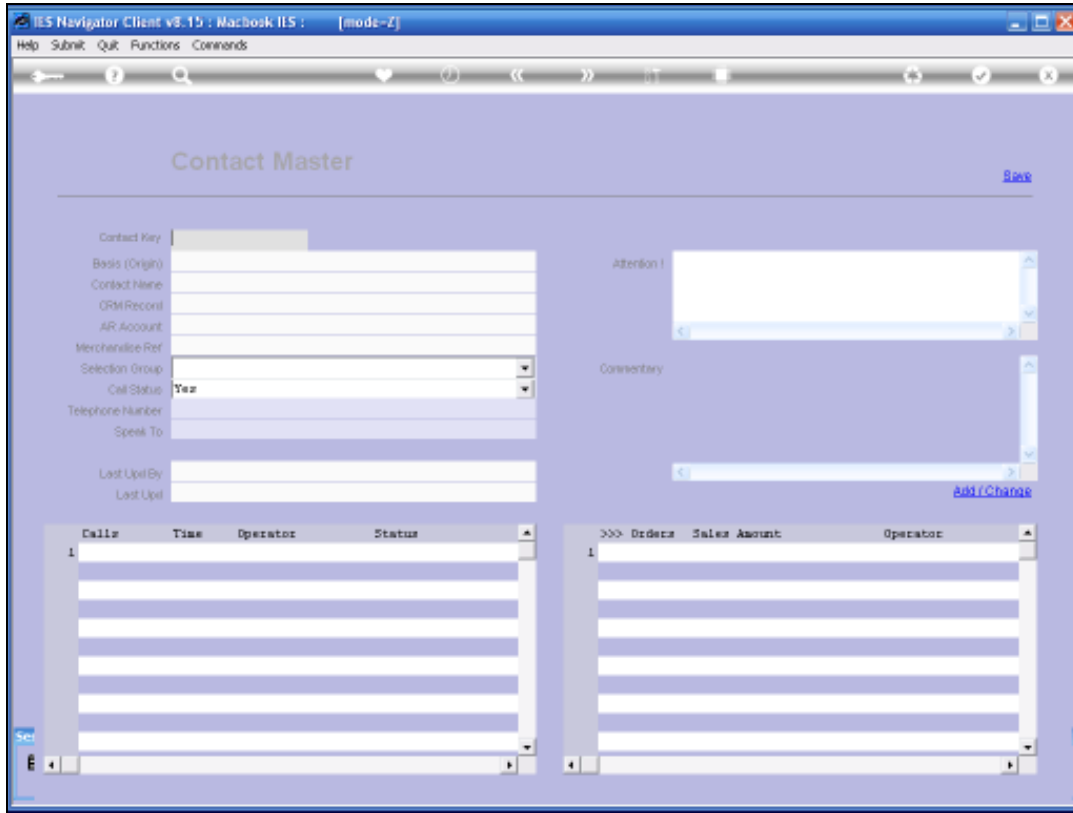


The screenshot displays the ILS Navigator Client web interface. The browser title is "ILS Navigator Client v8.15 : Macbook ILS : [mode-Z]". The page features a "Contact Marketing" header and a "Contact Dashboard" section. On the left, there are two summary tables for "MY:" and "ALL:" categories, each showing "Calls", "Orders", and "Sales" for "Today", "Yesterday", "This Week", "Last Week", "This Month", and "Last Month". The "Contact Dashboard" includes a "Current Node" field, a "Call List" search box, and several action links like "Query Call List", "Activate Call List", "Create Call List", "Execute Call List", and "Release Call List". Below this, there are "Active Call List Indicators" and a table for "Total Orders", "Grand Total", and "Total Revenue". At the bottom, there are four main menu categories: "Reports", "File Maintenance", and "Administration and Control", each with a list of sub-links.

