

BULLSEYE Release Notes – 10/3/07

This release contains two major functionality updates to the BULLSEYE platform a Form builder and routing based on user-defined attributes (termed Custom attributes in the system). Both items are aimed at improving the ability of customers to capture and route leads to the appropriate sales organizations. There are also a number of smaller changes and bug fixes in this release.

Form Builder:

- Create and manage any number of lead capture forms. You define what data you want captured, what's required, and the order in which the questions are displayed. Customize the field labels so that they say what you want (great for multi-lingual or international implementations!). Forms may be accessed under the Setup tab and clicking on the Forms button. See detailed instructions later in this document for more guidance.
- Upload a CSS style sheet to make the form match your corporate look and feel.
- Reference forms from anywhere on your site through the placement of some simple Javascript code to display the form in an IFrame or simply reference the form's URL directly.
- Add custom attributes to forms to capture additional information about Leads. Want to track the size of a Lead's company? Add a combo box with whatever range of sizes you want.
- Add routable attributes to forms to handle custom routing schemes to better ensure that a Lead goes to the dealer most likely to convert it to a sale. Do you have dealers who only work with specific kinds of customers? Set up the custom attribute, set the relevant data for the dealers and place the attribute on a form. Leads who match the criteria will get routed to that set of dealers.
- Add an unlimited number of custom fields to your forms. Be careful though, as research shows that the number of people completing forms declines the longer that they are.
- Custom attribute routing operates on the principle of filtering the results that are returned by the general geographic (Radius or Territory) search. If a Lead answers custom attribute questions (Location attributes which are marked as routable) which exactly match the attributes for a given location and which fall into the general routing

BULLSEYE Release Notes – 10/3/07

Other Changes:

- Added 3 new reports: Leads by Dealer, Leads by Status and Dealers by Territory
- Added a link to the Unassigned Leads page to go directly to the Lead Details for that Lead
- Added a new Lead status – ‘Invalid’ to reflect bad leads
- Modified Add Lead page for Client, Rep and Location users to display all custom Lead attributes and all Lead-supplied custom Location attributes on the form.
- Removed form-related options from the Lead Manager Settings section of the Setup tab (these are replaced by the forms generated with the Form Builder)
- Added ability to set a default region for the Store Locator Search page to display (US, Canada or International)
- Canada Store Locator: Added the ability to do a search based only on City and Province data. If no Postal Code is entered, all locations which match the City and State will be returned. No distance calculation will be possible in this case and the Radius dropdown will be disabled until a Postal Code is entered
- Canada Store Locator: Relaxed validation on Canadian postal codes to accept lowercase characters, ‘-’ characters between the first and second parts of the postal code or to have no space between the two parts at all (the former rule was uppercase only with a space between the two elements)
- Fixed a bug with the bulk mailing to Locations feature that was changing absolute path URLs to relative.
- Fixed a bug with bulk mailing to Locations feature that was sending the same login credentials to every user
- Fixed an issue with the Dealer Responsiveness report where Total Leads and Unresponded Leads were being calculated for the total history of the dealer rather than the date range input for the report
- Fixed other miscellaneous bugs

Known Issues:

- When clicking on the Trend by Source and Leads by Status reports, there will be an initial error saying no value for a particular parameter. Please enter the date parameters and the reports will function fine.
- Canadian Postal code validation for Form Builder and for the Add/Edit Location pages remains as tight validation (all caps, space between the two elements of the Postal Code). Validation on the Add Lead page is the same loose validation as on the Store Locator search page.
- Required fields on Forms built with the Form Builder will not show which fields are required. Temporary workaround: edit the field label and add “(required)”.