



Update News

November 2004

Since our last newsletter, we've implemented many new features and expanded our product capabilities. We're pleased to be able to have included many of the items that were discussed at our Innovator's Summit last spring. If you have ideas or suggestions for improving our products and more fully meeting your data storage and collaboration needs, we're delighted to hear from you.

Below is an outline of the major changes and additions. Please feel free to post this document in your organization's Shared Files or e-mail it to your clients or users who may benefit from the information. We're anxious for all users of BlueStep™ products to get the most from Relate™, Connect™, Team™ and HQ™. If you would prefer to share this newsletter from the client care site, the address is www.clientcare@bluestep.net. And if you have any questions about any of the items mentioned, please don't hesitate to contact us and we'll be happy to help you.

New and Updated

New BlueStep™ Partnership with AdvancedMD

In the next few weeks, BlueStep Technologies will be finalizing its partnership with *AdvancedMD*, a company whose comprehensive and robust billing system has been used by medical and non-medical clients throughout the nation. This marries the BlueStep family of products to a highly adaptable billing system designed by business office specialists with years of on-the-job experience. Like BlueStep™ products, *AdvancedMD* is a web-based application, so you need no additional investment in equipment – just a PC and a broadband Internet connection.

You'll find that *AdvancedMD* dovetails seamlessly with the critical functions of HQ™, allowing you to move smoothly from providing services to invoicing accounts. Additionally, *AdvancedMD* billing modules can support transactions accessed through your own Connect™ site and tailored to your organization's needs. If you are interested in adding this powerful new tool to your BlueStep™ Internet arsenal, contact Roy Rasband at rasband@bluestep.net.

BlueStep Data Vault™ - Team™, Connect™, HQ™

We've implemented the use of the WebDAV Internet standard in creating Data Vault™, a network-place storage tool. When files and folders are stored on a remote server, such as those in BlueStep's Shared Files modules, the WebDAV protocol allows users of Windows, Mac or UNIX computers to access these items with the same ease as accessing the desktop on the user's own computer. Data Vault™ increases both the security and availability of any user's files and data, including the convenience of:

- Drag-and-Drop functionality between user's computer and online Shared Files
- Upload and download of multiple files and folders in a single operation
- File and folder locking to prevent simultaneous updates by multiple users
- Easy availability through integration with the user's desktop
- Same online username/password for Data Vault™ access as for BlueStep™ access
- No need to use a browser for direct access of online files

In Team™, Connect™ and HQ™, any file may be posted to Shared Files through an online browse-and-upload procedure. Using Data Vault™ in conjunction with BlueStep Backup™, any file or folder may also be copied to multiple other user-selected locations, including local and remote locations. Additionally, files may be added, accessed, moved, edited and deleted using a drag-and-drop method or other standard keyboard cut-and-paste techniques. See the new document, ♦ **Using BlueStep Data Vault™**, for complete details and the important **Note** below.

BlueStep Backup™

An unparalleled new security and update feature was added with the release of BlueStep Backup™. To protect and store critical digital documents and files, the ideal technological solution is BlueStep Backup™. Built to operate seamlessly with Data Vault™ and Shared Files, BlueStep Backup™ allows you to make an identical copy of files and folders at one location and store them to one or more other locations, including off-site storage via BlueStep's Data Vault™. BlueStep Backup™ provides an easy-to-use backup scheduler, allowing you to 'set it and forget it'. It need only be set up once on your computer and will operate continuously to provide backup security for your files. New files can be added to the backup schedule at any time and any scheduled backups can be easily modified as needed. See the new document, ♦ **Using BlueStep Backup™**, for complete details and the important **Note** below.

Please Note: *There is a minimal additional cost for off-site Data Vault™ storage through BlueStep Backup™, based upon disk space and bandwidth usage. To protect your invaluable critical data with safe, secure, off-site storage, please contact Roy Rasband at rasband@bluestep.net. An addendum can be added to your BlueStep contract outlining the current, substantially reduced rates, which supersede any storage rates listed in your present documentation.*

Team Committees – Team™

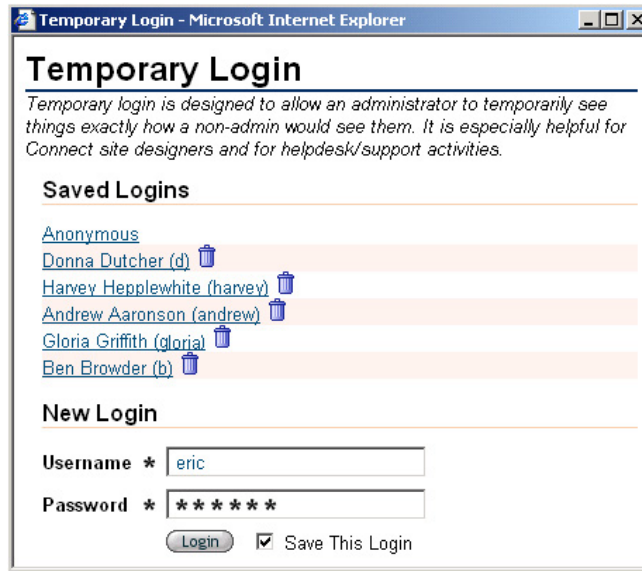
To enhance the effectiveness of your organization and foster improved communication within large Teams, we've implemented a committee-formation feature. A user may create one, two or many committees within any Team, making data sharing and collaboration between members quicker and easier. The committee feature is also a particular timesaver by focusing and streamlining e-mail transactions between committee members. Committees can be created, viewed and members added or removed through the Committees link on the tan navigation bar. Committees are viewable and usable on Team Roster and Team E-mail pages. Committees also function as a security group, so that you may, if desired, assign permissions to sites, documents, etc. based upon committee membership. See the new document, ♦ **Using Team Committees Permissions**, for complete details.

