Slide 1

Slide notes: In this tutorial we discuss the Call List Master. The Call List master is maintainable, and can be changed on demand.

Slide 2

Slide notes: At the Call List Master, we can only retrieve existing Call Lists, so a Call List must first be created before we can work with it here.
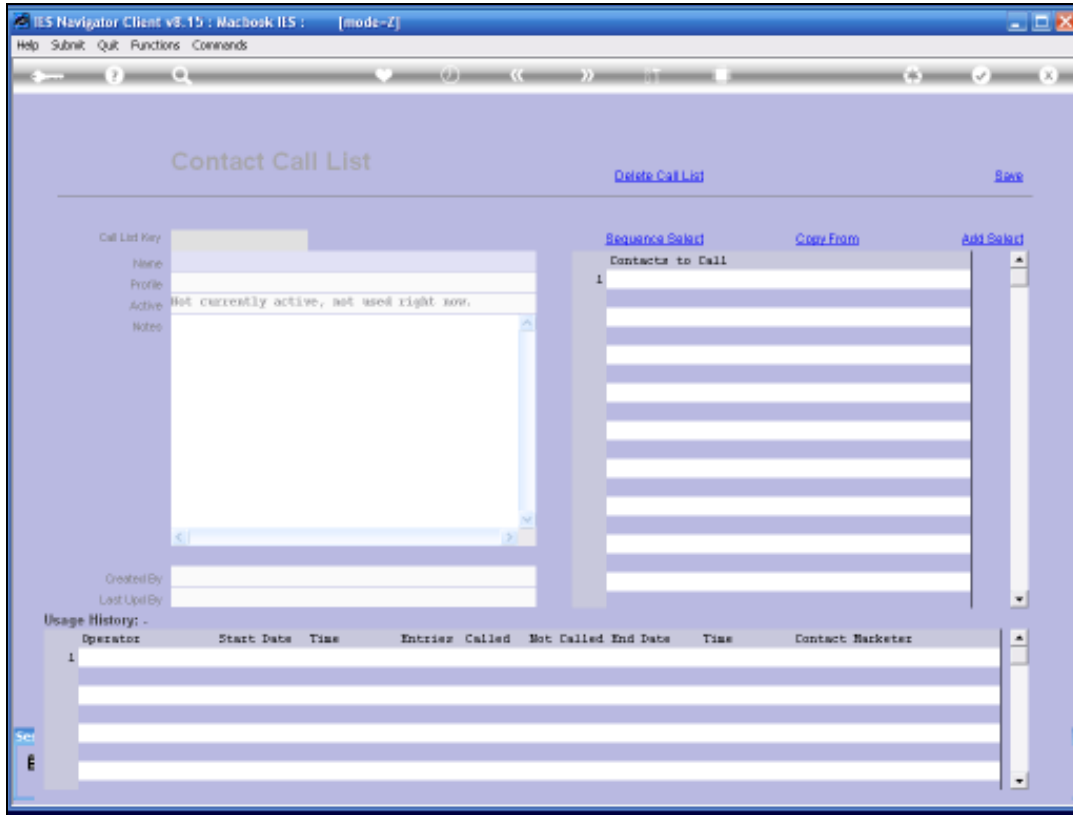
Slide 3
Slide notes:

Slide 4
Slide notes:

Slide 5
Slide notes:

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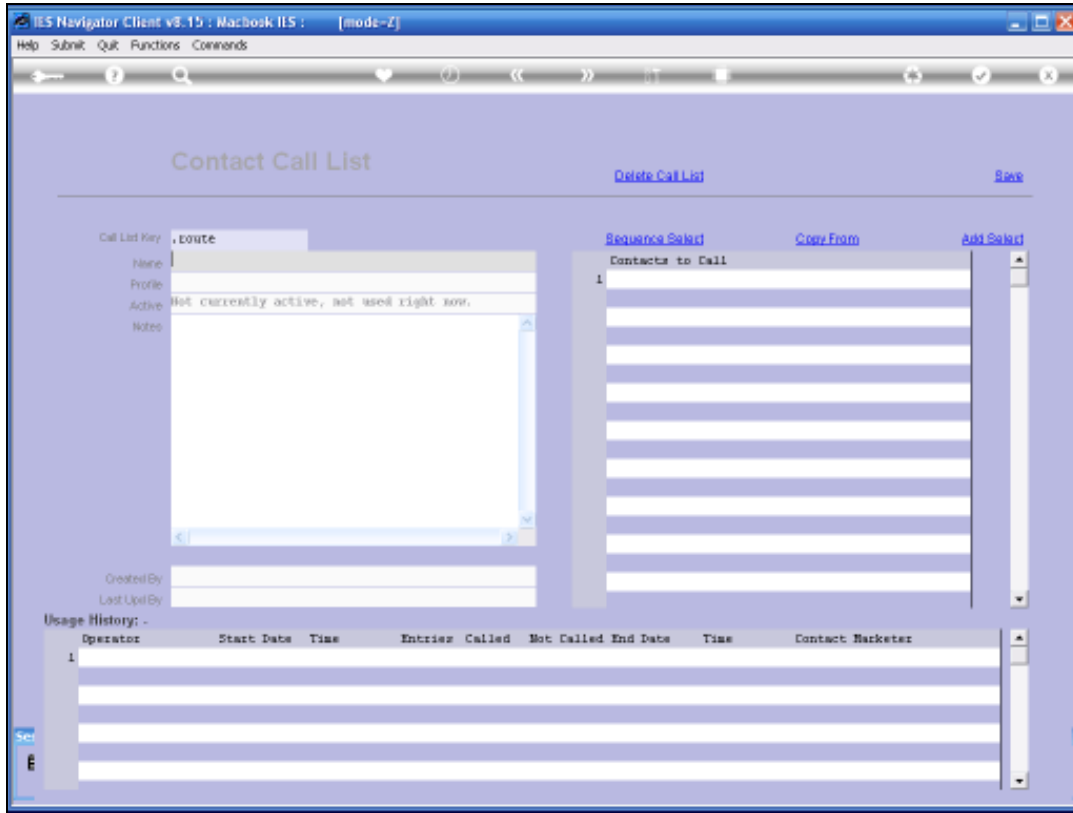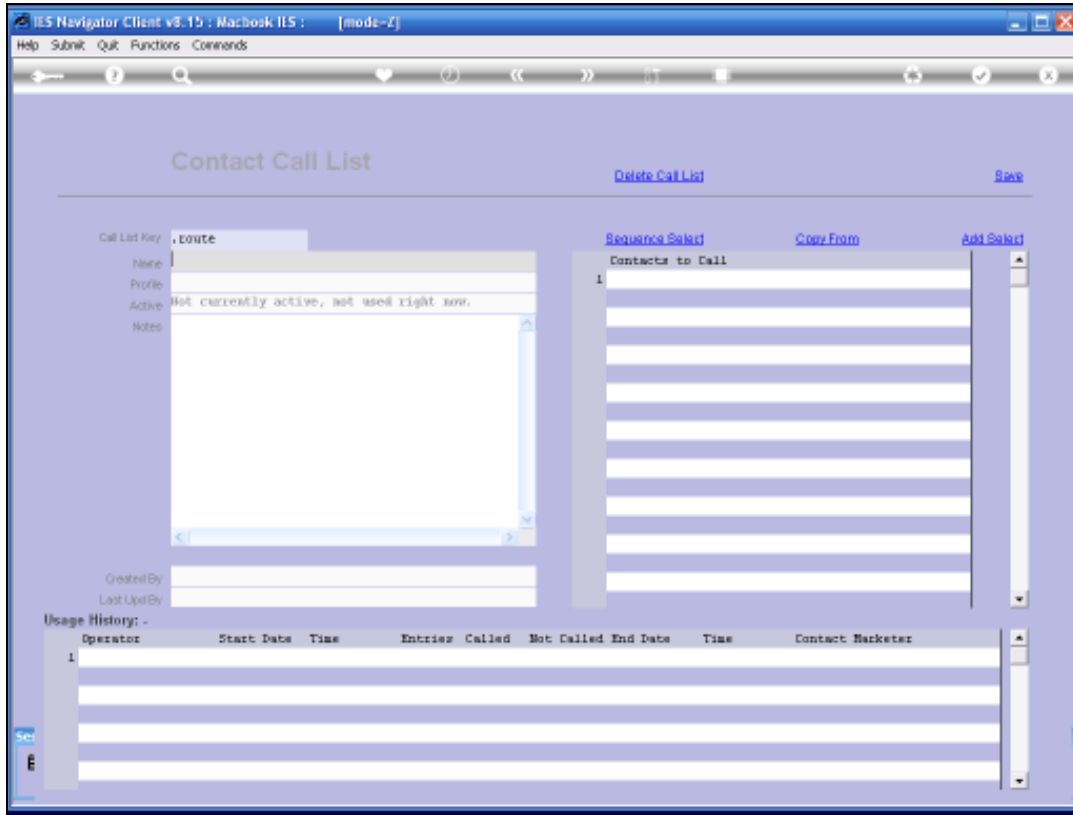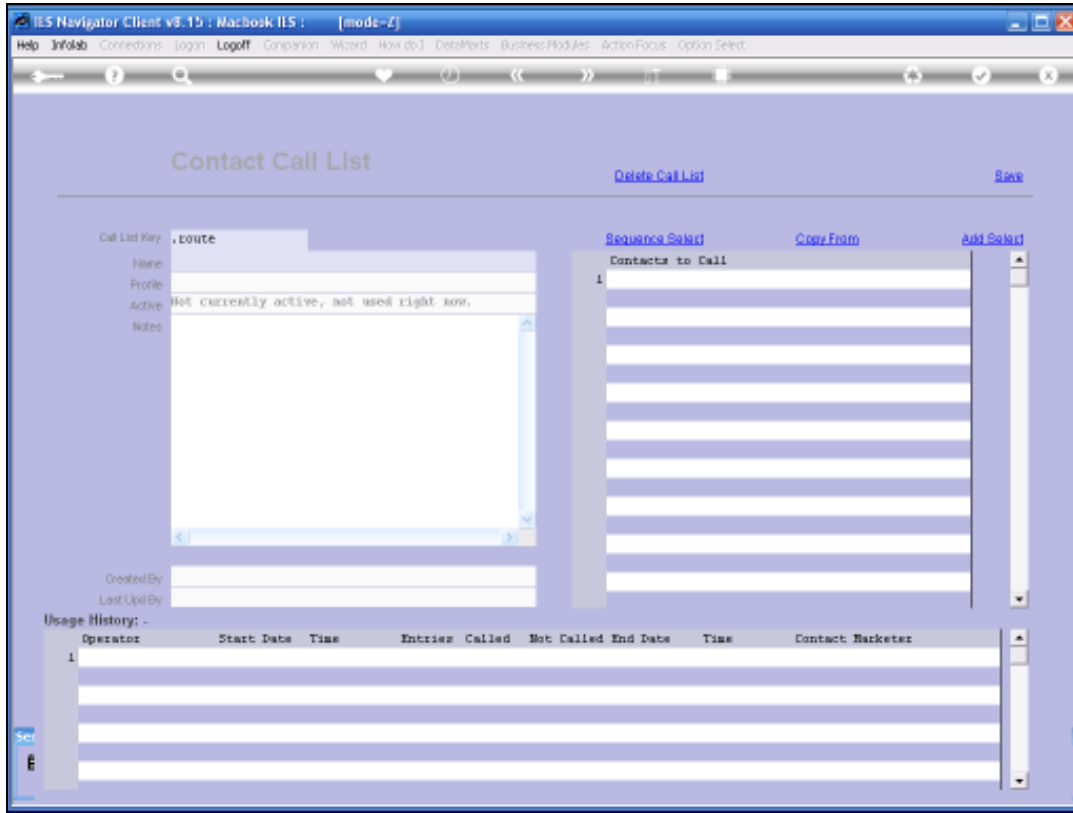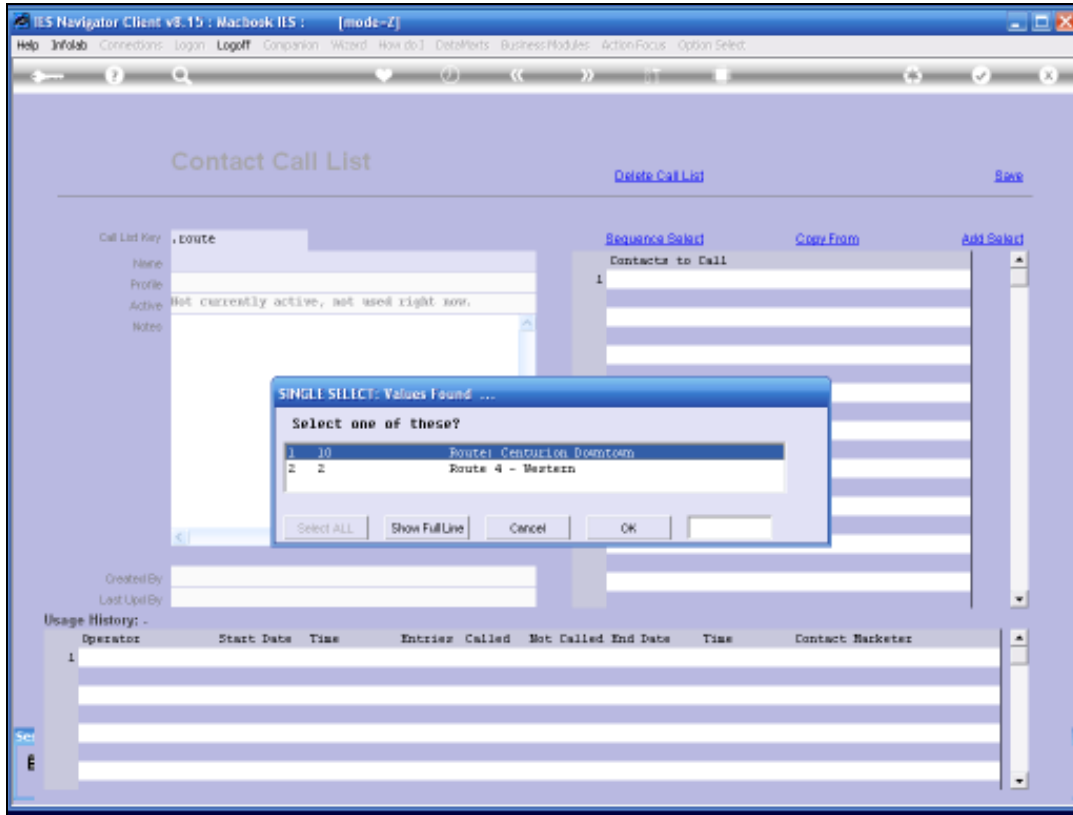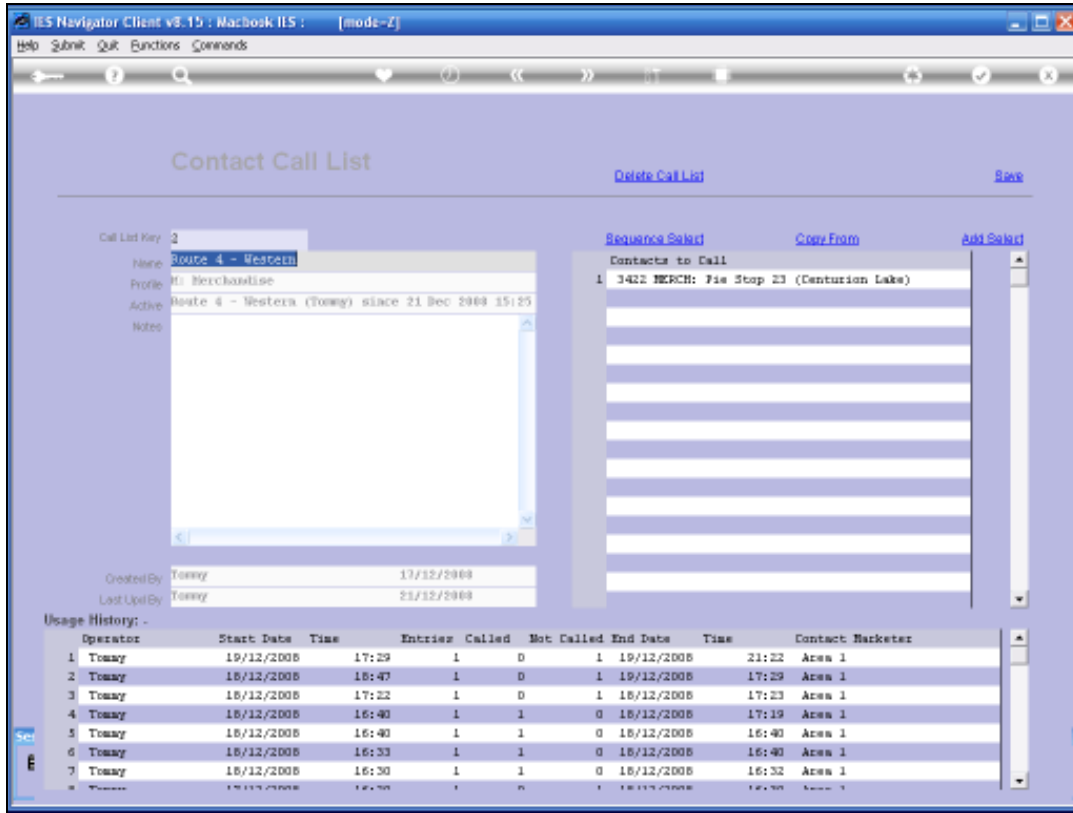Slide notes: I am going to use a lookup to find the Call List that I want to work with.
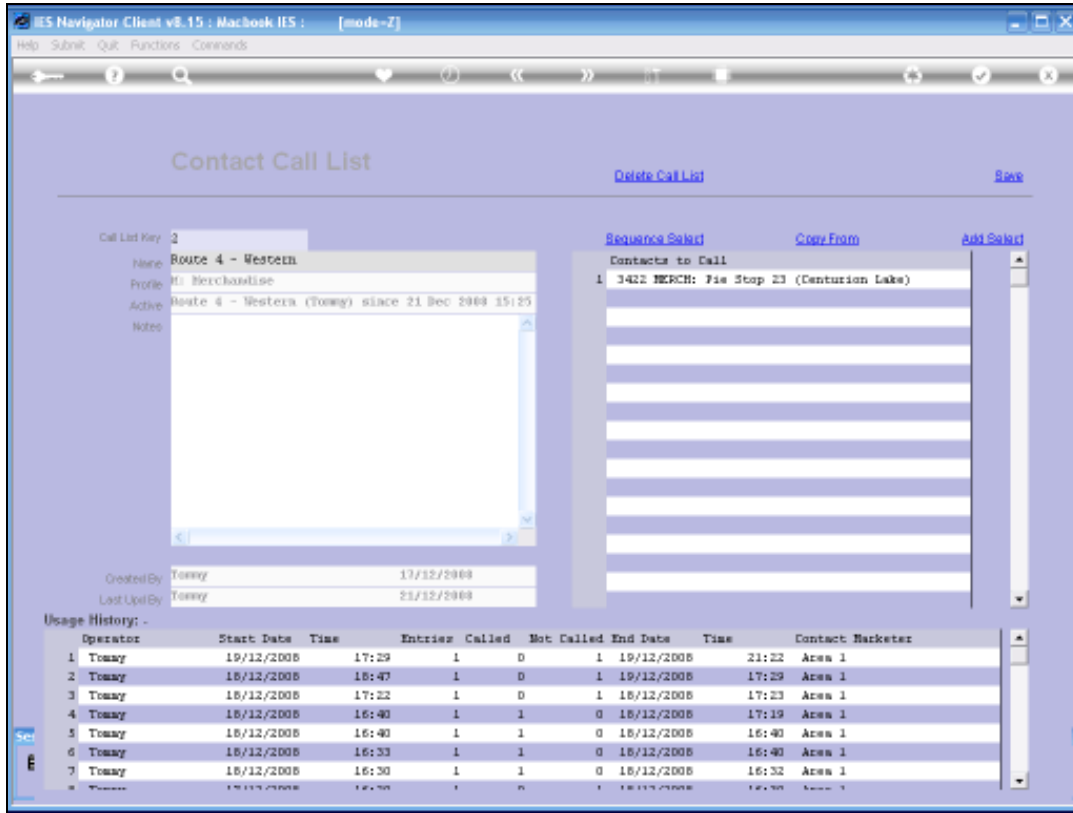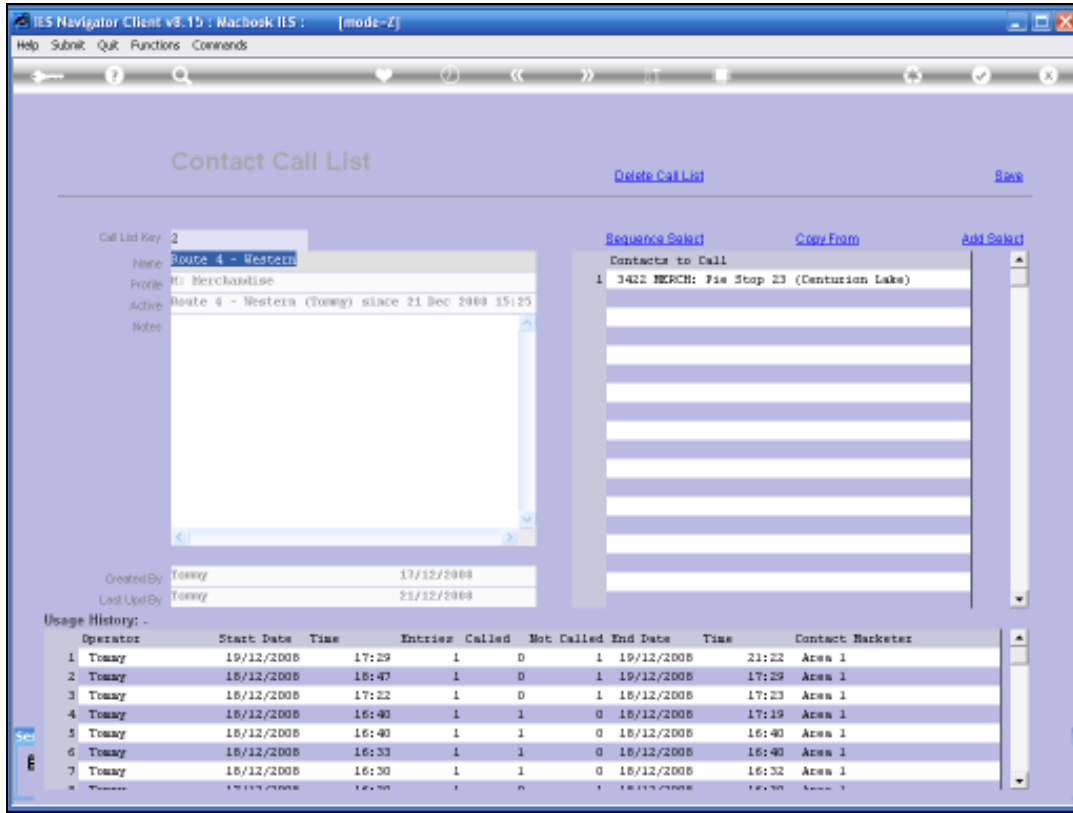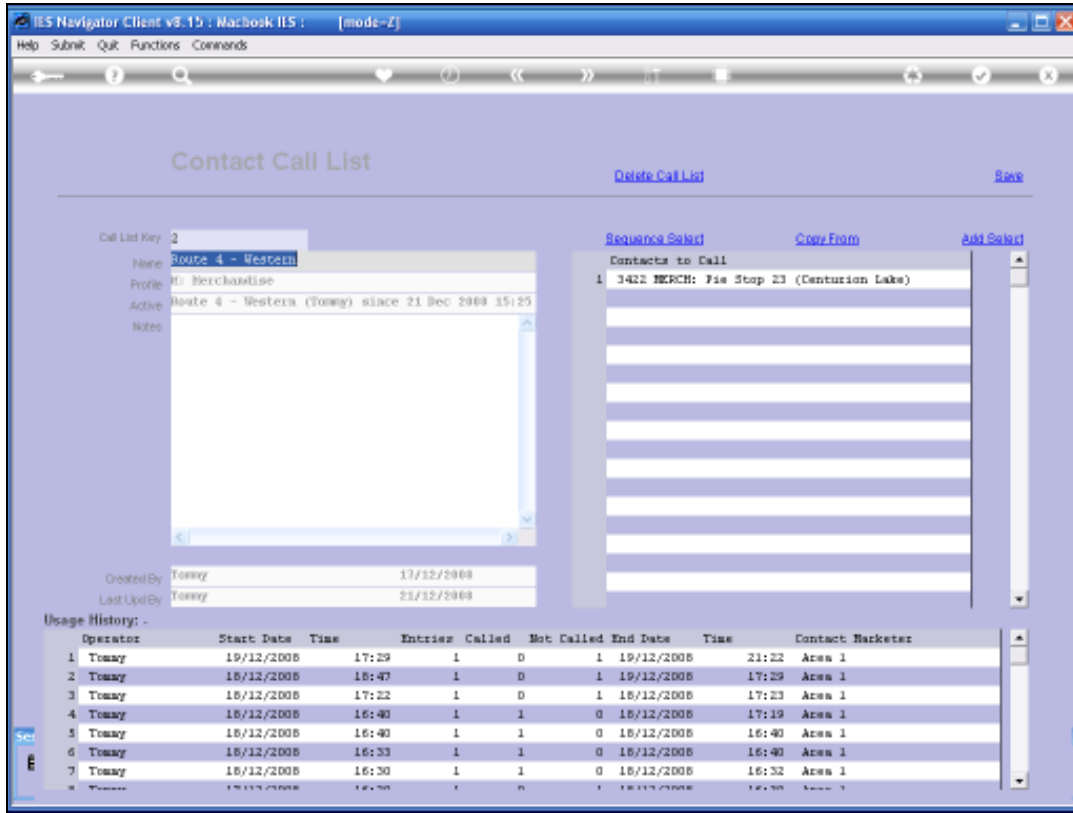
Slide 7
Slide notes:

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Slide notes:

Slide 9

Slide notes: A Call Lst always has a profile that indicates what kind of Call List it is, i.e. what kind of Contacts will we include on this Call List.
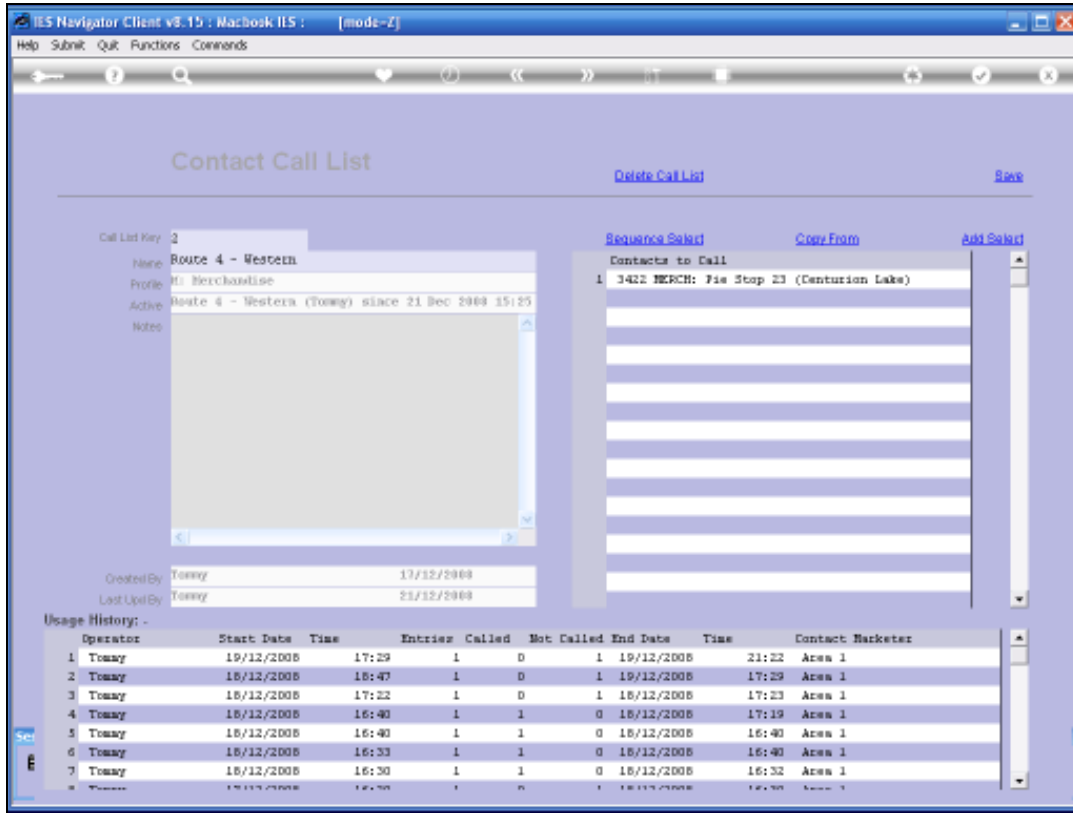
Slide 10