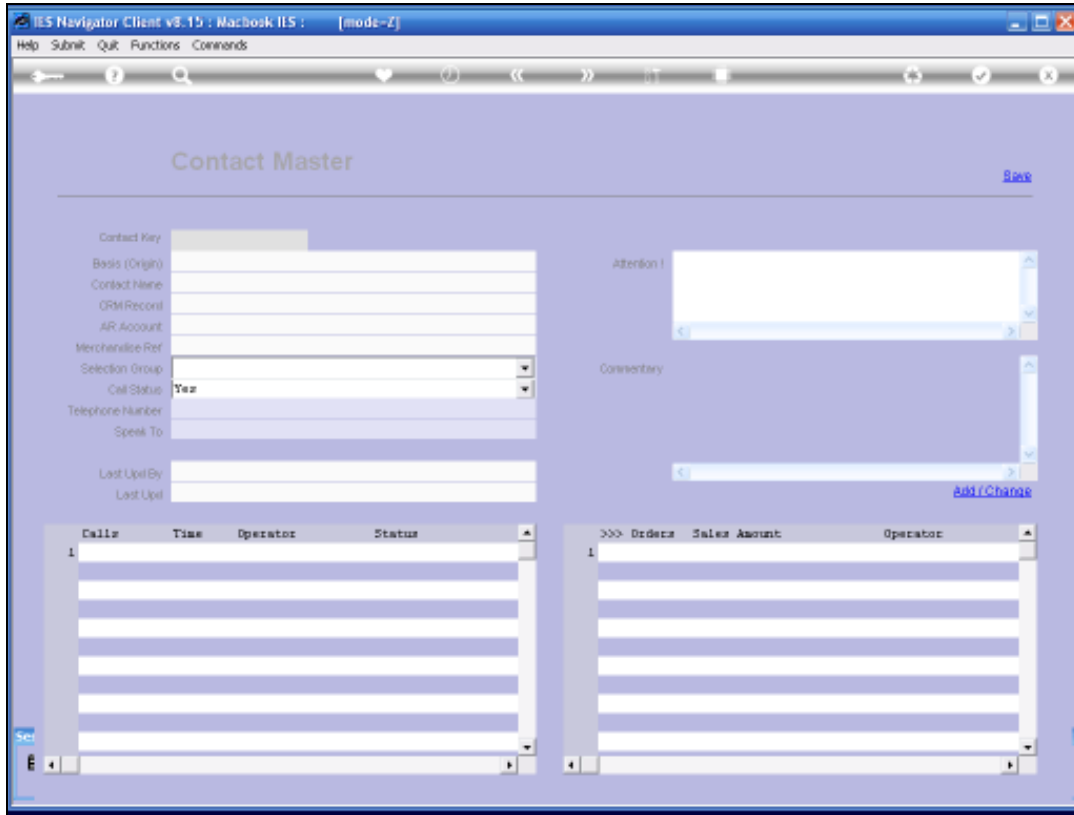
Slide 1

Slide notes: In this tutorial we look at the Contact Master, and the File Maintenance Option. The Contact Master is the register that is used for Contact Calls when we include entries on the Call Lists.



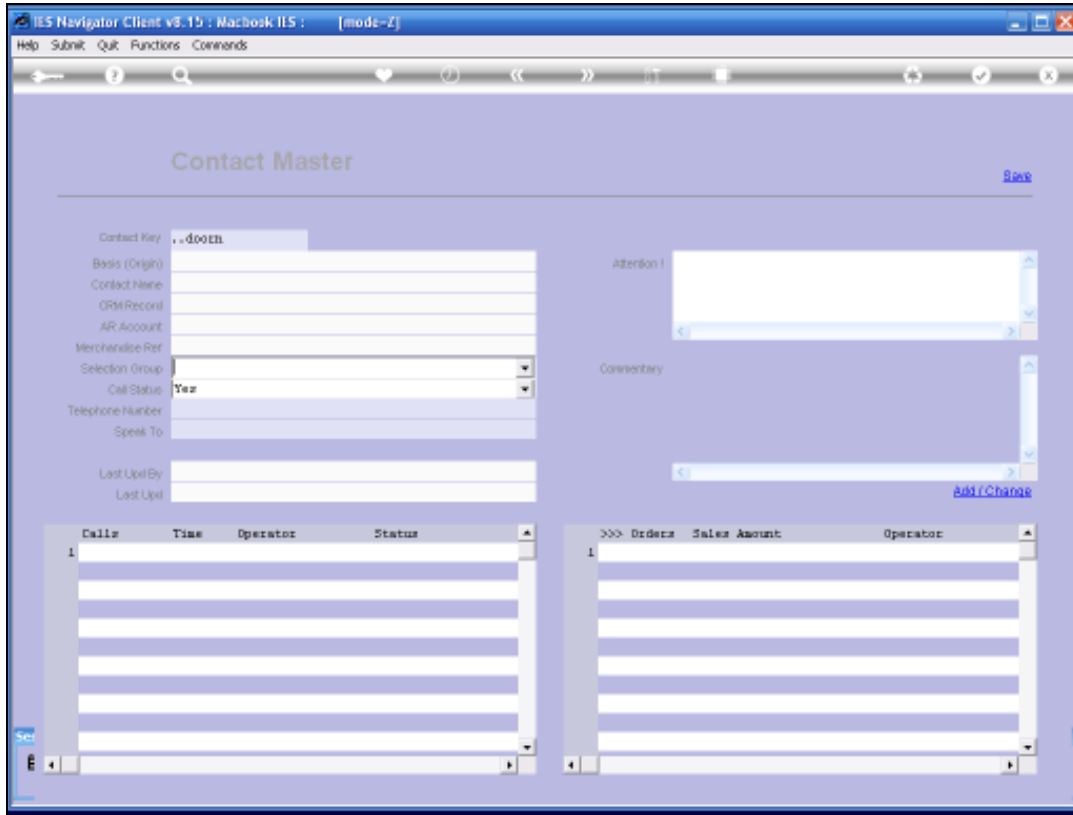
Slide 2

Slide notes: I will select a Contact Master record to work with.



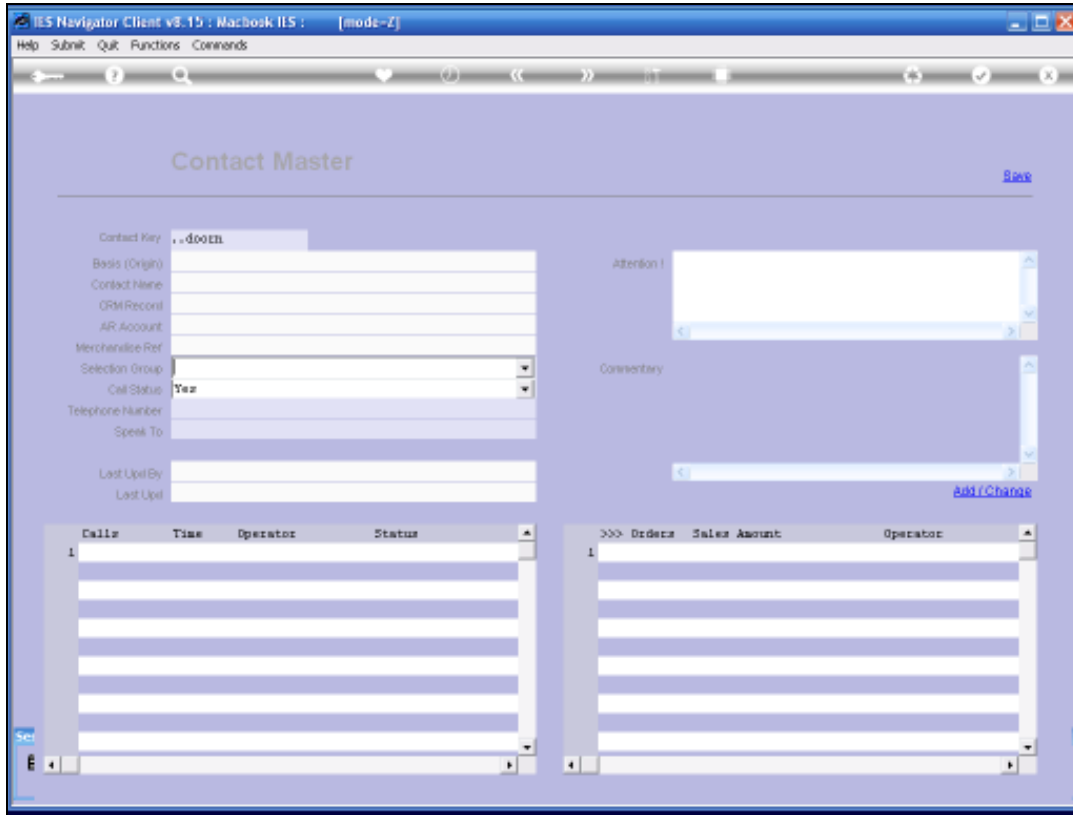
Slide 3

Slide notes:



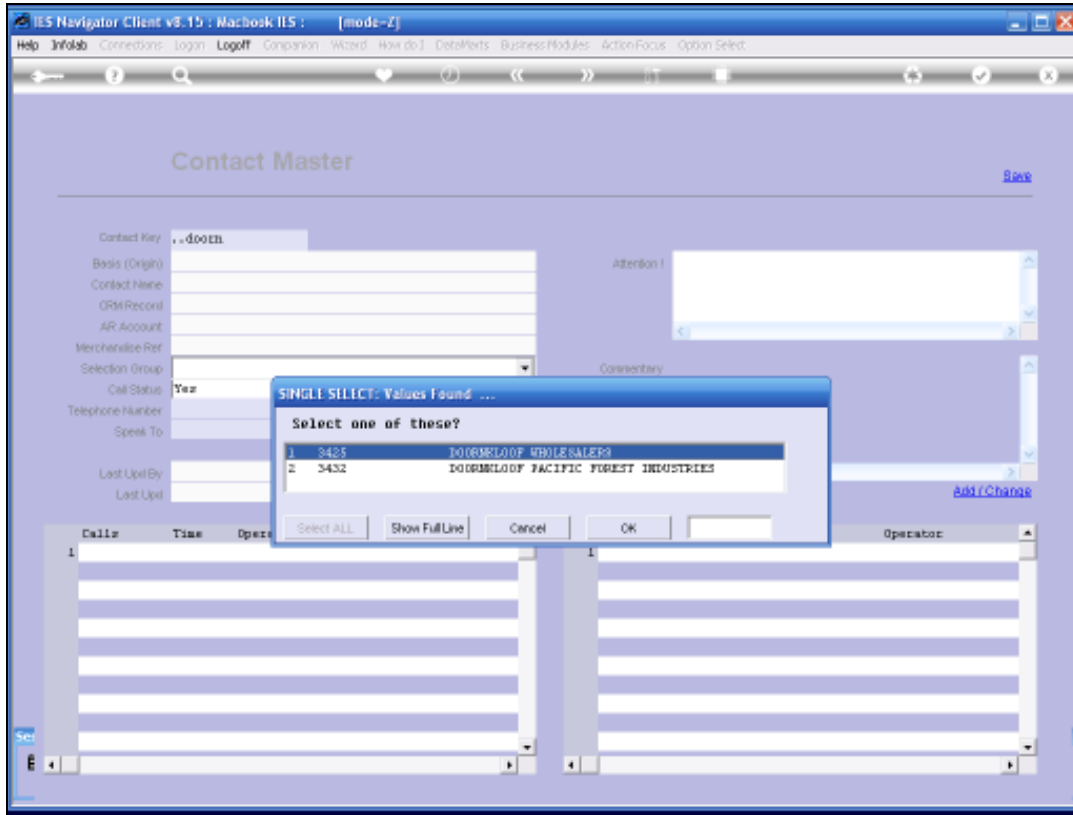
Slide 4

Slide notes:



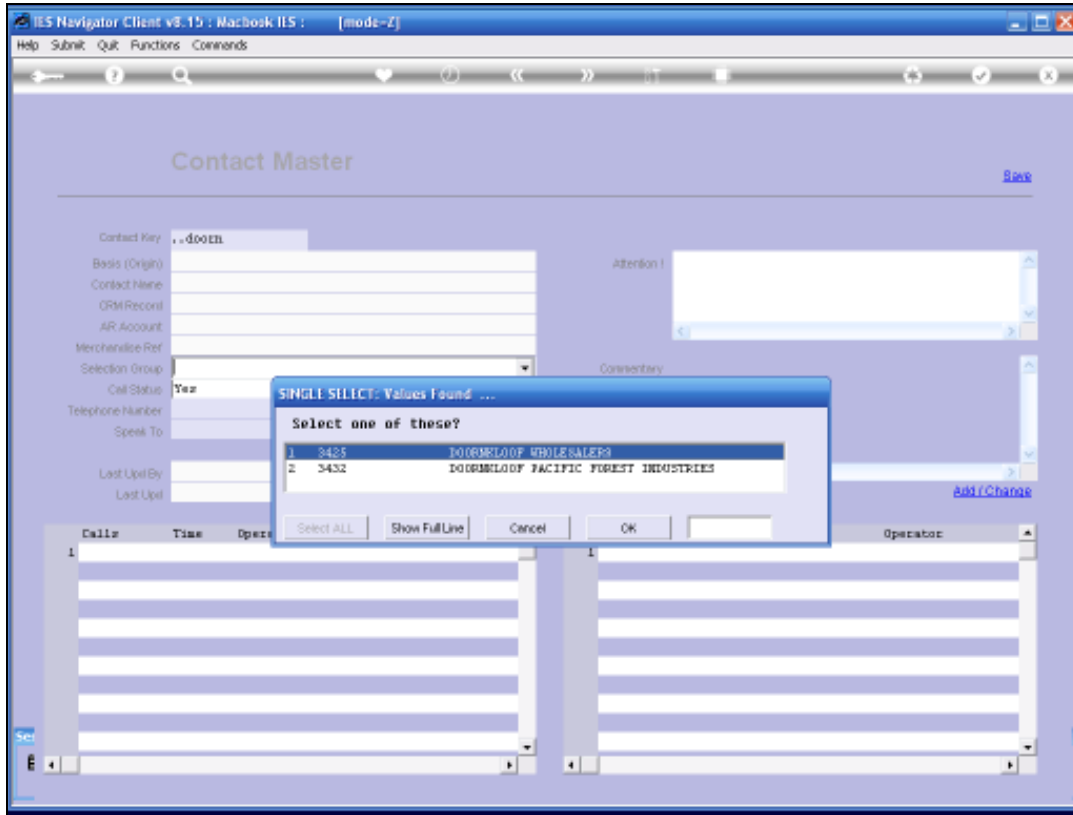
Slide 5

Slide notes:



Slide 6

Slide notes:



Slide 7

Slide notes:

IES Navigator Client v8.15 : Macbook IES : [mode-Z]

Help Submit Quit Functions Commands

Contact Master

[Save](#)

Contact Key: 3425
 Basis (Origin): SR Dealer
 Contact Name: 00000100P WHOLESALERS
 CRM Record: 00004 00000100P WHOLESALERS
 AR Account: 01021 00000100P WHOLESALERS
 Merchandise Ref:
 Selection Group: ATT
 Call Status: YES
 Telephone Number: 383 26431
 Speak To: Noah
 Last Upd By: Tommy
 Last Upd: 22/12/2008

Attention I:
 Inventory:

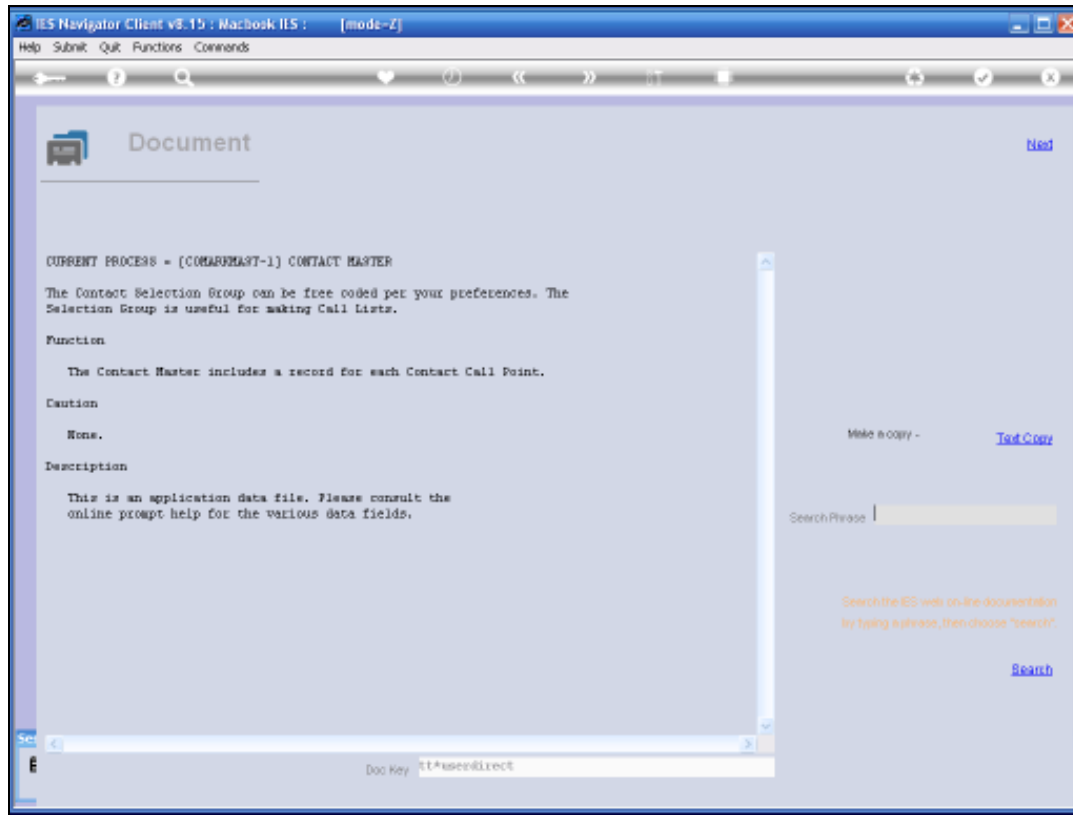
[Add/Change](#)

Call#	Time	Operator	Status
1	19/12/2008 21:23	Tommy	OK
2	18/12/2008 18:22	Tommy	Give Up

Order#	Sales Amount	Operator
1		

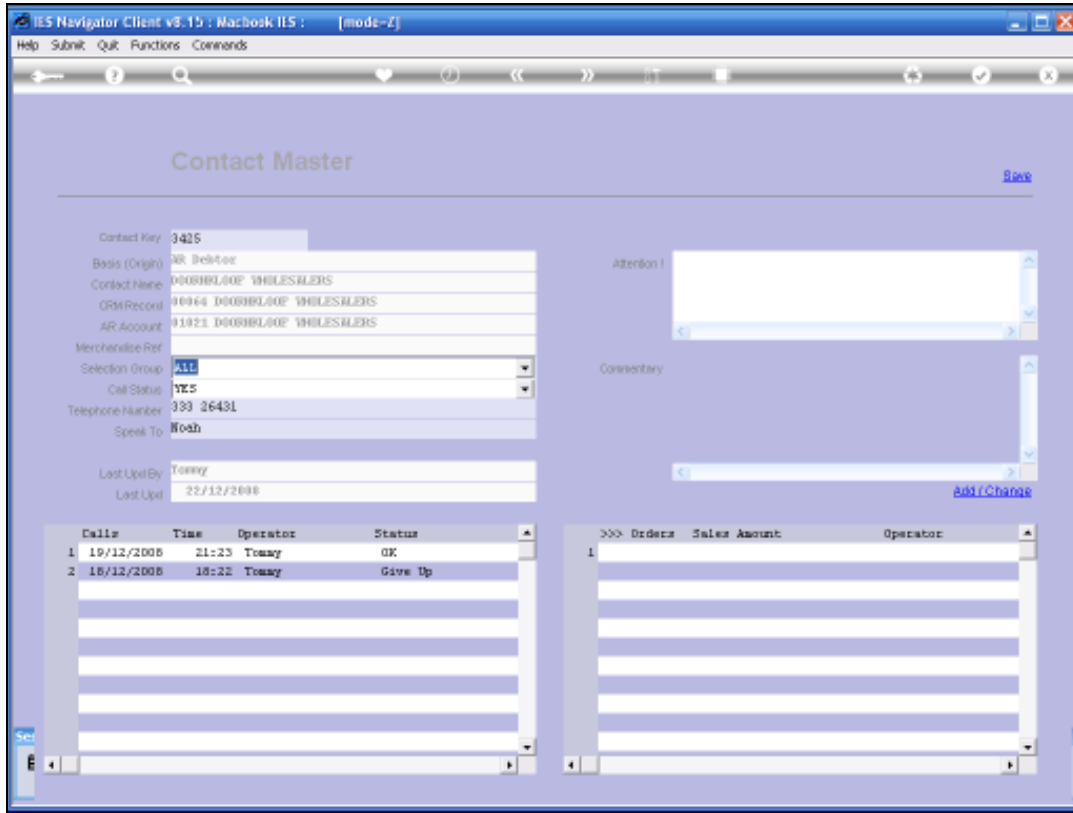
Slide 8

Slide notes: The Selection Group is quite useful, and by coding selection groups here, it becomes easier to select the correct entries for a Call List. It really doesn't matter what system we use, it all depends on our needs. For example, if we have Call Lists by Delivery Route, then we can put a Route Code here. If, in another case, we organize our calls demographically, then we can use a demographic code.



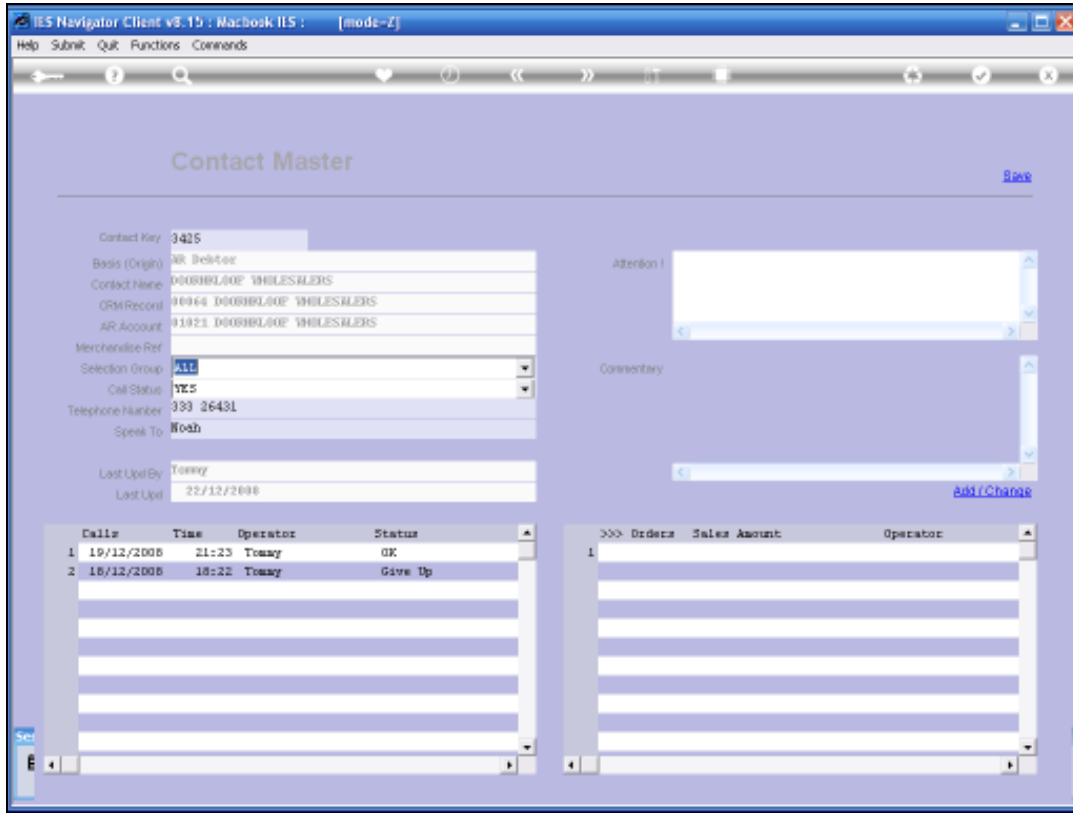
Slide 9

Slide notes: Here is the help on the Selection Group field.



Slide 10

Slide notes:



Slide 11

Slide notes:

IES Navigator Client v8.15 : Macbook IES : [mode-Z]

Help Submit Quit Functions Commands

Contact Master

[Save](#)

Contact Key: 3425
Basis (Origin): SR Dealer
Contact Name: 00000000 WHOLESALE
CRM Record: 00000000 WHOLESALE
AR Account: 00000000 WHOLESALE
Merchandise Ref:
Selection Group: ALL
Call Status: YES
Telephone Number: 333 26431
Speak To: Noah
Last Upd By: Tommy
Last Upd: 22/12/2008

Attention:
Inventory:

[Add/Change](#)

Call#	Time	Operator	Status
1	19/12/2008 21:23	Tommy	OK
2	18/12/2008 18:22	Tommy	Give Up

Order#	Sales Amount	Operator
1		

Slide 12

Slide notes: The Call Status can be YES or NO. If it is YES, then the Contact can be called, otherwise not.

IES Navigator Client v8.15 : Macbook IES : [mode-Z]

Help Submit Quit Functions Commands

Contact Master

[Save](#)

Contact Key: 3425

Basis (Origin): SR Dealer

Contact Name: 00000000 WHOLESALE

CRM Record: 00000000 WHOLESALE

AR Account: 00000000 WHOLESALE

Merchandise Ref:

Selection Group: ALL

Call Status: YES

Telephone Number: 333 36431

Speak To: Noah

Last Upd By: Tony

Last Upd: 22/12/2008

Attention: [Dropdown]

Inventory: [Dropdown]

[Add/Change](#)

Calls	Time	Operator	Status
1	19/12/2008	21:23 Tony	OK
2	18/12/2008	18:22 Tony	Give Up

Orders	Sales Amount	Operator
1		

Slide 13

Slide notes: The telephone number is critical. A Contact cannot be called without a Telephone number.

IES Navigator Client v8.15 : Macbook IES : [mode-Z]

Help Submit Quit Functions Commands

Contact Master

[Save](#)

Contact Key: 3425

Basis (Origin): SR Dealer

Contact Name: 00000000 WHOLESALE

CRM Record: 00000000 WHOLESALE

AR Account: 01021 00000000 WHOLESALE

Merchandise Ref:

Selection Group: ALL

Call Status: YES

Telephone Number: 383 26431

Speak To: Tony

Last Upd By: Tony

Last Upd: 22/12/2008

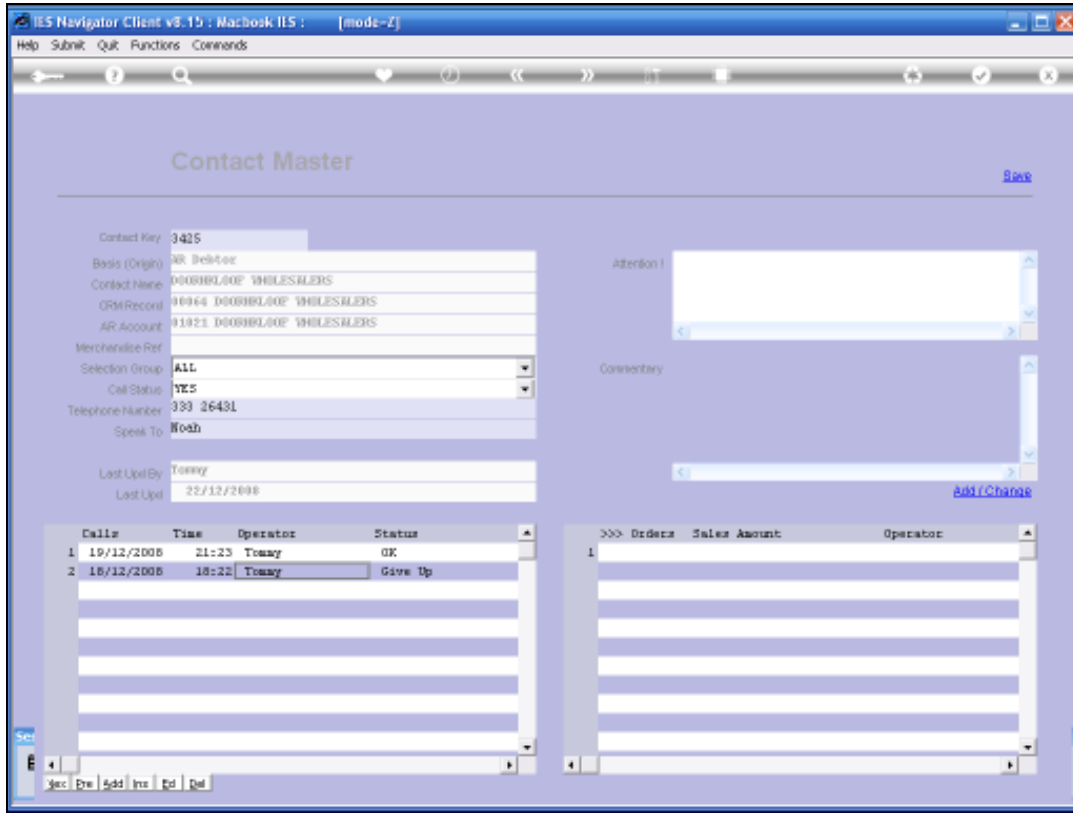
[Add/Change](#)