Customizable Team Roster – Team™

The Team Roster now has the expanded capability of displaying not just the name and e-mail of Team Members, but any Relate™ data that administrators would like to provide about members. New ways of formatting the appearance of the three data columns on the roster are also available. Once the look of the roster page has been selected and configured for the desired information, admins have the option of collecting the needed data through a wizard presented to users upon sign-up or the first time they access the Team after the changes are implemented. This is an advanced feature, which is somewhat complex to configure. Instructions for configuration will be available shortly.

Temporary Login - Team™, HQ™, Relate™, Connect™

Administrators (Org Admins, Relate Admins, HQ Admins, Site Admins and Team Leads) now have access to a great new tool for verifying permissions levels and checking the appearance of pages available to individual users within their organization. It is called Temporary Login and is activated through the Tools drop-down on the dashboard. See the example below. It allows an administrator to look at the Teams, sites and organization through the eyes of any user within the system - doing what they can do, seeing what they can see – without canceling their own admin login. See the new document, ♦ **Understanding Permissions**, for complete details.



Variable-Record Report – Connect™

A new feature that allows users to post a selection list in conjunction with a Custom Detail Report is a nifty and convenient way to access and review extensive data from multiple records on a single screen. See the example below. Using two pagelets, users can mount a selection list of individuals or items next to a detail report. With this configuration, any choice made on the selection list results in the chosen detail report about that single individual or item being immediately, dynamically displayed in the associated pagelet on the same screen. This allows you to easily present Relate™ data to non-Relate users in a simple-to-access format, while retaining control of the data through your standard or customized security settings. See the new document, ♦ **Building Variable-Record Reports**, for complete details.

Andrew Aaronson Change Record	Staff Statistics Change Record
All Staff	Print
Aaronson, Andrew	Name: Andrew Aaronson
Guest, Guest	Address: 1234 Aspen Avenue Avard, UT 88888
Jefferson, Grace	Phone: (888) 888-8888
Kelley, Brian	Date Hired: 08/08/2000
Morris, Mary	Birth Date: 08/08/1988
Rasband, Roy	Goals: Working on his doctorate
Roth, David L.	Languages: English, Japanese
Simon, Paula	Spouse: Anna
Young, Dennis	Children: Andrew Jr, Amy, Amelia, Anthony

New Wizard and Report Listings – Relate™





























The record navigator menu (left side navigation) that accompanies all Relate™ records has two extremely valuable additions – Reports and Wizards. Under the Work with This Record section, you may call up pages that list the reports or the wizards that apply to the record category into which this record falls and that have been configured to display with it. To view the report or run the wizard, simply click on the report/wizard name.

Therapy Module Rewritten – HQ™


The Service Plan/Therapy module that is an integral part of the HQ™ Management system has been updated and rewritten over the last six months. The goal was to add flexibility to the permissions structure and to streamline the functions, making the pages more intuitive and easier to use. Currently, we are continuing to add features to the Service Plan module, refining and expanding the data output in accordance with requests from our therapy users.

Calendar Color Highlights - Connect™

Color-coding for user's calendars has been a widely requested feature. This functionality was included in the latest calendar release. Any designated event type can be assigned a background color by the site administrator. See the example below. When new events are entered into the calendar, the color for that selected event type will highlight the title of the event. For instance, all board meetings can be one color, all government holidays a different color, all convention dates another color, making it easy to scan the screen and focus on similar events. See the new document, [♦ Using the Calendar](#), for complete details.

Calendar			
	 Reorder	<input type="button" value="New Type"/>	
Event Types			
Event Type Name	Color	Edit	Delete
Corporate Retreat			
Client Field Trip			
Company Holiday			
Client Activity			
Convention			
Board Meeting			
Administration Meeting			
Conference			
Government Holiday			

Detail Report Print Feature – Connect™, HQ™, Relate™

When any Custom Detail Report (concerning an individual record within the system) is displayed within Connect™, HQ™ or Relate™, there is now a link  [Print](#) accessing the print feature. This provides a quick and easy way to get hard copies of any report, including the specific dynamic data. See the new document, [♦ Creating Custom Detail Reports](#), for complete details.

Custom Summary Pages – Relate™

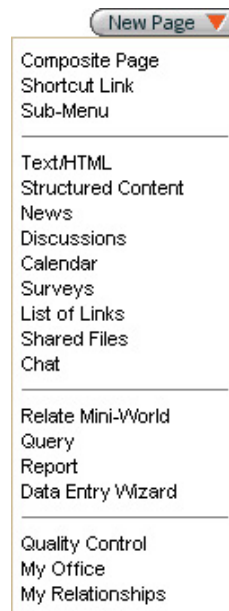
All records within Relate™ have a pre-defined record summary page. With the advent of Custom Detail Reports, administrators can replace the standard page with a screen of their own design, containing as many or as few data elements as desired and formatted in accordance with your organization's needs. This provides huge advantages in customizing the look-and-feel of Relate™ records, as well as offering opportunities for 'branding' and tailoring the displayed data to meet your organization's needs. See the new document, [♦ Creating Custom Detail Reports](#), for complete details.

New My Relationships Page – Connect™

A new page type, My Relationships, has been added to the Site Structure of Connect™. See the last entry on the New Page drop-down, below. With this page type, site and organization administrators can allow HQ™ users to have the relationships tree available outside of HQ™, on any of your organization's Connect™ pages. Each user would see only his/her own relationships and no others. With this powerful functionality, users can quickly recall records, easily find data and conveniently perform record operations, all based upon the logged-in user's established relationships to other records within the system.

New Page Listing Reorganized and Renamed - Connect™

Within the Admin – Site Structure of Connect™, the New Page drop-down, displayed below, has been reorganized so that similar-type pages are grouped together and the page names altered to more clearly reflect their purposes.



Shopping Cart Interface - Connect™

Many of our clients are interested in having a shopping cart available to users and clients. We've provided a quick and easy method of adding the PayPal™ shopping cart functions to any Connect™ pagelet. Purchasers of your products do not need to have PayPal accounts to use the shopping cart. PayPal now accepts all major credit cards from purchasers and offers extremely competitive transaction fees to sellers. See the new document, ♦ **Adding Shopping Cart**, for complete details.

PayPal



Website Payments



Turn page views into dollars; it's easy for your customers to pay when you add a PayPal payment button anywhere you use HTML.

[Website Payments Overview](#)

[Buy Now Buttons](#)

[PayPal Shopping Cart](#)

[Subscriptions and Recurring Payments](#)

[Donations](#)

New Team Link – Team™

For those of you creating new Teams, the New Team link has been moved to the drop-down contained under the My Teams button. This move was made to eliminate clutter on the navigation bar and reserve it for functions needed most often in the day-to-day usage of Team™.

Please Note: All features, functions and enhancements mentioned above are included in client base license fees without additional cost, with the exception of new pricing for disk-space usage through Data Vault™ and BlueStep Backup™ and the *AdvancedMD* system.

✿ Thank you for your interest in BlueStep™ products. As with our new and updated features, we continually strive to offer valuable improvements to meet and exceed our client's expectations.

Reseller's Opportunity

BlueStep Technologies is proud of its products and record of service to clients. We're also anxious to share the benefits and advantages of BlueStep™ software and database services with new users and organizations. To this end, we've created a reseller program. If you are a user of BlueStep™ products and would like to become a reseller, we have an attractive commission schedule for you and peerless software applications that are relevant and applicable for a vast pool of prospective clients. Contact Roy Rasband at rrasband@bluestep.net for the exciting details.

Help Documents

We have a series of helpful user guides that you can access through our client care site at www.clientcare.bluestep.net. Click on the User Help Guides link on the main navigation bar or on the individual links on the site. Many of the guides have been added in the last six months and others have been updated. On the list below, all of the new or revised guides and manuals are marked with ♦ in front of the document name. In the coming months, the older guides and manuals will be updated to reflect recent changes in our products.

Team™ User Guides

- Team™ Guide
- Team™ How To
- Team™ in Brief
- Team™ Quick Guide
- ♦ Using Team™ Committees

HQ™ User Manuals

- ♦ HQ™ Basics
- ♦ HQ™ Quick Guide
- ♦ HQ™ Record Summaries
- ♦ HQ™ User's Manual

Connect™ User Guides

- Connect™ Quick Guide
- Connect™ Users Guide


BlueStep™ Enhancement and Feature Guides

- ♦ Adding Shopping Cart
- ♦ BlueStep™ Icons
- ♦ Building Variable Record Reports
- ♦ Concepts and FAQs
- ♦ Creating Custom Detail Reports
- ♦ Media Library
- ♦ The BlueStep™ Editor
- ♦ The Record Summary
- ♦ Understanding Permissions
- ♦ Using BlueStep Backup™
- ♦ Using Data Vault™
- ♦ Using Shared Files
- ♦ Using the Calendar

New Development Calendar

The following items are on our development calendar for the next three (3) to six (6) months. Should you have other items you would like to put on a "wish" list for consideration, please let us know. We are always looking for features and enhancements that will make our products better, easier to use and more powerful.

- Ability to add objects/graphics to Relate™ records
- Data import/export utility for Relate™
- Expand Relate™ relationship capabilities

 We greatly value all of our customers and look forward to our continued relationship. Please let us know if there is anything that we can do to be of assistance or suggestions that you might have.

Sincerely,
Roy D. Rasband, President
BlueStep™ Technologies
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