Slide notes: If it states a Marketing Profile at the ACTIVE field, then the Call List is right now in use by some Marketer, executing calls from this List. That does not mean that we cannot work with or change it now, because the system will be managing a 'working copy' of the Call List for the Marketer, separate and apart from this Master copy. If the list is not currently in use, it will say so.
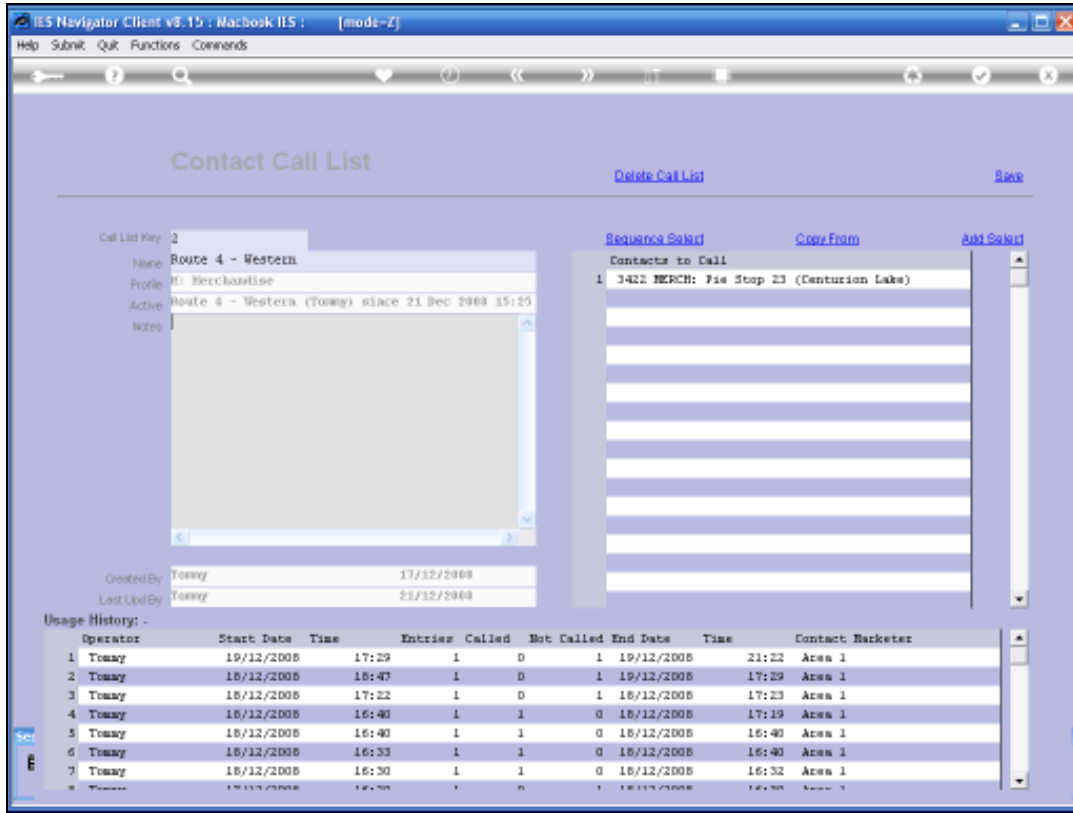
Slide 11
Slide notes: There is a NOTES area where the Administrator can record notes about this List, if applicable.
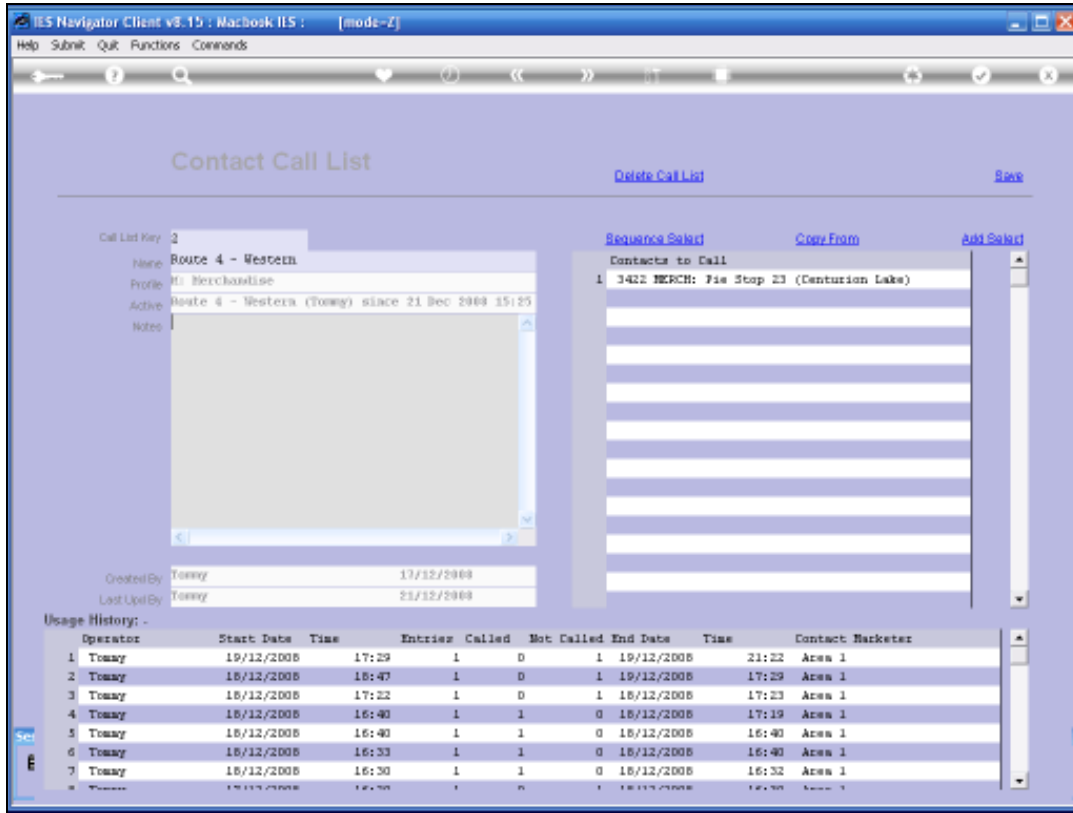
Slide 12

Slide notes: A Call List always indicates when and by whom it was 1st created and also when last changed or updated.
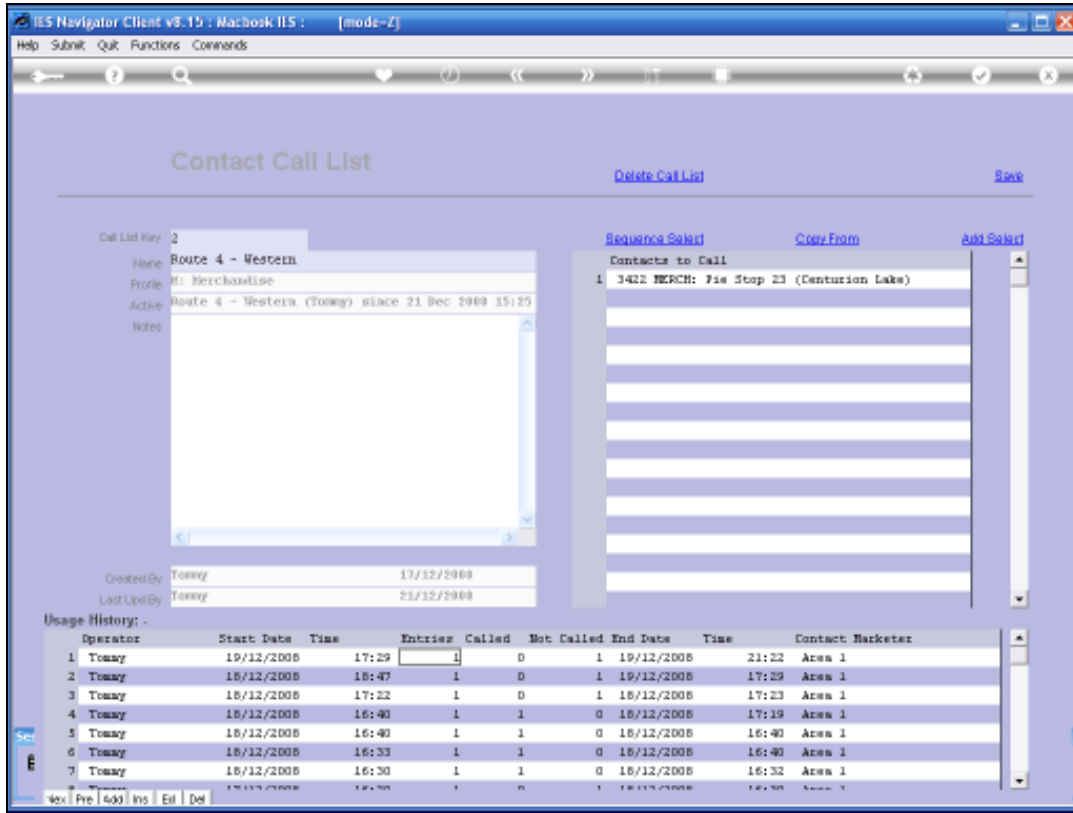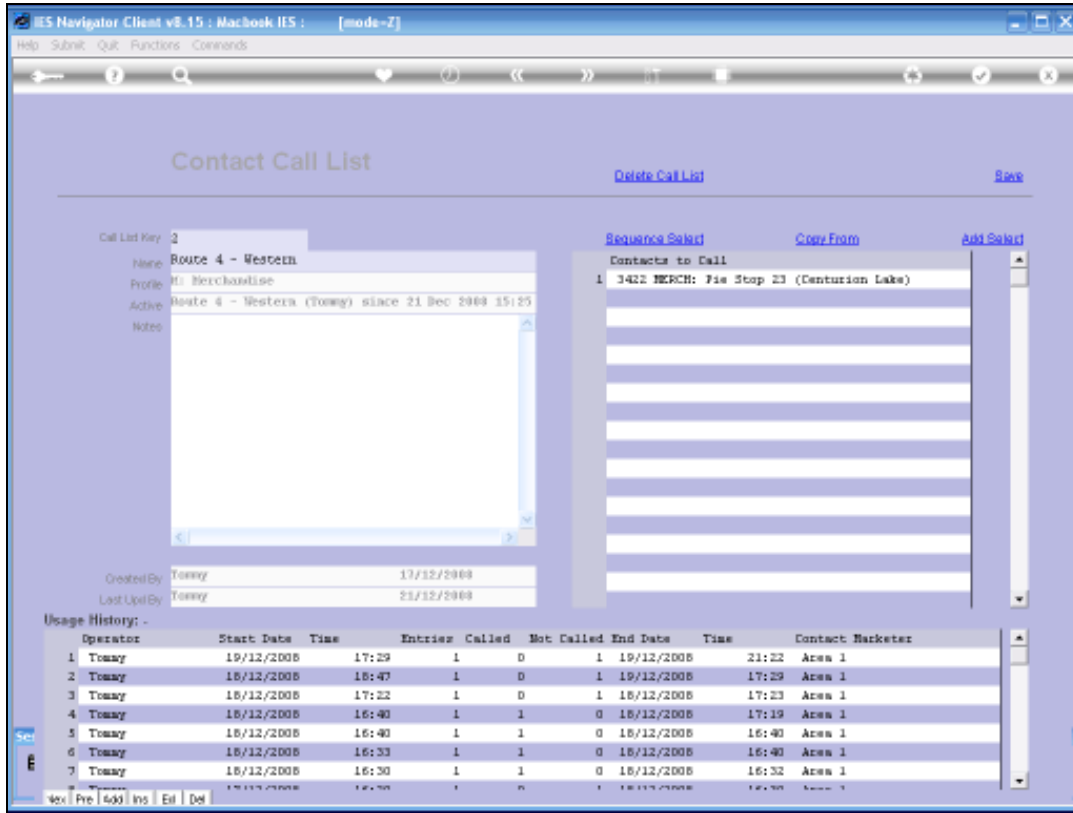
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Slide notes:

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Slide notes: We can also see all instances of the Call List being applied or used by a Marketer.
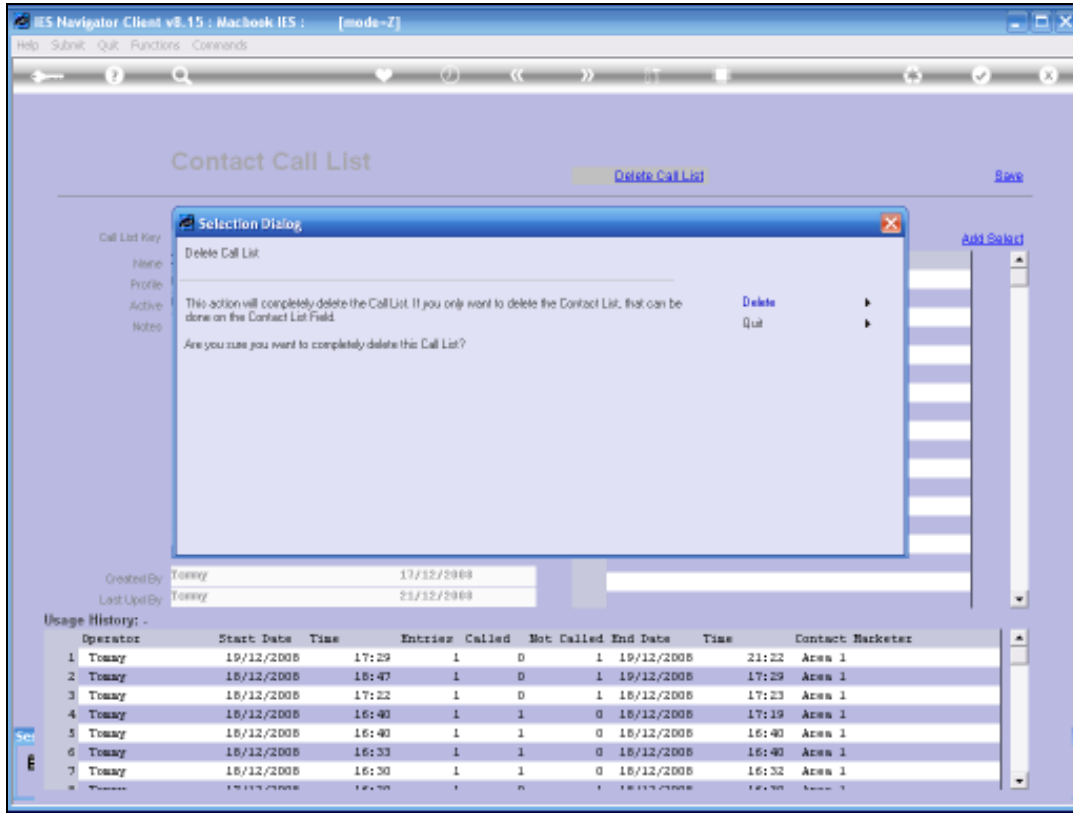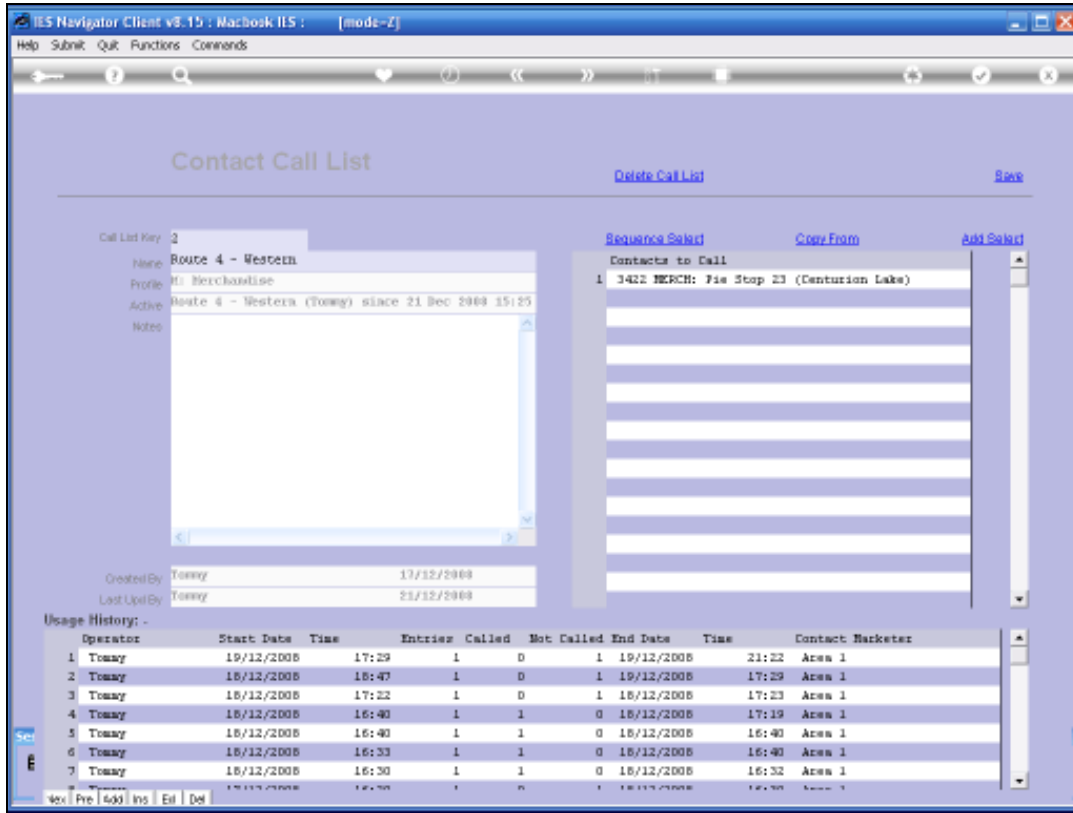
Slide 15
Slide notes:

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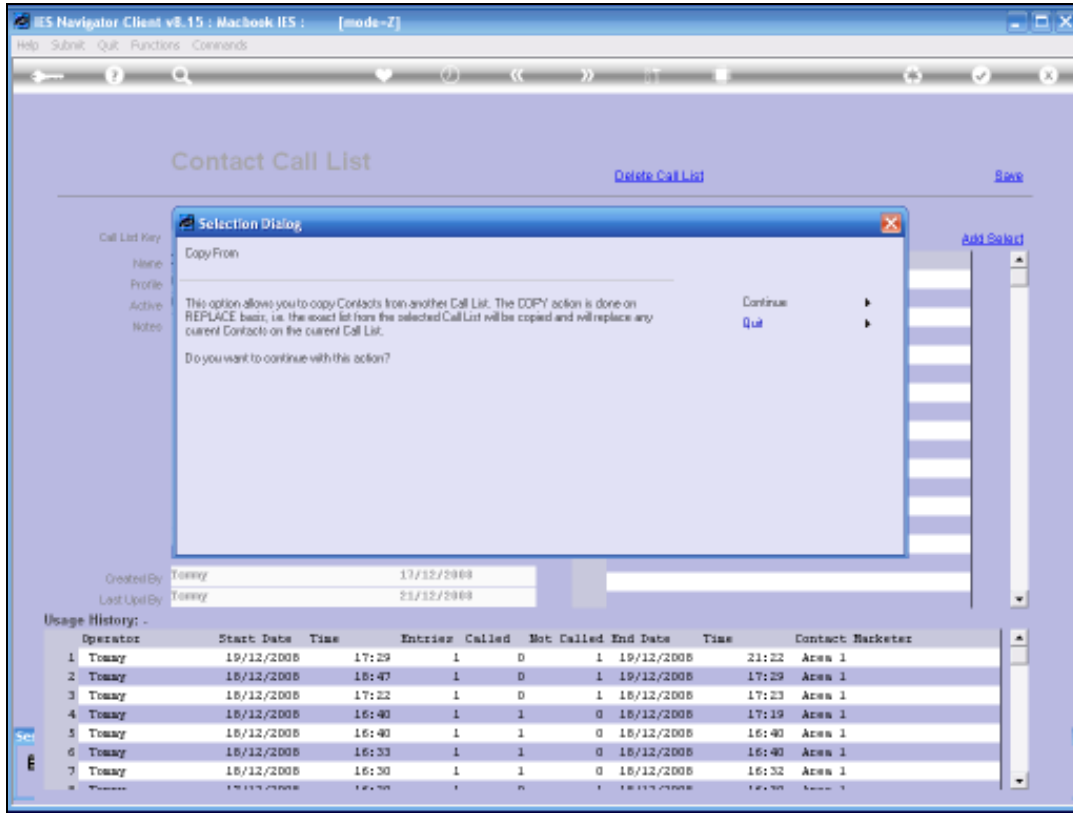Slide notes: Can a Call List be deleted? Yes it can.
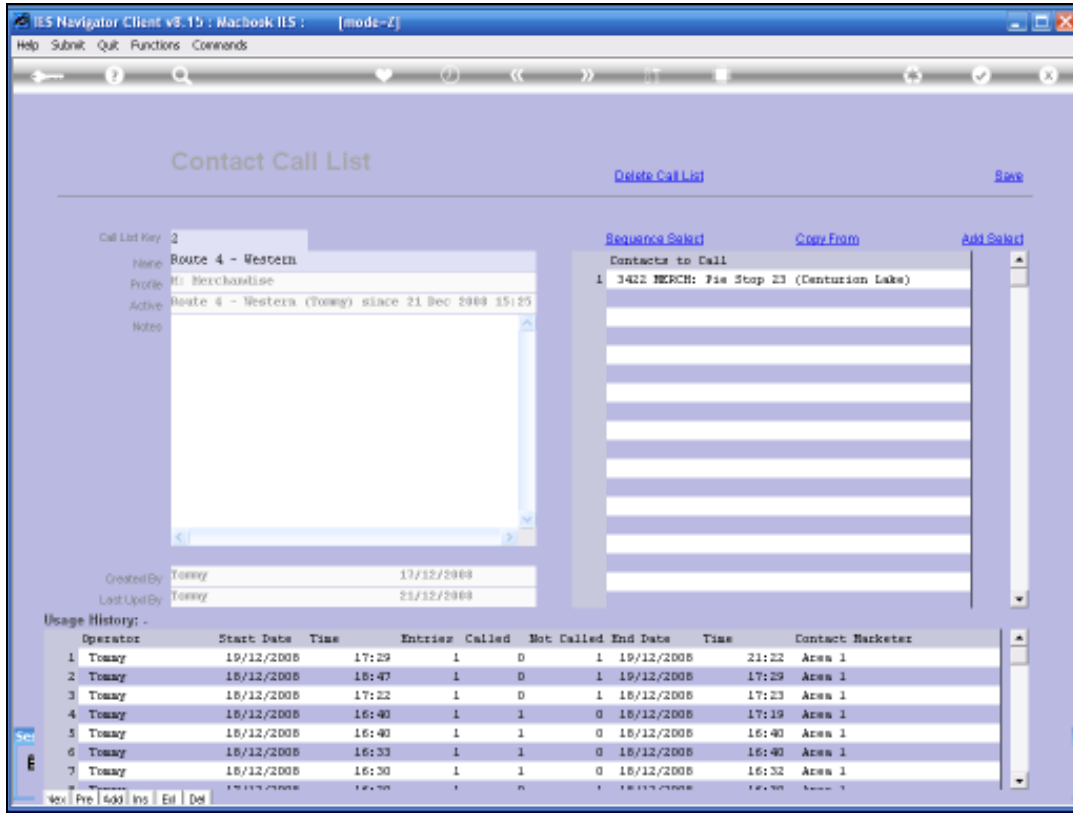
Slide 17
Slide notes:

Slide 18

Slide notes: We can copy Contacts from another List in cases where that is convenient.
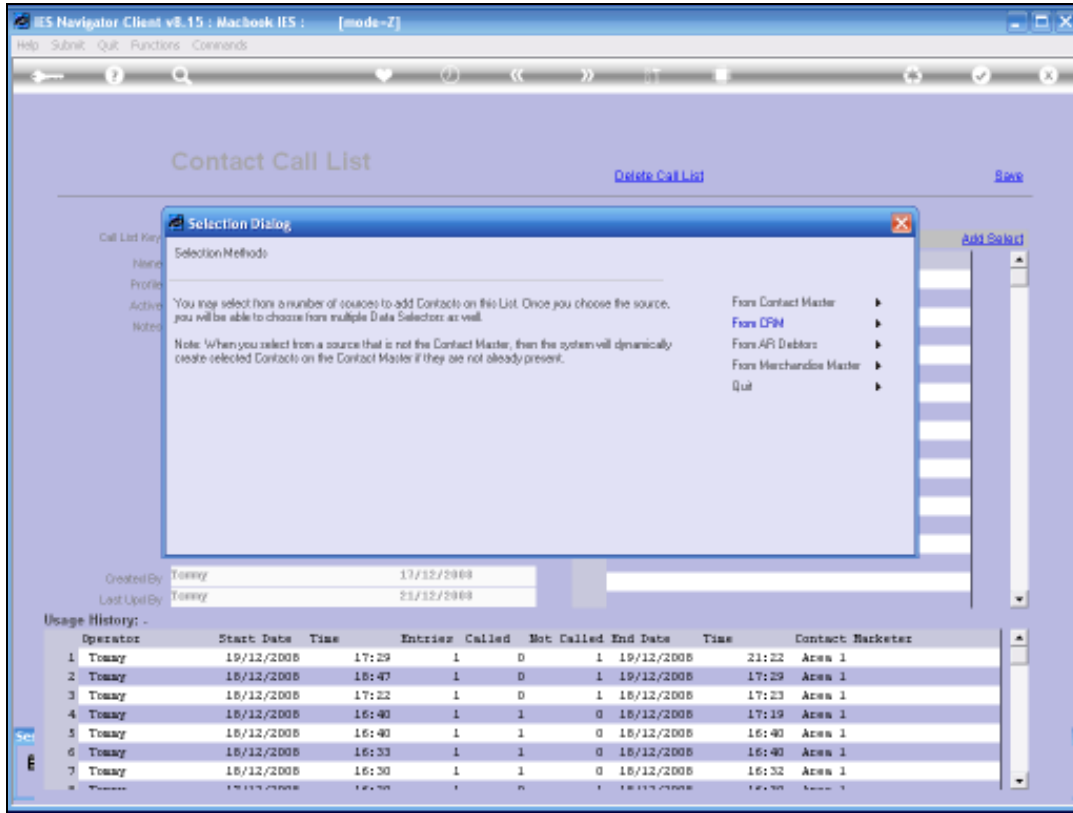
Slide 19

Slide notes:

Slide 20

Slide notes: But more often than not, we use the ADD/SELECT function to select Contacts to add to this list.
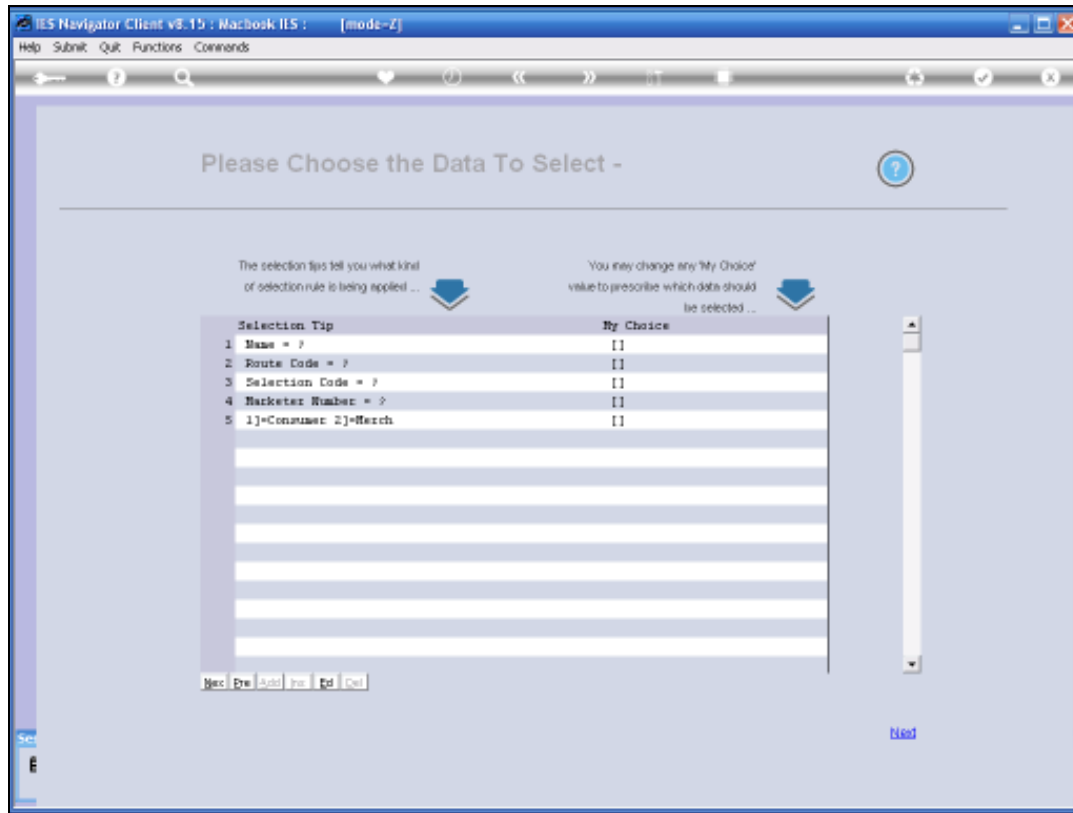
Slide 21

Slide notes: We can add Contacts from the Contact Master itself, from CRM, from Debtors and from Merchandise. The interesting point to note here is that when we add from another source other than the Contact Master itself, then the system will still allow us to select Accounts that are not yet on the Contact Master, and any such Accounts will be dynamically generated onto the Contact Master when we select them. Of course, entries that are already present on the Contact Master will not be duplicated.
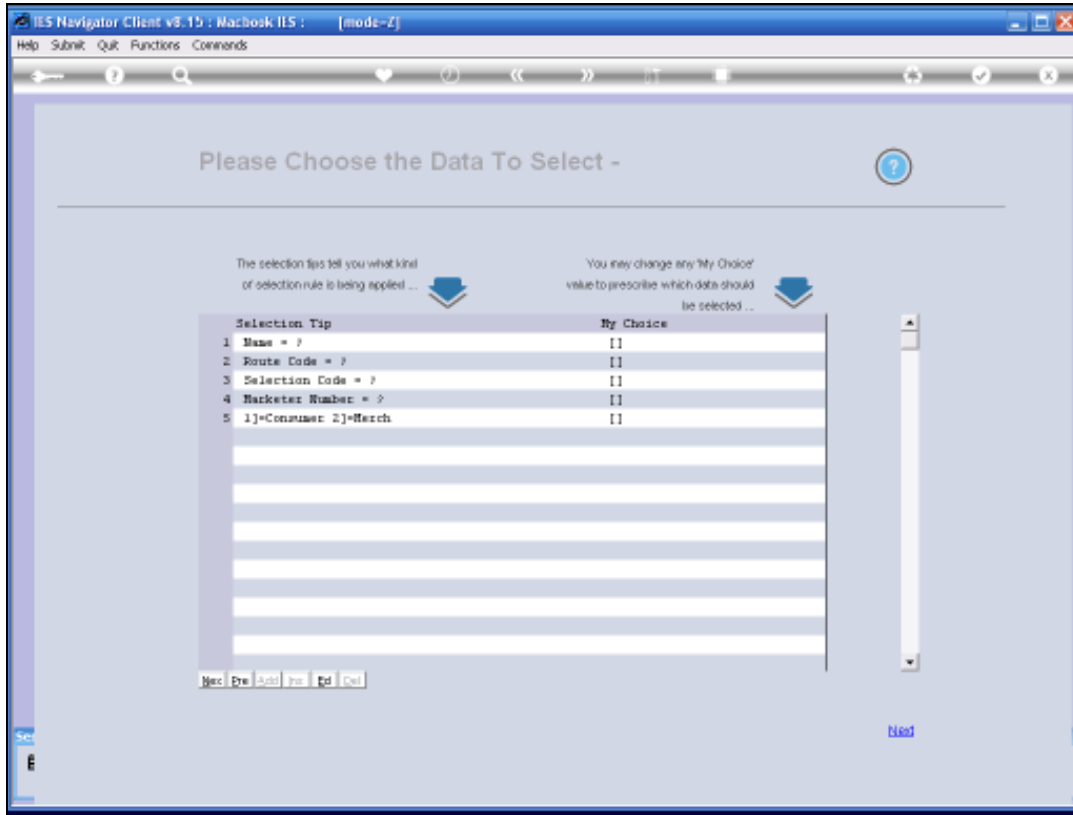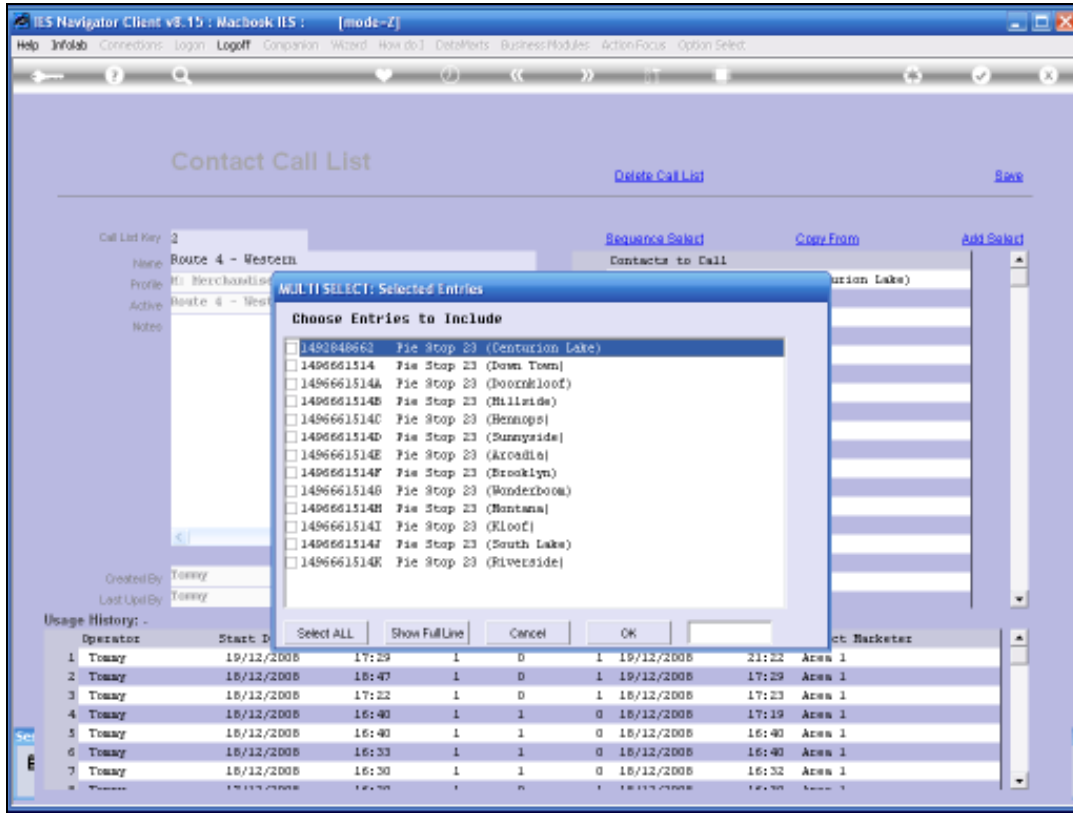
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Slide notes:

Slide 23

Slide notes: Any choice of source selection will produce a Data Selector where we can specify which Accounts to select from.
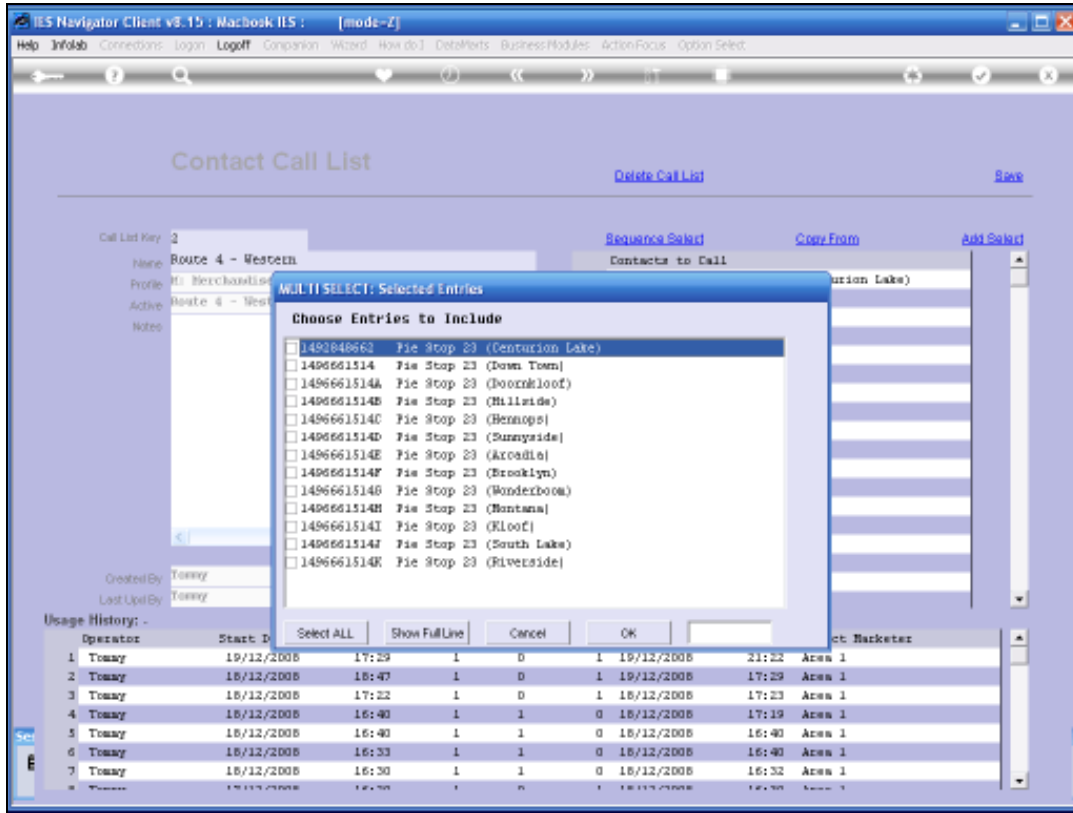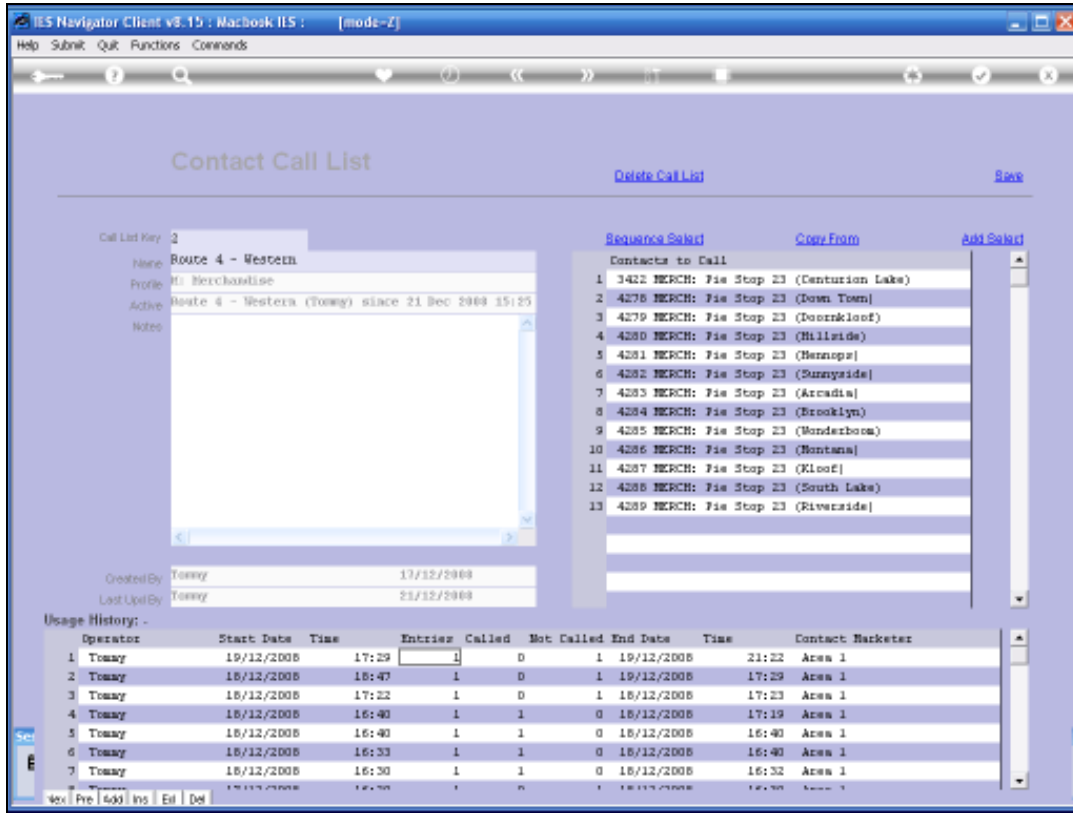
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Slide notes:

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Slide notes:

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Slide notes: We can re-select the sequence in which the Contacts appear on the Contact List, because this is also the call sequence that will be used for the Marketer when activating this List. Although we may note that the Marketer also has a function to re-organize the List when using it.
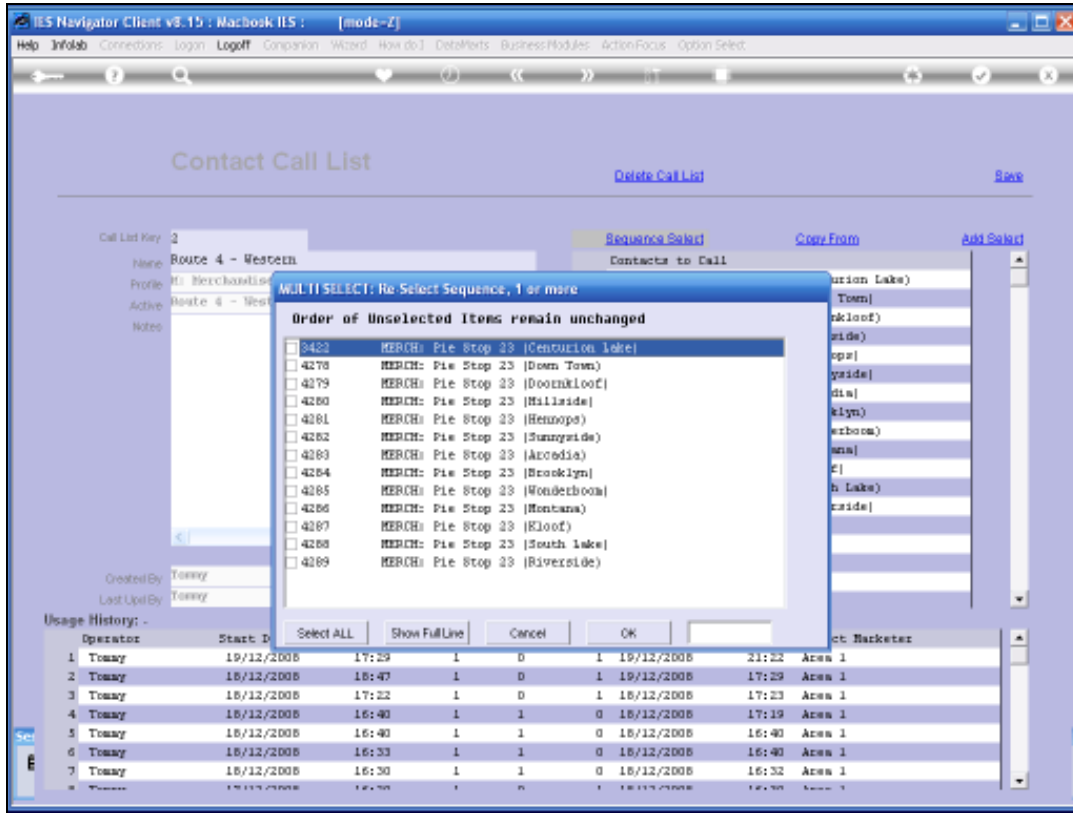
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Slide notes:

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Slide notes:

Slide 29
Slide notes:
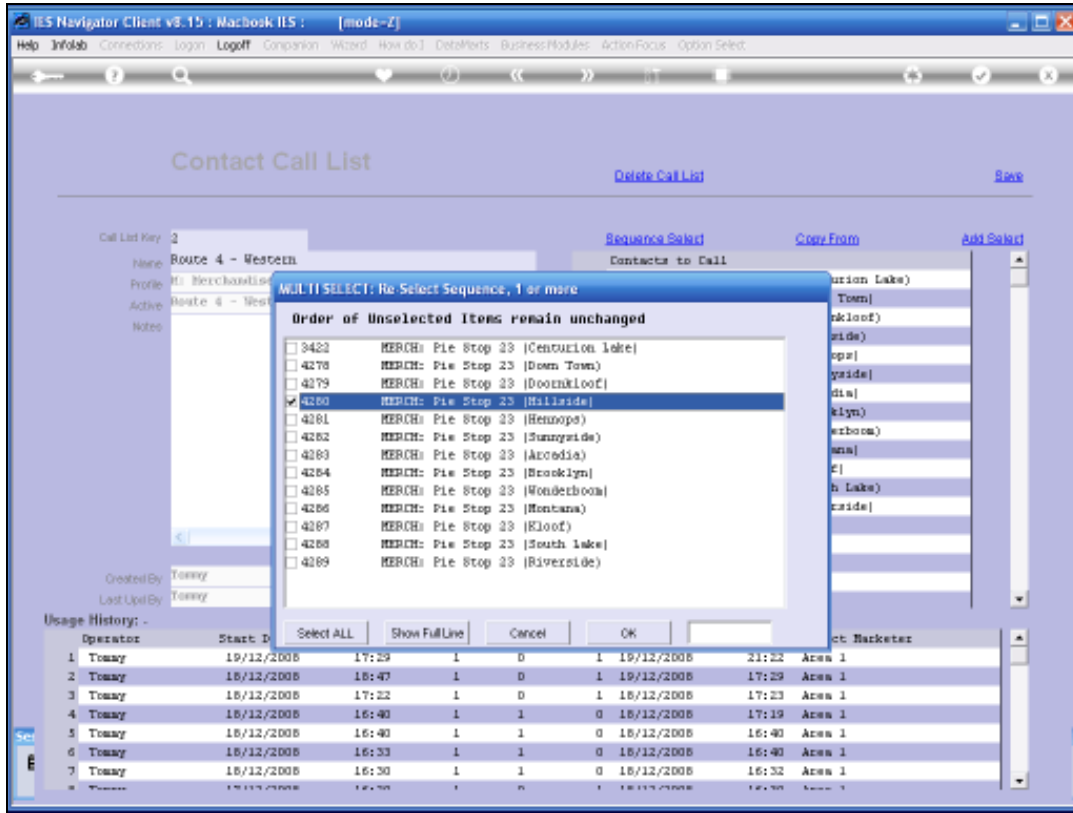
Slide 30
Slide notes:
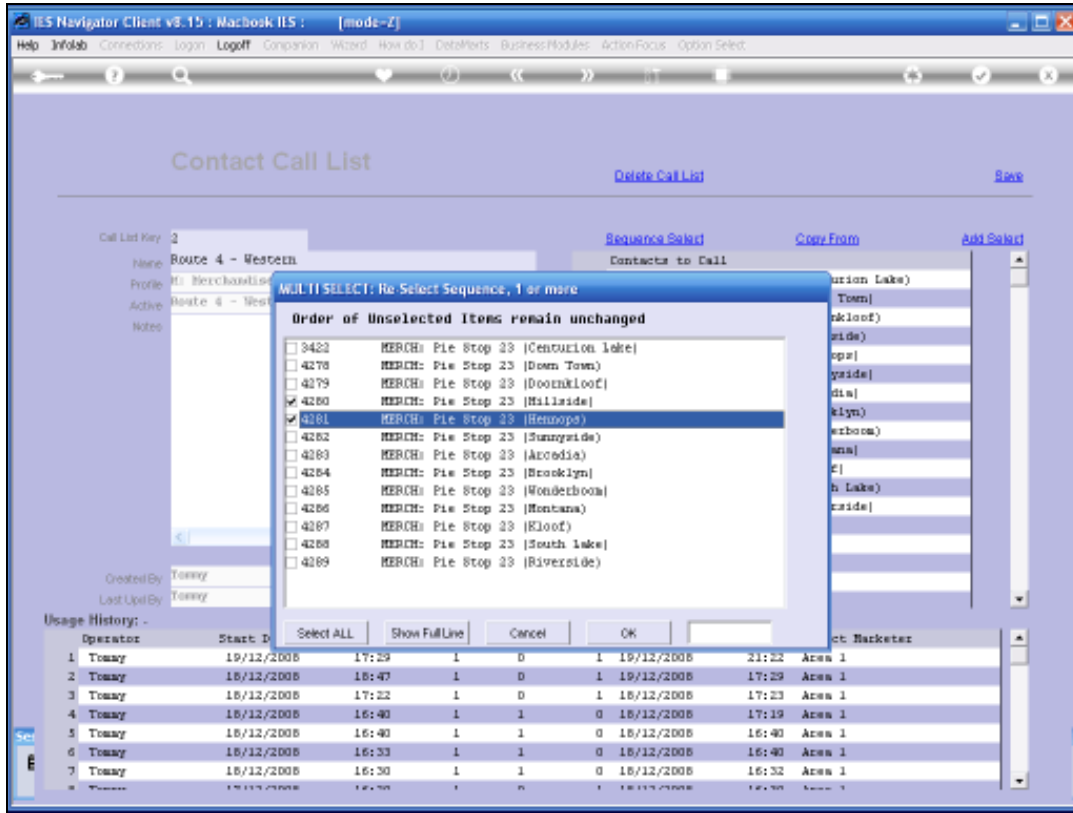
Slide 31

Slide notes: Any selected Contacts, in the order as selected, will move to the top of the List.
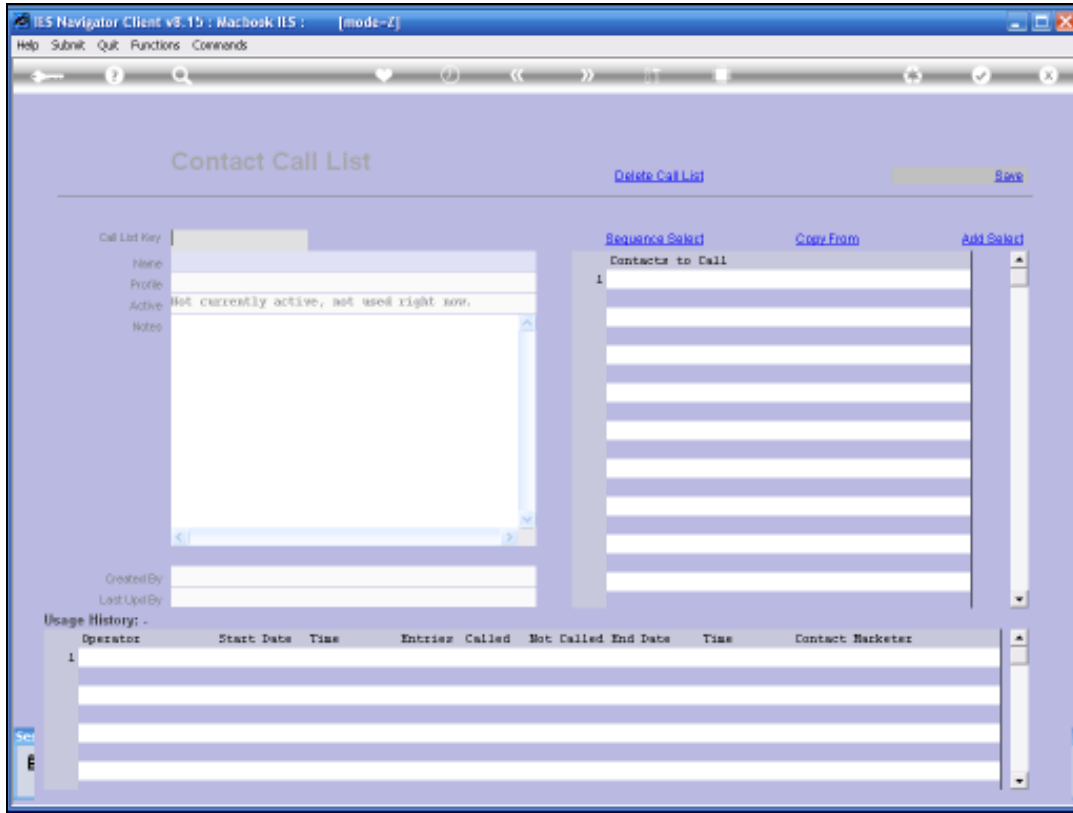
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Slide notes:

Slide 33
Slide notes:

Slide 34

Slide notes: Of course, no changes to the Call List are permanent until we apply the SAVE option.

Slide 35
Slide notes: