

The screenshot shows the ILS Navigator Client web interface. The browser title is "ILS Navigator Client v8.15 : Macbook ILS : [mode-Z]". The browser address bar shows "http://192.168.1.100:8080/ILSNavigator/". The main content area is titled "Contact Marketing" and features a "Dashboard" section. The dashboard includes a "Current Node" field with the value "104: Route 1 - DownTown - (Living)". Below this is a "Call List" field with a "Change" button. There are also links for "Query Call List", "Activate Call List", "Create Call List", "Execute Call List", and "Release Call List". A section titled "Active Call List Indicators" contains fields for "List Description", "Inter-Activated", "Total Entries", "Already Called", and "Total Remaining".

On the left side, there are two summary tables for "MY:" and "ALL:" categories, each showing "Calls", "Orders", and "Sales" for "Today", "Yesterday", "This Week", "Last Week", "This Month", and "Last Month".

At the bottom, there are four main menu categories: "Reports : Call Lists", "Reports : General", "File Maintenance", and "Administration and Control". Each category has several sub-links for various functions like "Call List Master", "Contact Master", "Contact Marketing", "Call Statistics", "Events and Non-Calls", "General Contact Master", "Maintain Contact Master", "Contact Masters", "New Call List", "Call List Master", "Buttons", "Date", "Tasks: Submit New", "Tasks: Perform", "Tasks: Fill", "Tasks: List/Active", "Tasks: Check Progress", and "Local".

Slide 1

Slide notes: We are looking at examples of the General Reports in Contact Marketing, and we start with the Contact Master.

Contact Key	Contact Name	CRM Record	AR Account
3422	MERCH: Pie Stop 23 [Centurion Lake]	00492 Pie Stop 23 [Centurion Lake]	07106 GRABOWSKI, THERESA
3423	ABORIGINAL MULTI-MEDIA	00062 ABORIGINAL MULTI-MEDIA	01006 ABORIGINAL MULTI-MEDIA
3424	AR: DOORNKLOOF TEACHERS' ASSOCIATION	00061 DOORNKLOOF TEACHERS' ASSOCIATION	01020 DOORNKLOOF TEACHERS' ASSOCIATION
3425	AR: DOORNKLOOF WHOLESALERS	00064 DOORNKLOOF WHOLESALERS	01021 DOORNKLOOF WHOLESALERS
3426	AR: FISHING LTD.	00065 FISHING LTD.	01030 FISHING LTD.
3427	AR: ATCO I-TEK INC.	00066 ATCO I-TEK INC.	01101 ATCO I-TEK INC.
3428	AR: DOORNKLOOF CANCER BOARD	00067 DOORNKLOOF CANCER BOARD	01139 DOORNKLOOF CANCER BOARD
3429	AR: ATHABASCA UNIVERSITY	00068 ATHABASCA UNIVERSITY	01150 ATHABASCA UNIVERSITY
3430	AR: ARS TECHNICAL IMAGES	00069 ARS TECHNICAL IMAGES	01202 ARS TECHNICAL IMAGES
3431	AR: DOORNKLOOF MUNICIPAL AFFAIRS	00070 DOORNKLOOF MUNICIPAL AFFAIRS	01222 DOORNKLOOF MUNICIPAL AFFAIRS
3432	DOORNKLOOF PACIFIC FOREST INDUSTRIES	00071 DOORNKLOOF PACIFIC FOREST INDUSTRIES	01270 DOORNKLOOF PACIFIC FOREST INDUSTRIES
3433	AR: ARSHT TRALCIC ARCHITECTURE	00072 ARSHT TRALCIC ARCHITECTURE	01301 ARSHT TRALCIC ARCHITECTURE
3434	AR: EPCOR	00073 EPCOR	01319 EPCOR
3435	AR: DOORNKLOOF ASPHALT ENTERPRISES INC.	00074 DOORNKLOOF ASPHALT ENTERPRISES INC.	01328 DOORNKLOOF ASPHALT ENTERPRISES INC.
3436	AR: ACADIA UNIVERSITY	00075 ACADIA UNIVERSITY	01542 ACADIA UNIVERSITY
3437	AR: AVONBORE SCHOOL	00076 AVONBORE SCHOOL	01734 AVONBORE SCHOOL
3438	AR: AUTUMN IMAGES INC.	00077 AUTUMN IMAGES INC.	01904 AUTUMN IMAGES INC.
3439	AR: BABCO ELECTRIC & ENGINEERING LTD.	00078 BABCO ELECTRIC & ENGINEERING LTD.	02000 BABCO ELECTRIC & ENGINEERING LTD.
3440	AR: BOURGET, RON	00079 BOURGET, RON	02012 BOURGET, RON
3441	AR: BROWN, BERN WILL''ARTIST''	00080 BROWN, BERN WILL''ARTIST''	02045 BROWN, BERN WILL''ARTIST''
3442	AR: B. BASTELL STUDIO	00081 B. BASTELL STUDIO	02077 B. BASTELL STUDIO
3443	AR: BLUE RIDGE LUMBER [1981] LTD.	00082 BLUE RIDGE LUMBER [1981] LTD.	02090 BLUE RIDGE LUMBER [1981] LTD.
3444	AR: BOYLE STREET COOP	00083 BOYLE STREET COOP	02105 BOYLE STREET COOP

Slide 2

Slide notes: The Contact Master is of course the main register used for building Call Lists. In other words the people we will call. This report is customizable and can be produced in a variety of formats. In this case we show the CRM, AR and Merchandise references for each Contact.

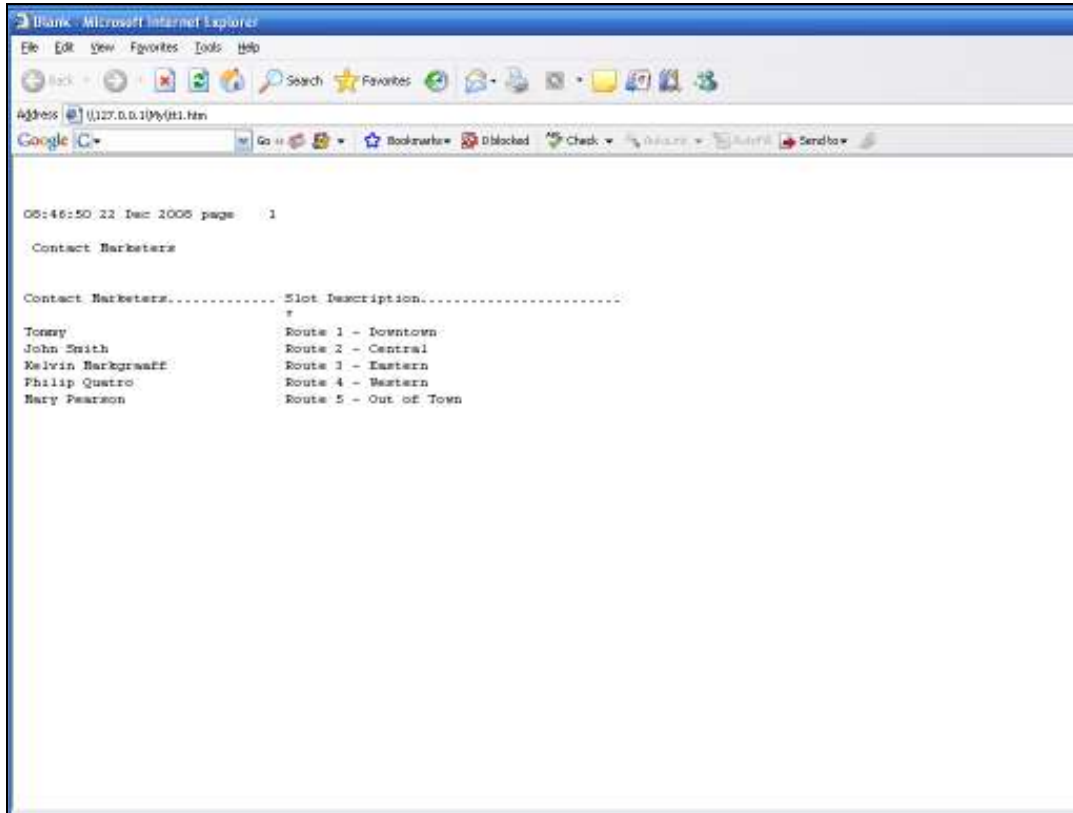
The screenshot shows the IIS Navigator Client interface for 'Macbook IIS'. The main content area is titled 'Contact Marketing' and features a 'Dashboard' section. On the left, there are two summary tables: 'MY:' and 'ALL:'. The 'MY:' table shows data for 'Calls', 'Orders', and 'Sales' across five time periods: Today, Yesterday, This Week, Last Week, and Last Month. The 'ALL:' table shows similar data for all users. The 'Dashboard' section on the right includes a 'Current Node' field set to '941: Route 1 - Downtown (Conting)', a 'Call List' field with a 'Change' button, and a list of actions: 'Query Call List', 'Activate Call List', 'Create Call List', 'Execute Call List', and 'Release Call List'. Below this is a section for 'Active Call List Indicators' with fields for 'List Description when activated', 'Total Entries', 'Already Called', and 'Total Remaining'. At the bottom, there are four main navigation categories: 'Reports: Call Lists', 'Reports: General', 'File Maintenance', and 'Administration and Control', each with a list of sub-links.

	Calls	Orders	Sales
Today	0	0	0.00
Yesterday	185	44	11,550.00
This Week	0	0	0.00
Last Week	485	452	44,500.00
This Month	1512	1671	166,100.00
Last Month	1395	735	554,150.00

	Calls	Orders	Sales
Today	0	0	0.00
Yesterday	420	336	44,200.00
This Week	0	0	0.00
Last Week	2136	1800	267,500.00
This Month	6840	4204	665,200.00
Last Month	5640	2940	469,600.00

Slide 3

Slide notes: Next we look at our list of Contact Marketers.



Slide 4

Slide notes: And in this case we have 5 Contact Marketing Profiles.

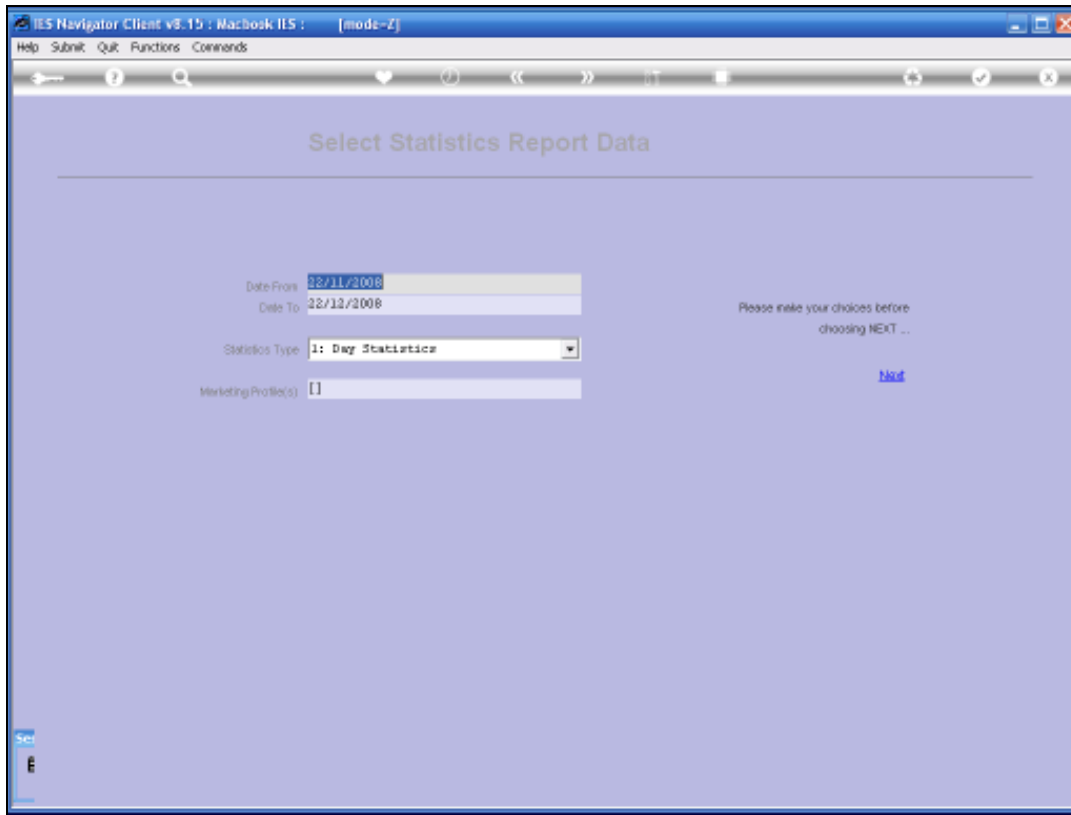
The screenshot shows the ILS Navigator Client interface. At the top, there's a navigation bar with 'Help', 'Logout', and other options. The main content area is titled 'Contact Marketing' and features a 'Dashboard' section. On the left, there are two summary tables: 'MY:' and 'ALL:'. The 'MY:' table shows sales data for 'Calls', 'Orders', and 'Sales' across different time periods (Today, Yesterday, This Week, Last Week, This Month, Last Month). The 'ALL:' table shows similar data for all users. The 'Dashboard' section on the right includes a 'Current Node' field, a 'Call List' dropdown, and several action links like 'Query Call List', 'Activate Call List', 'Create Call List', 'Execute Call List', and 'Release Call List'. Below the dashboard, there are sections for 'Active Call List Indicators' and 'Reports' (Call Lists, General). At the bottom, there are links for 'File Maintenance' and 'Administration and Control'.

	Calls	Orders	Sales
Today	0	0	0.00
Yesterday	185	44	11,550.00
This Week	0	0	0.00
Last Week	485	452	44,500.00
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Last Week	2136	1800	267,500.00
This Month	6840	4200	605,200.00
Last Month	5640	2940	400,000.00

Slide 5

Slide notes: The next report we want to look at is for Call Statistics and results.



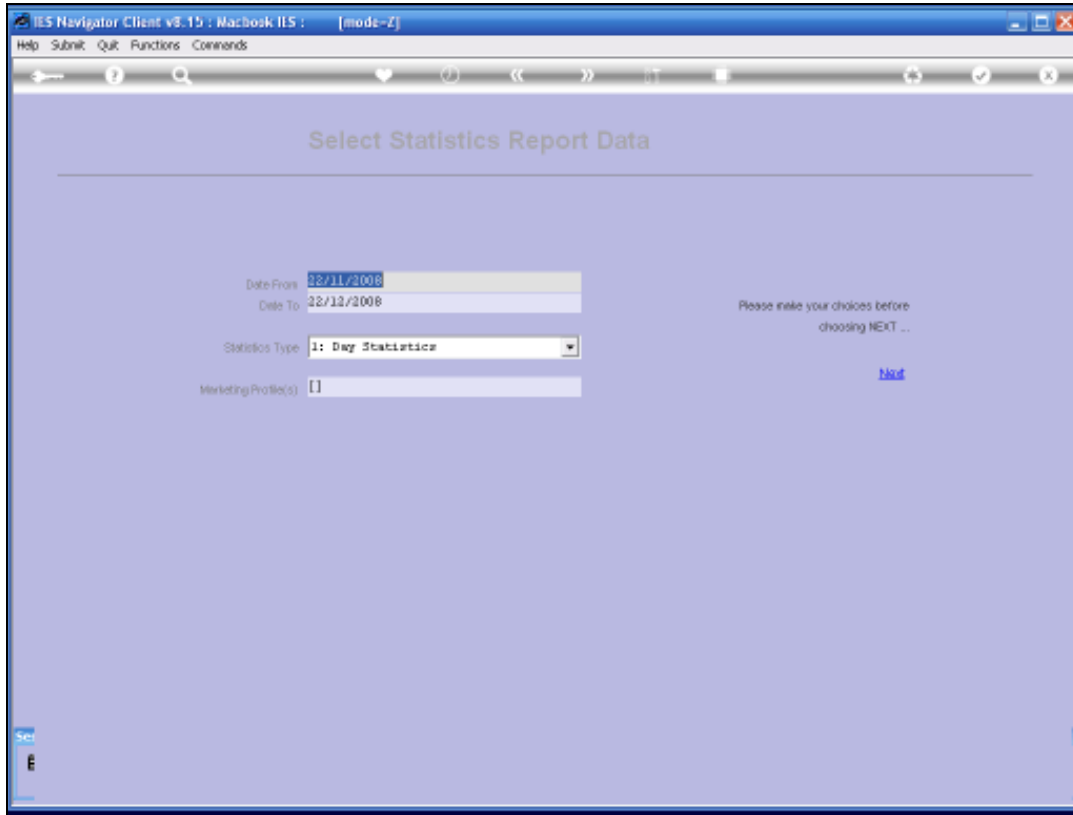
The screenshot shows a web browser window titled "IES Navigator Client v8.15 : Macbook IES : [mode-Z]". The browser's address bar is empty, and the page content is a form titled "Select Statistics Report Data". The form includes the following fields:

- Date From: 12/11/2008
- Date To: 22/12/2008
- Statistics Type: 1: Day Statistics (dropdown menu)
- Marketing Profile(s): [ ]

To the right of the form, there is a message: "Please make your choices before choosing NEXT ..." and a blue "Next" button. The browser's status bar at the bottom left shows "Sec" and "E".

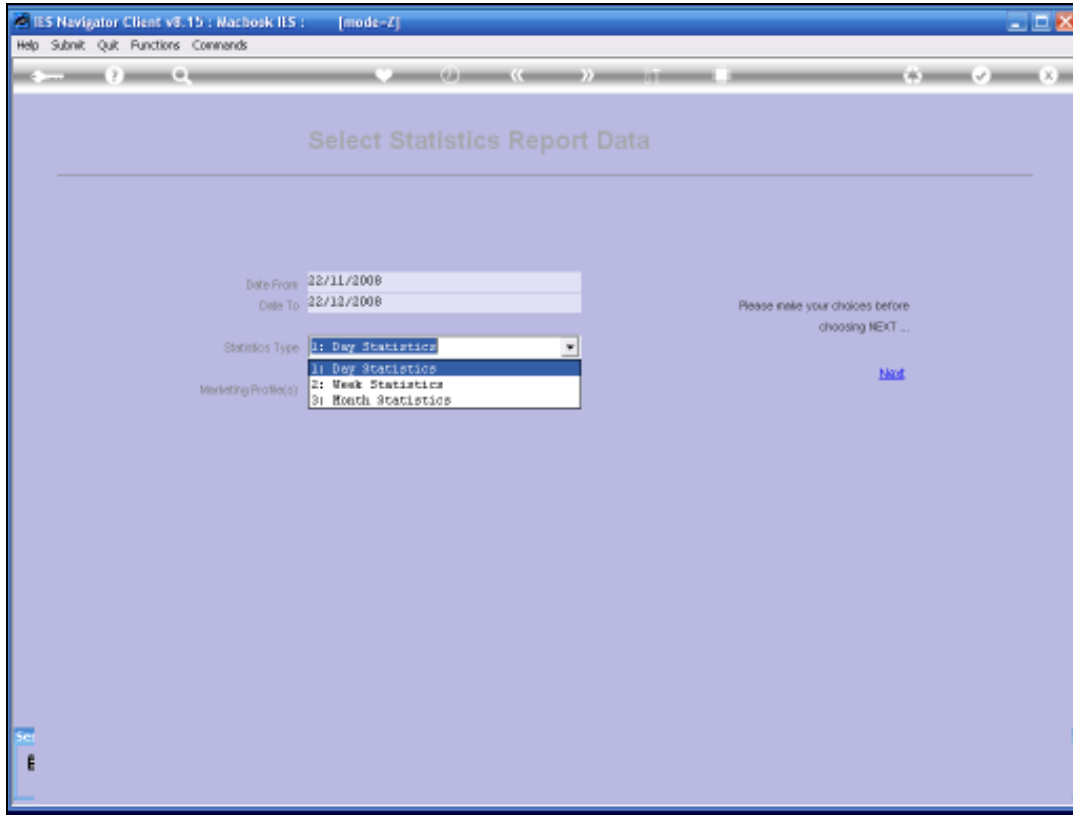
Slide 6

Slide notes: We can select any date range for which to produce the statistics.



Slide 7

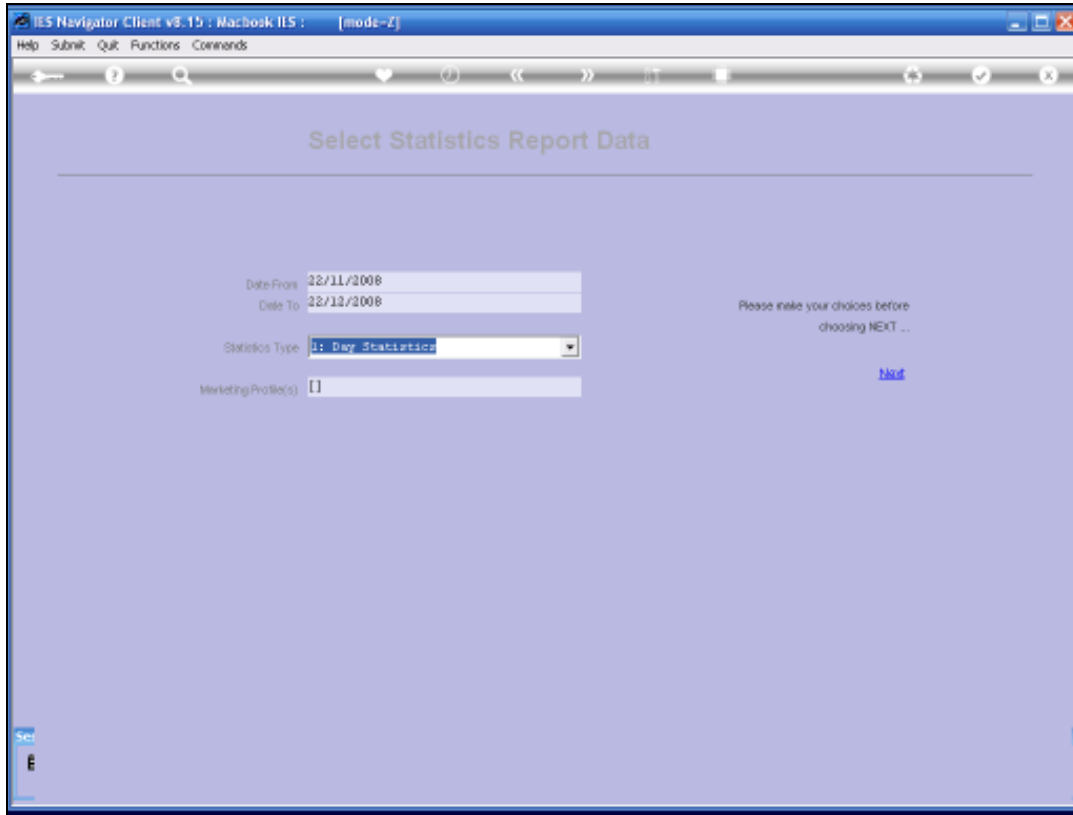
Slide notes:



Slide 8

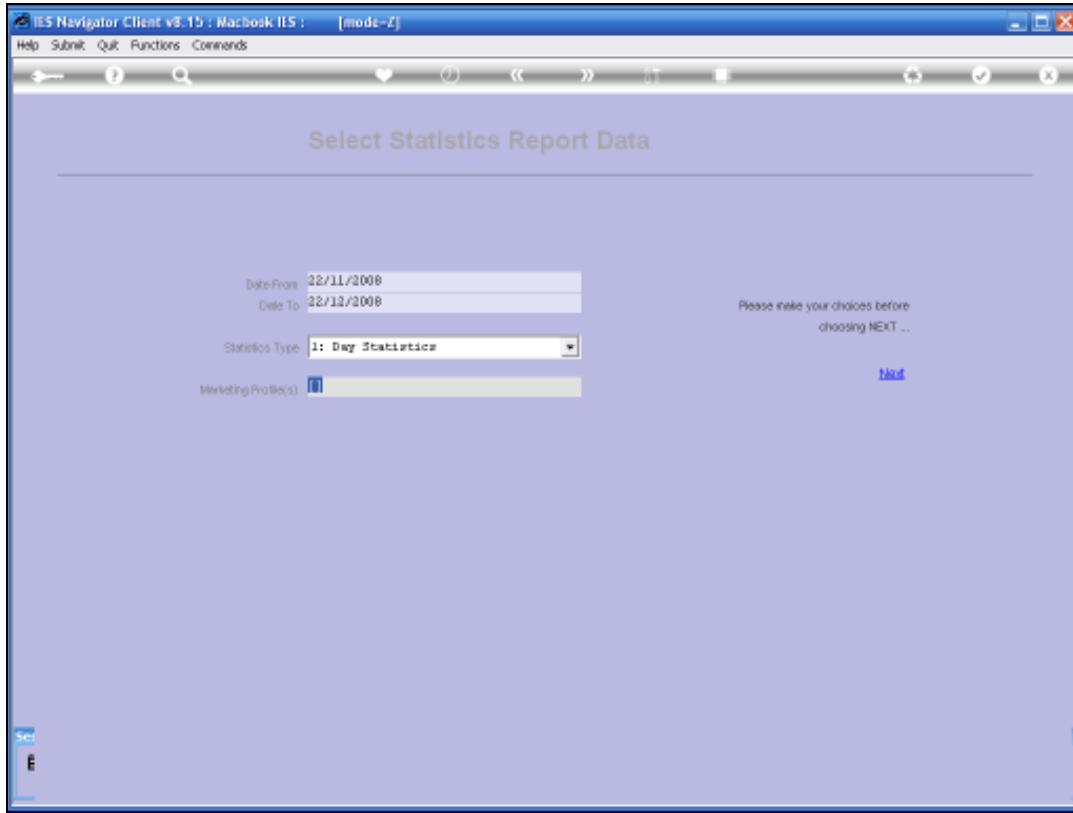
Slide notes: And we can produce Day, Week or Month Results.





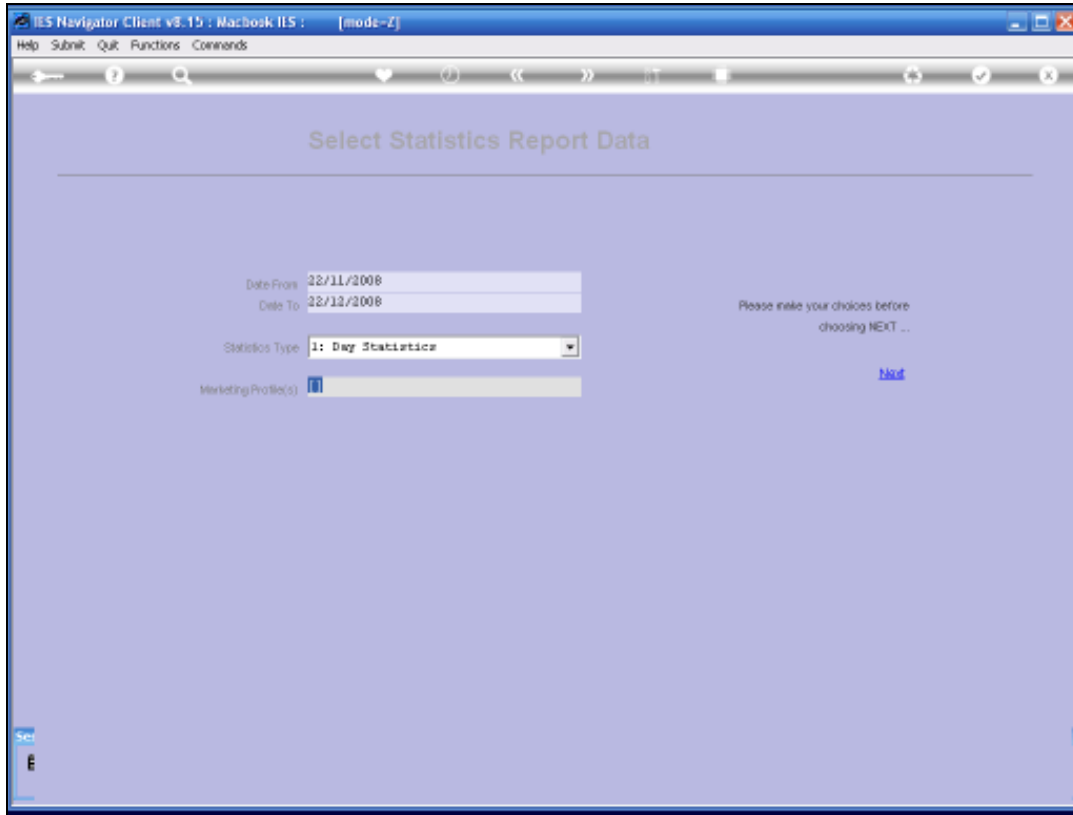
Slide 9

Slide notes:



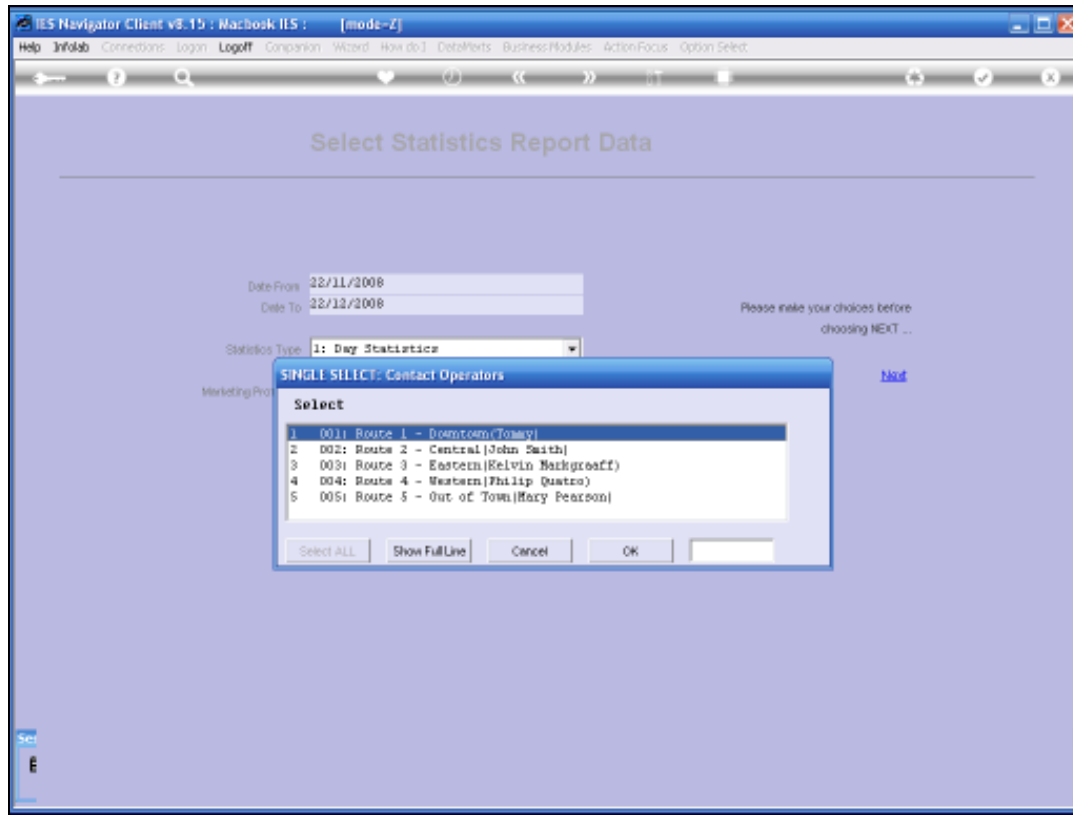
Slide 10

Slide notes:



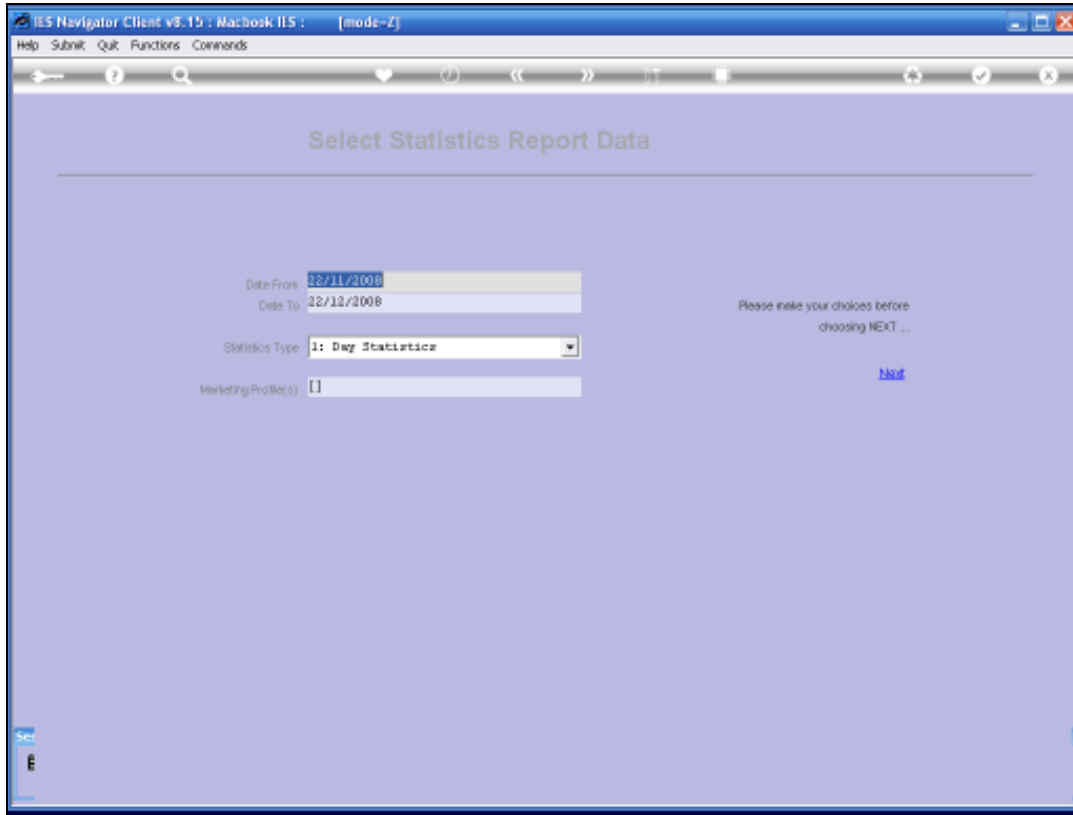
Slide 11

Slide notes:



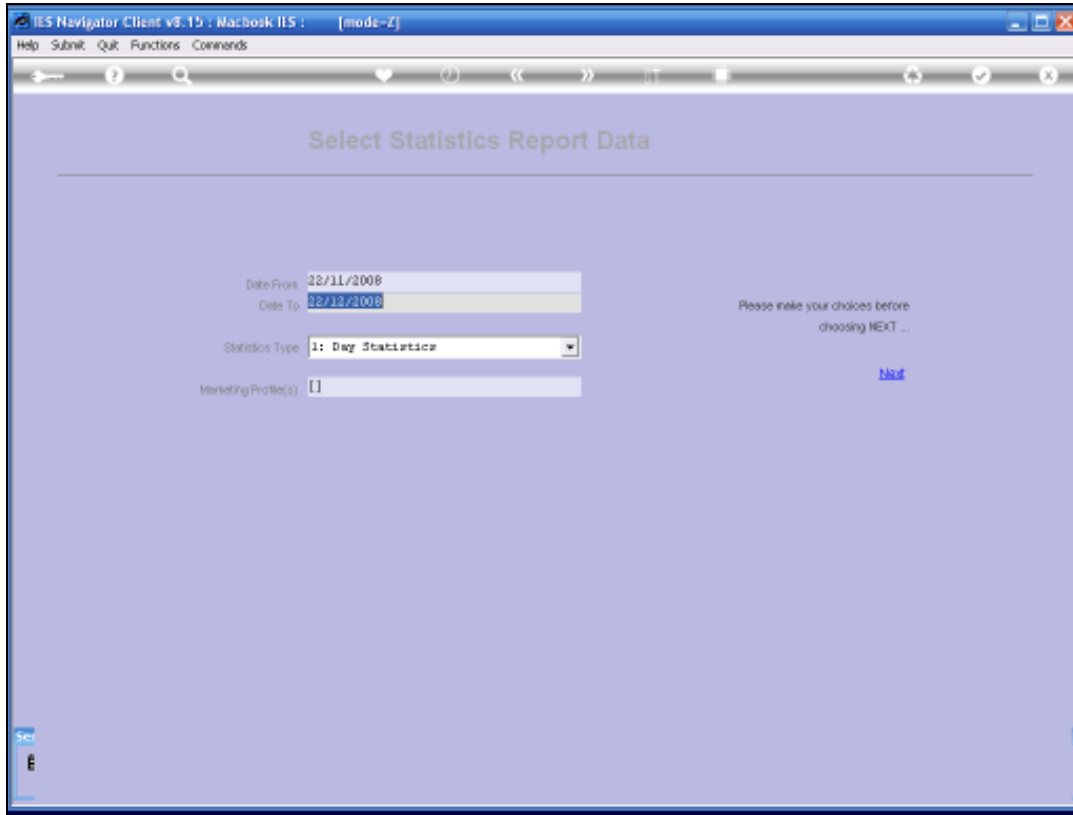
## Slide 12

Slide notes: We can also produce statistics for a selected Marketing Profile, if we want to, but if we work with the wildcards then all Marketers are included.



Slide 13

Slide notes:



Slide 14

Slide notes:

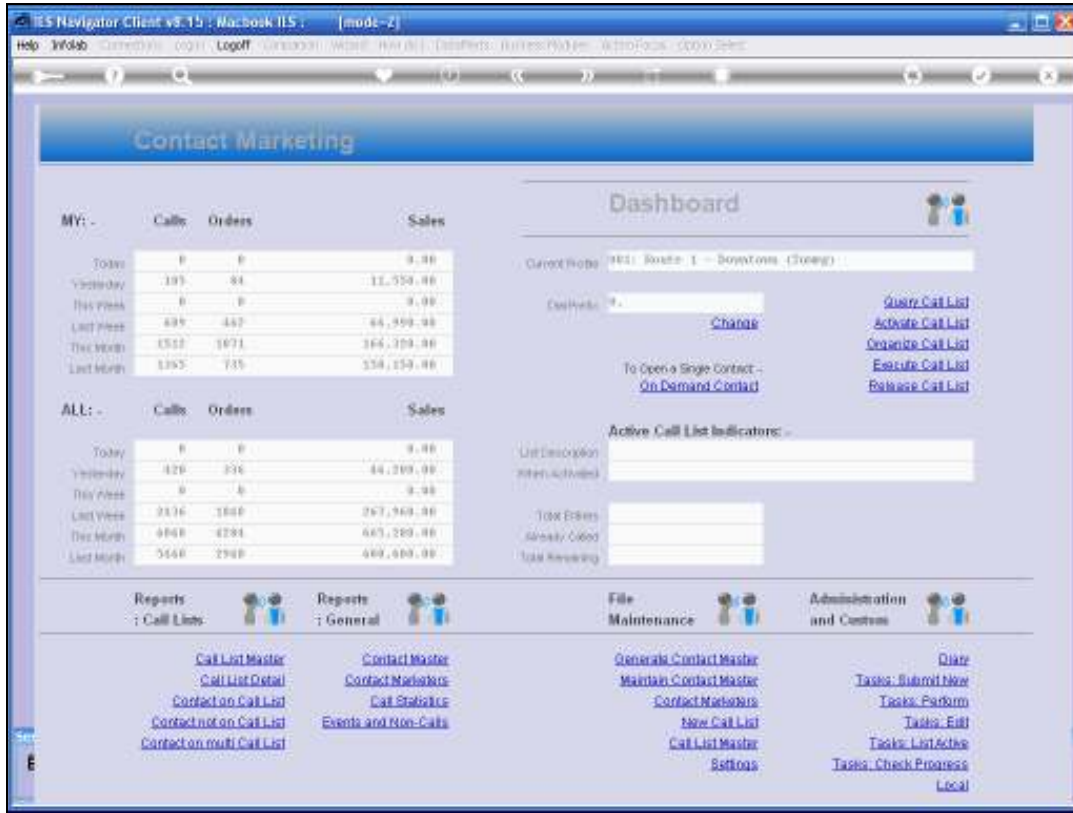
09:04:23 22 Dec 2008 page 1

Contact Call Statistics, by Day

Date	Profile	Calls	Orders	Sales
22/11/2008	1 - Route 1 - Downtown	51	22	5,520.00
22/11/2008	2 - Route 2 - Central	35	21	7,620.00
22/11/2008	3 - Route 3 - Eastern	58	17	3,620.00
22/11/2008	4 - Route 4 - Western	22	18	3,820.00
22/11/2008		166	78	20,580.00
23/11/2008	1 - Route 1 - Downtown	40	20	7,230.00
23/11/2008	2 - Route 2 - Central	19	19	4,420.00
23/11/2008	3 - Route 3 - Eastern	37	21	4,620.00
23/11/2008	4 - Route 4 - Western	38	21	5,620.00
23/11/2008		134	81	21,890.00
24/11/2008	1 - Route 1 - Downtown	42	21	4,620.00
24/11/2008	2 - Route 2 - Central	44	22	4,620.00
24/11/2008	3 - Route 3 - Eastern	53	18	9,620.00
24/11/2008	4 - Route 4 - Western	29	25	3,620.00
24/11/2008		168	86	22,480.00
25/11/2008	1 - Route 1 - Downtown	42	21	4,620.00
25/11/2008	2 - Route 2 - Central	40	18	8,820.00
25/11/2008	3 - Route 3 - Eastern	40	21	4,620.00
25/11/2008	4 - Route 4 - Western	42	23	5,620.00
25/11/2008		164	83	23,680.00
26/11/2008	1 - Route 1 - Downtown	63	42	6,930.00

Slide 15

Slide notes: And here we have a sample of Day Statistics.



Slide 16

Slide notes: Now we look at the report for Call Problems, called events.



IES Navigator Client vs. 15.15 : Macbook ILS : [mode-2]

Help Submit Quit Functions Comments

IES REPORTS AND QUERIES: - User Instructions

NAME: CALL EVENTS AND NON-CALLS

1 - CHOOSE VERSION [Versions](#)  
 Report Version: System Version: Call Events and Non-Calls

2 - CHOOSE SETTINGS  
 Format: REPORT  
 Output: FILE  
 File Type:.htm HTML FILE  
 Format: 99: Blank  
 Report Header: Call Events and Non-Calls

3 - CHOOSE DATA SELECTOR [Advanced Selection](#)  
 Find Choice  
 Data Selector: CallEventsAndNonCalls

4 - TO e-MAIL THE RESULTS. Priority: Normal  
 Dispatch By E-Mail  
 Mail To: Call Events and Non-Calls  
 Message Body: Report by Mail

5 - ADAPT DATA SELECTOR (if groups are present)  
 HOW TO ADAPT MY CHOICE

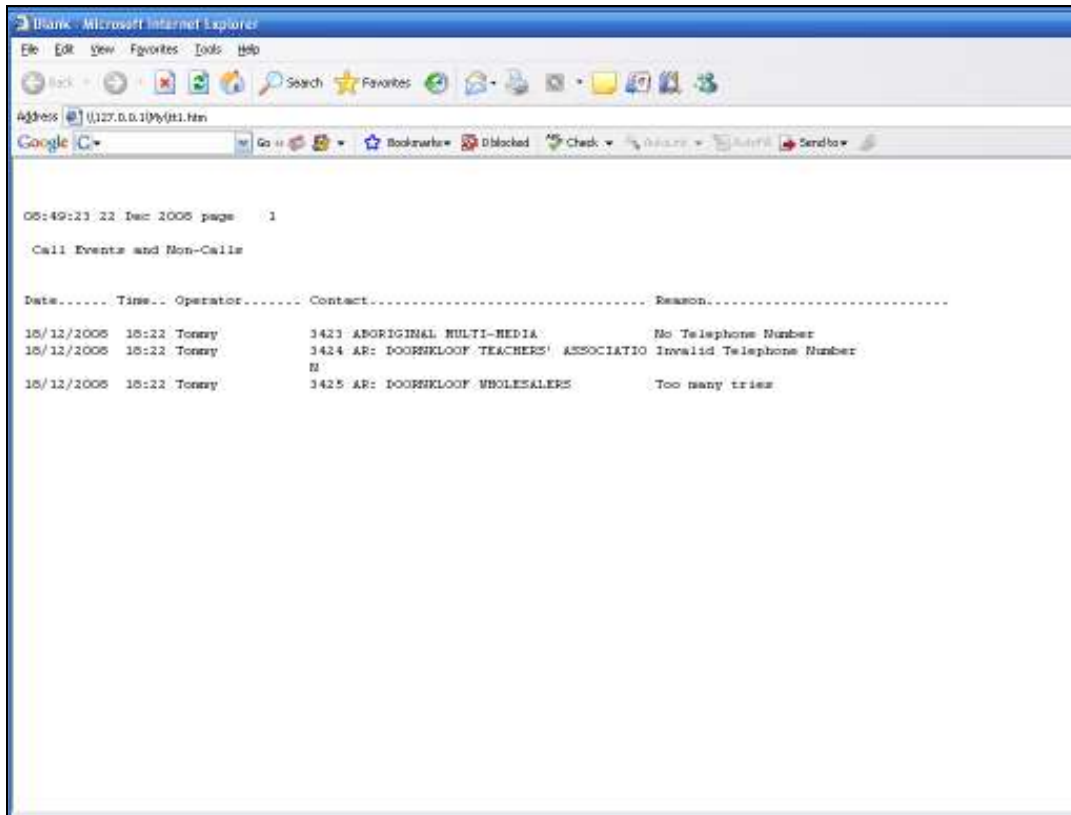
Selection Tip	My Choice
1 Date From	17/12/2008
2 Date To	22/12/2008

6 - Record Select:  
 OPEN Records Only  
 CLOSED Records Only  
 EITHER

7 - CHOOSE NEXT [Next](#)

Slide 17

Slide notes: This can be produced for a selected Date range.



Date	Time	Operator	Contact	Reason
10/12/2008	10:22	Tonny	3423 ABORIGINAL MULTI-MEDIA	No Telephone Number
10/12/2008	10:22	Tonny	3424 AR: DOORNKLOOF TEACHERS' ASSOCIATIO N	Invalid Telephone Number
10/12/2008	10:22	Tonny	3425 AR: DOORNKLOOF WHOLESALERS	Too many tries

### Slide 18

Slide notes: And the results are important to the Administrator for resolving problems with Contact Call details. As we can see here, we have reported problems of 'no telephone number', 'invalid telephone number', etc. And the Administrator can act on this information to rectify the problem so that next time the Contacts can be called successfully.