400 operating system and nine years in the CRM arena. For further information about Wintouch eCRM or Touchtone Corporation, please call (714) 755-2810.