Call#	Time	Operator	Status
1	19/12/2008 21:23	Tony	OK
2	18/12/2008 18:22	Tony	Give Up

Order#	Sales Amount	Operator
1		

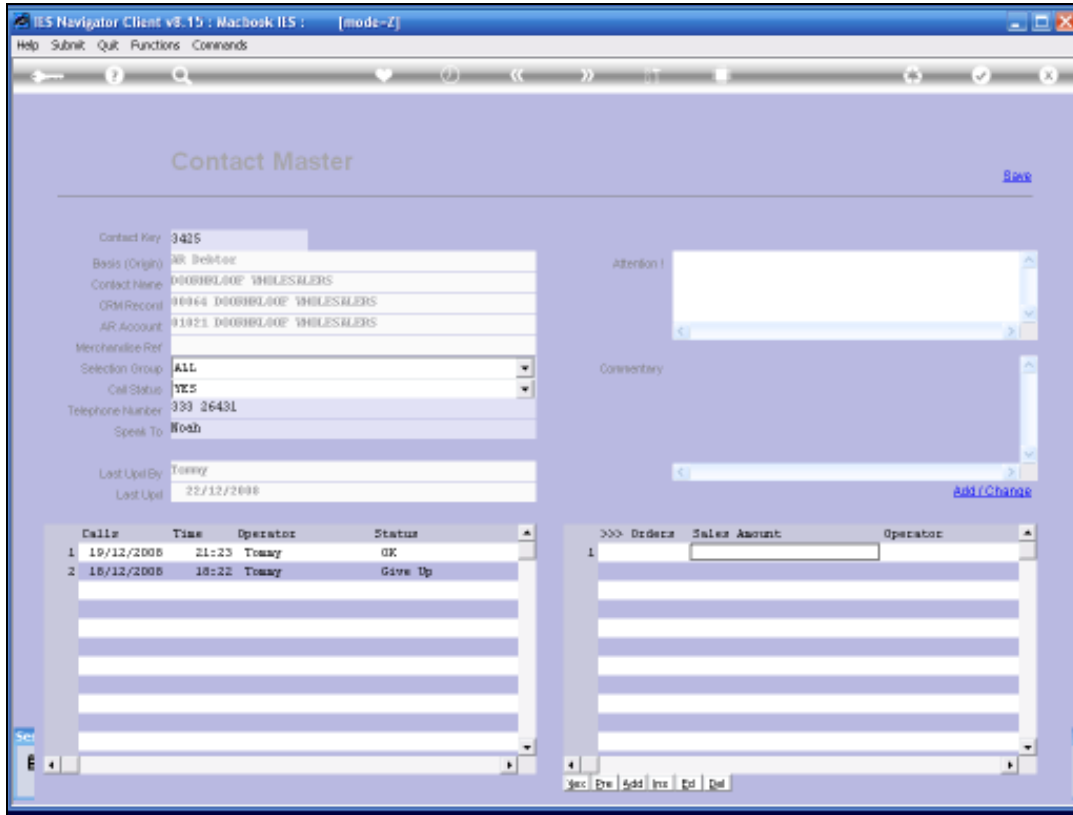
Slide 14

Slide notes: The "Speak To" indicator is quite important as well. There is not always a known NAME to speak to, but when it is available it should be indicated.



Slide 15

Slide notes: The Call Master will also show the entire Call History for this Contact.



Slide 16

Slide notes: All Orders will be on display, and can be drilled, i.e. enquired upon.

IES Navigator Client v8.15 : Macbook IES : [mode-Z]

Help Submit Quit Functions Commands

Contact Master

[Save](#)

Contact Key: 3425
Basis (Origin): SR Dealer
Contact Name: 00000L00P WHOLESALERS
CRM Record: 00044 00000L00P WHOLESALERS
AR Account: 01021 00000L00P WHOLESALERS
Merchandise Ref:
Selection Group: ALL
Call Status: YES
Telephone Number: 383 26431
Speak To: Noah
Last Upld By: Tommy
Last Upld: 22/12/2008

Attention I:

Commentary:

[Add/Change](#)

Call#	Time	Operator	Status
1	19/12/2008 21:23	Tommy	OK
2	18/12/2008 18:22	Tommy	Give Up

Order#	Sales Amount	Operator
1		

Slide 17

Slide notes: The ATTENTION box is used to record any critical information that should be shown to the Operator before calling the Contact.

IES Navigator Client v8.15 : Macbook IES : [mode-Z]

Help Submit Quit Functions Commands

Contact Master

[Save](#)

Contact Key: 3425

Basis (Origin): SR Dealer

Contact Name: 00000100 WHOLESALE

CRM Record: 00004 00000100 WHOLESALE

AR Account: 01021 00000100 WHOLESALE

Merchandise Ref:

Selection Group: ALL

Call Status: YES

Telephone Number: 383 26431

Speak To: Noah

Last Upd By: Tommy

Last Upd: 22/12/2008

Attention:

Commentary:

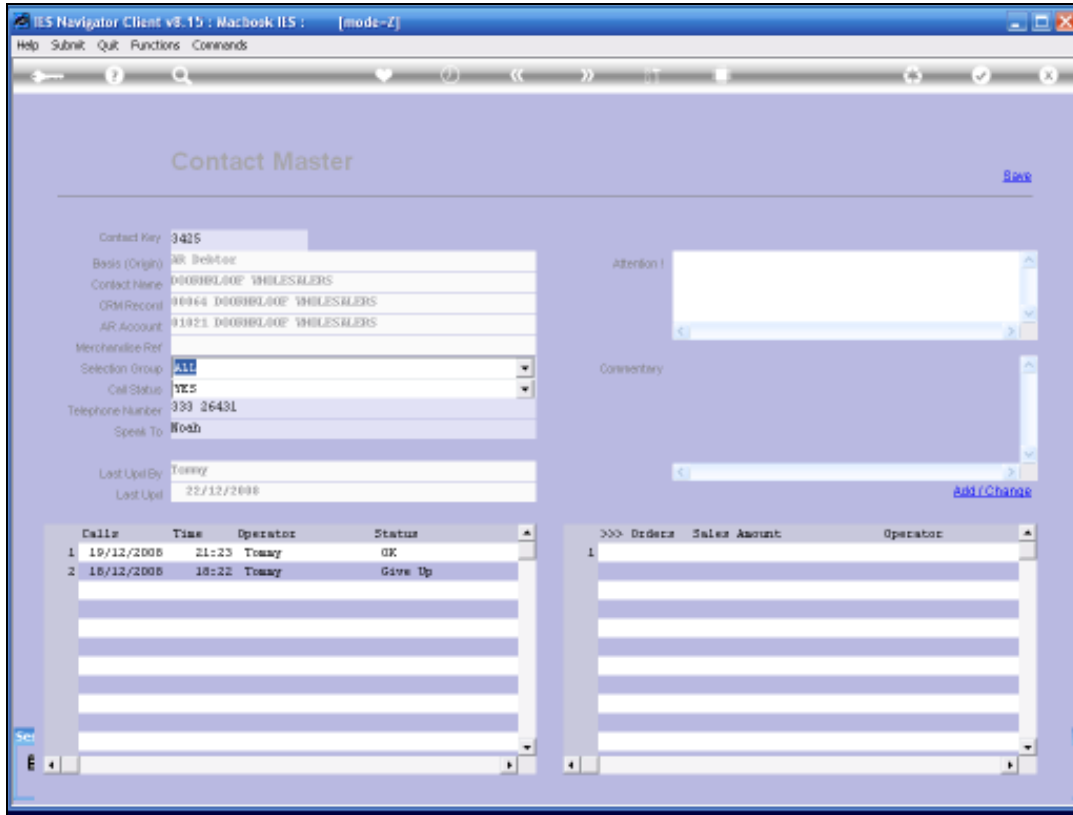
[Add/Change](#)

Call#	Time	Operator	Status
1	19/12/2008 21:23	Tommy	OK
2	18/12/2008 18:22	Tommy	Give Up

Order#	Sales Amount	Operator
1		

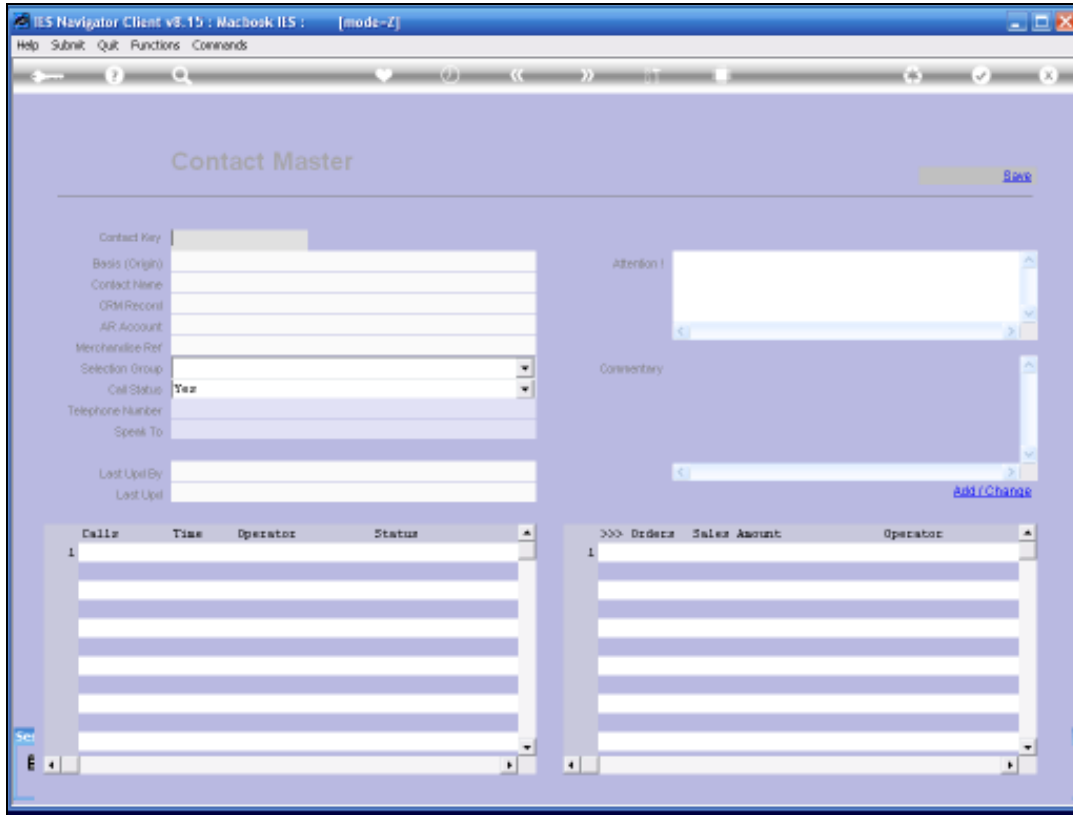
Slide 18

Slide notes: The Commentary box shows all comments that are recorded, both from here and from the Call Screen when the Contact Marketer records notes there.



Slide 19

Slide notes:



Slide 20

Slide notes: