

Contact Marketing

MY :

	Calls	Orders	Sales
Today	185	44	11,559.00
Yesterday	94	43	5,210.00
This Week	498	482	44,900.00
Last Week	442	325	50,400.00
This Month	1512	1071	166,300.00
Last Month	1195	735	150,150.00

ALL :

	Calls	Orders	Sales
Today	429	630	44,200.00
Yesterday	316	352	34,960.00
This Week	2134	1848	267,360.00
Last Week	1860	1250	203,200.00
This Month	9840	4294	605,200.00
Last Month	5440	2980	400,600.00

Dashboard

Current Node: **104: Route 1 - DownTown - (Closed)**

Call List: [Change](#)

[Query Call List](#)
[Activate Call List](#)
[Deactivate Call List](#)
[Execute Call List](#)
[Release Call List](#)

To Open a Single Contact - [On Demand Contact](#)

Active Call List Indicators:

List Description:

Inter-Activated:

Total Orders:

Group/Code:

Total Revenue:

Reports **File Maintenance** **Administration and Control**

Call Lists **General** **General Contact Master** **Diary**

[Call List Master](#) [Contact Master](#) [Maintain Contact Master](#) [Tasks: Submit New](#)

[Call List Detail](#) [Contact Marketing](#) [Contact Masters](#) [Tasks: Perform](#)

[Contact on Call List](#) [Call Statistics](#) [New Call List](#) [Tasks: Fill](#)

[Contact on multi Call List](#) [Events and Non-Calls](#) [Call List Master](#) [Tasks: List/Active](#)

[Buttons](#) [Tasks: Check Progress](#) [Local](#)

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.

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

Help Submit Quit Functions Commands

Contact Call List

Delete Call List Save

Call List Key

Name

Profile

Active: Not currently active, not used right now.

Notes

Sequence Select Copy From Add Select

Contacts to Call

1

Created By

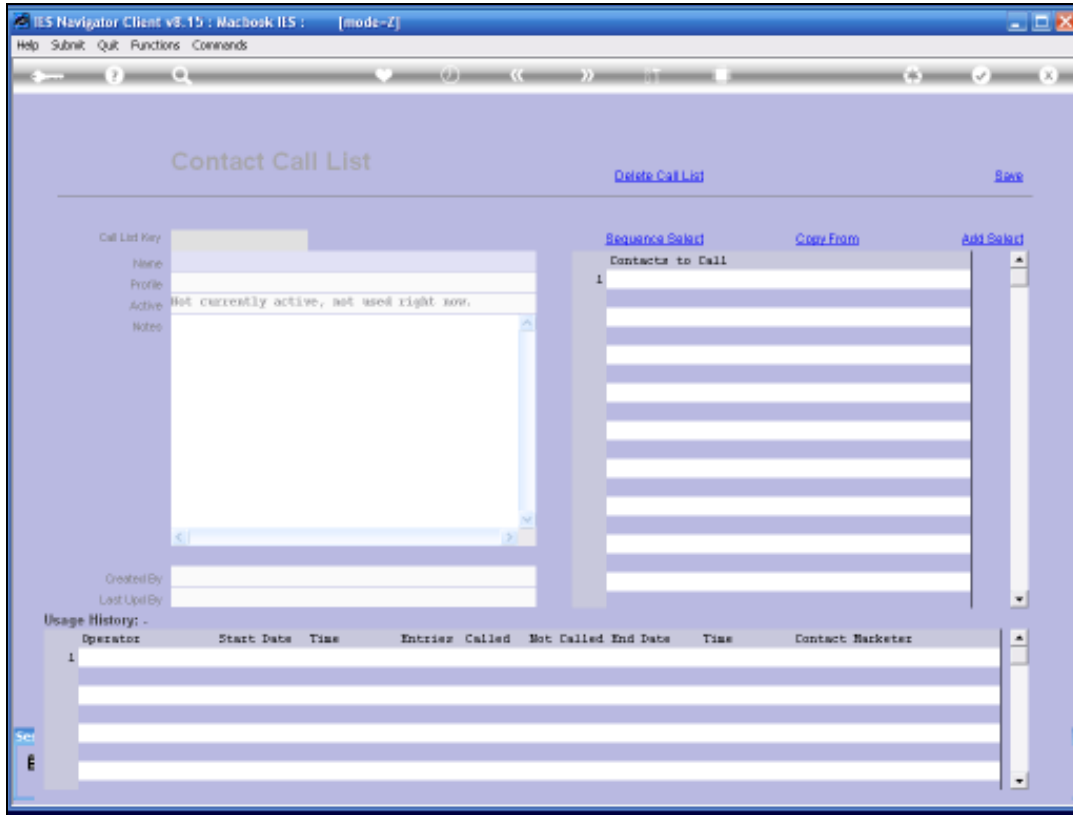
Last Used By

Usage History: -

Operator	Start Date	Time	Entries	Called	Not Called	End Date	Time	Contact Marketer
1								

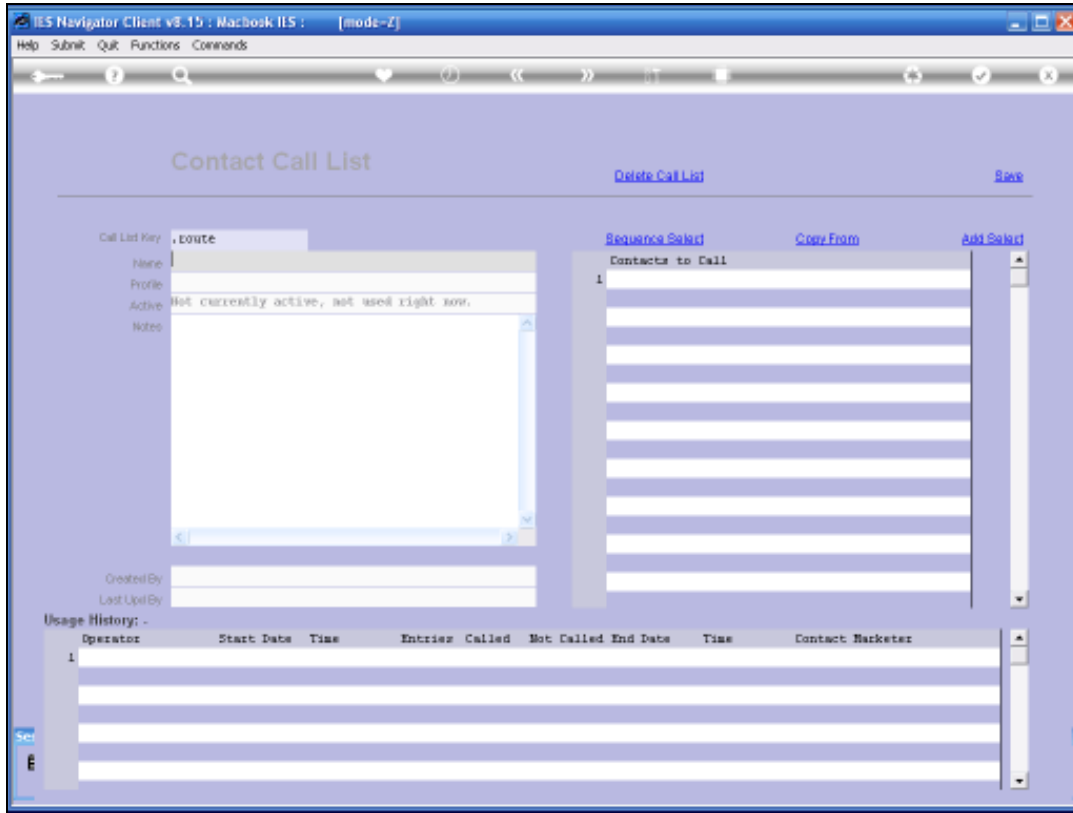
Slide 2

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.



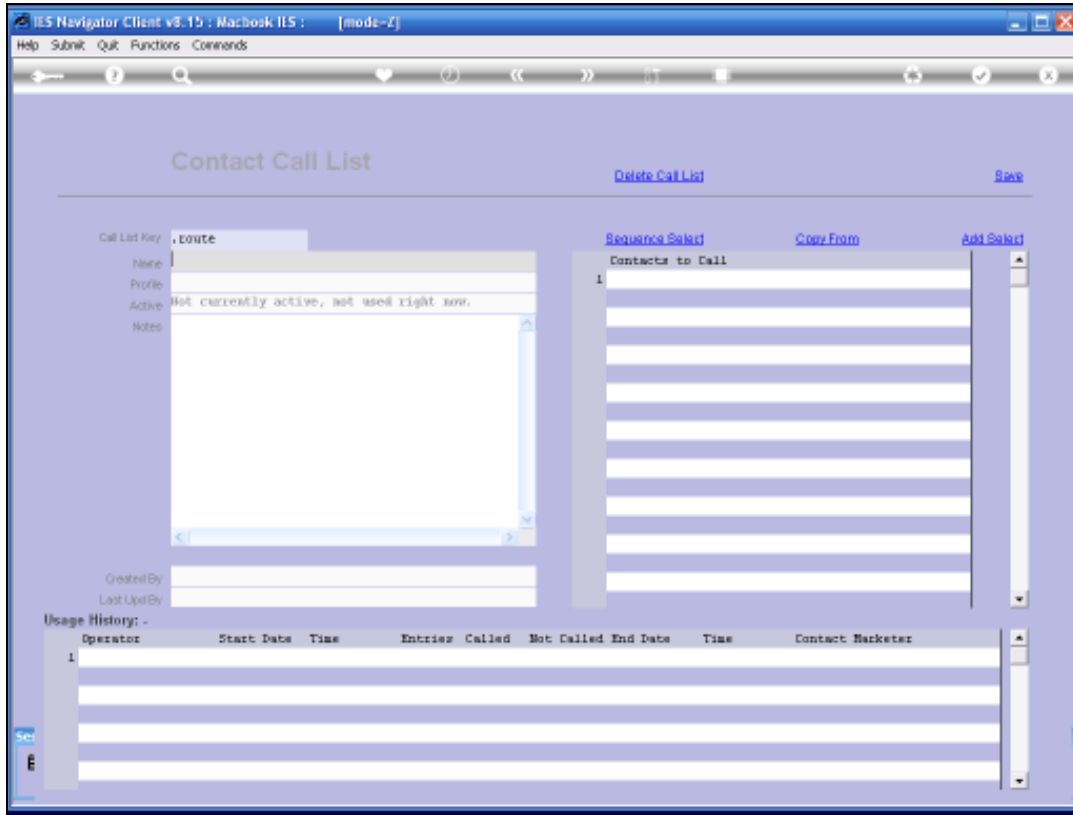
Slide 3

Slide notes:



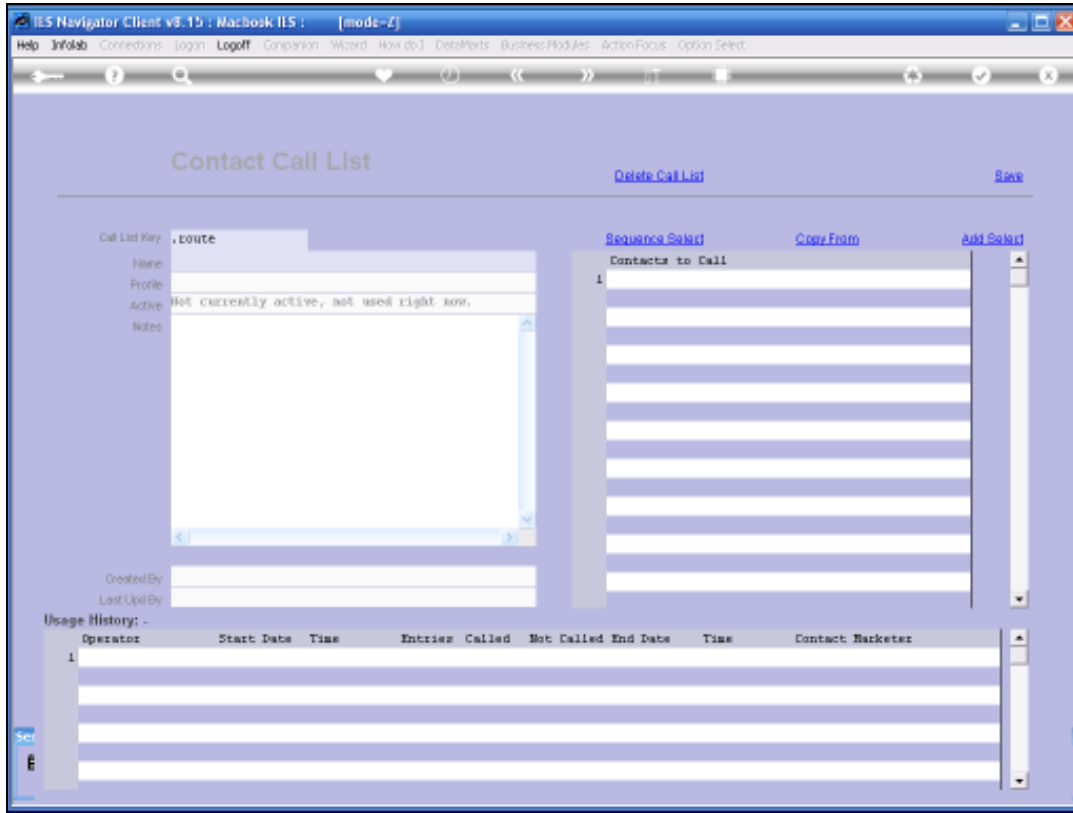
Slide 4

Slide notes:



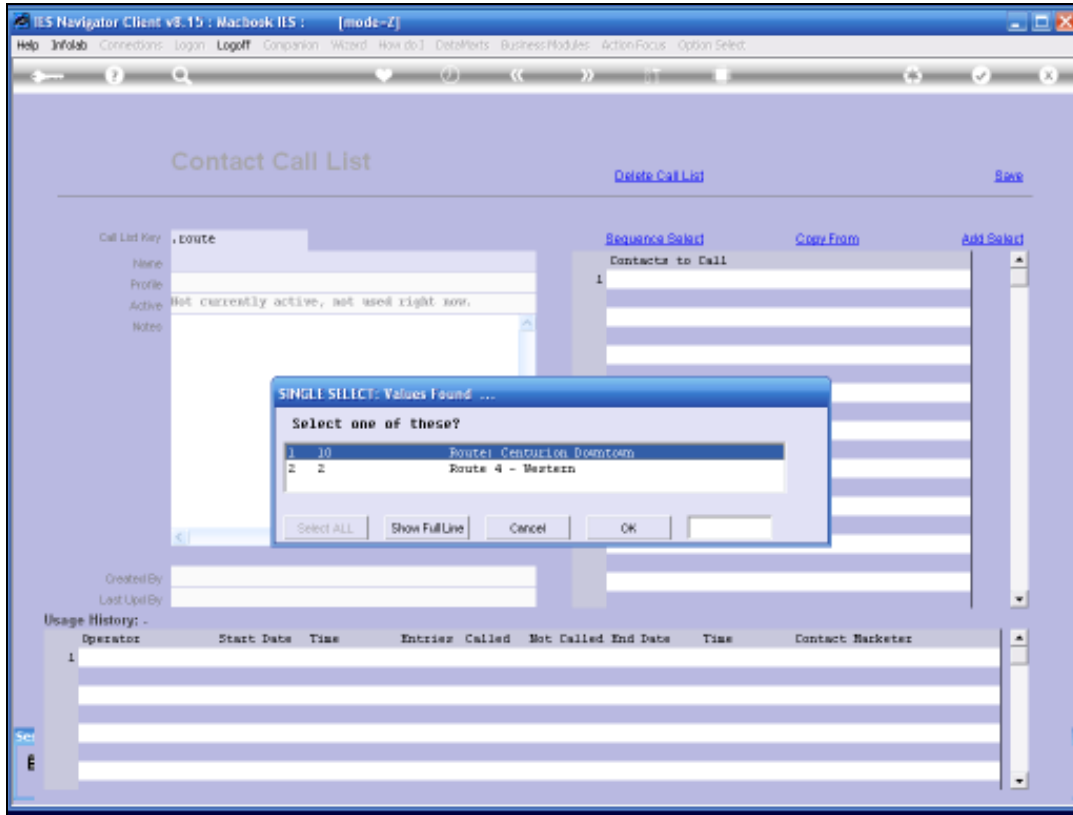
Slide 5

Slide notes:



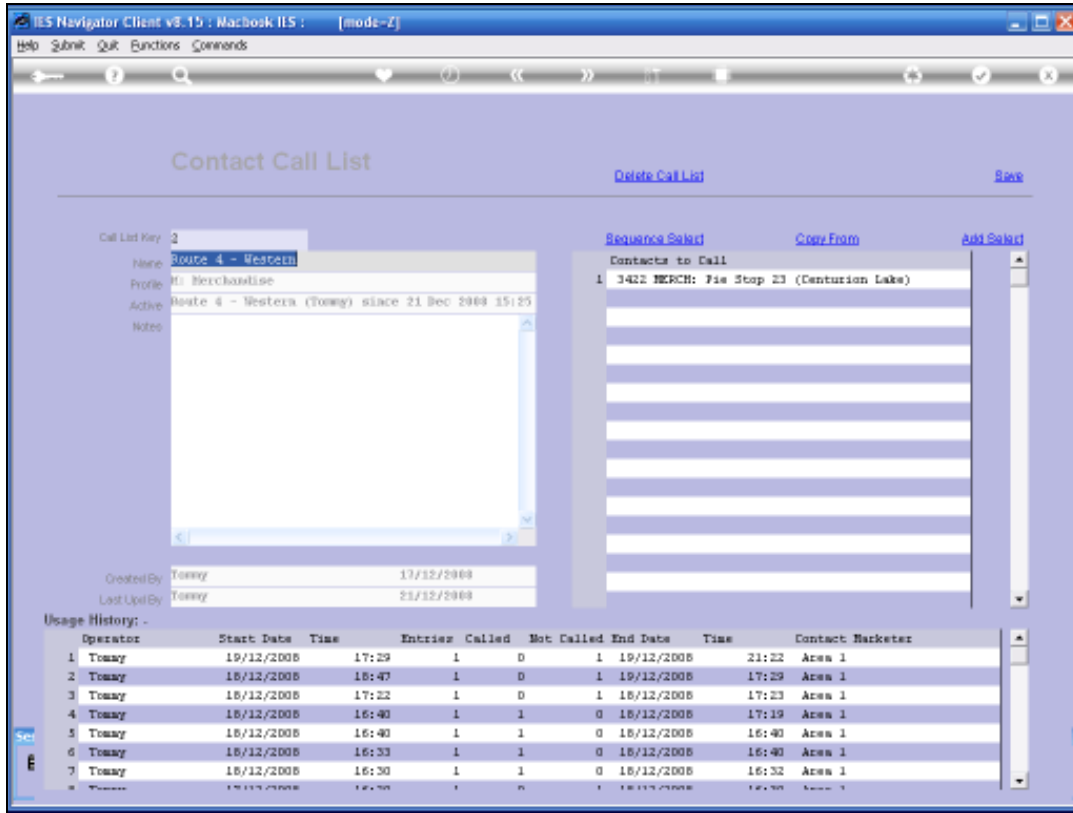
Slide 6

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



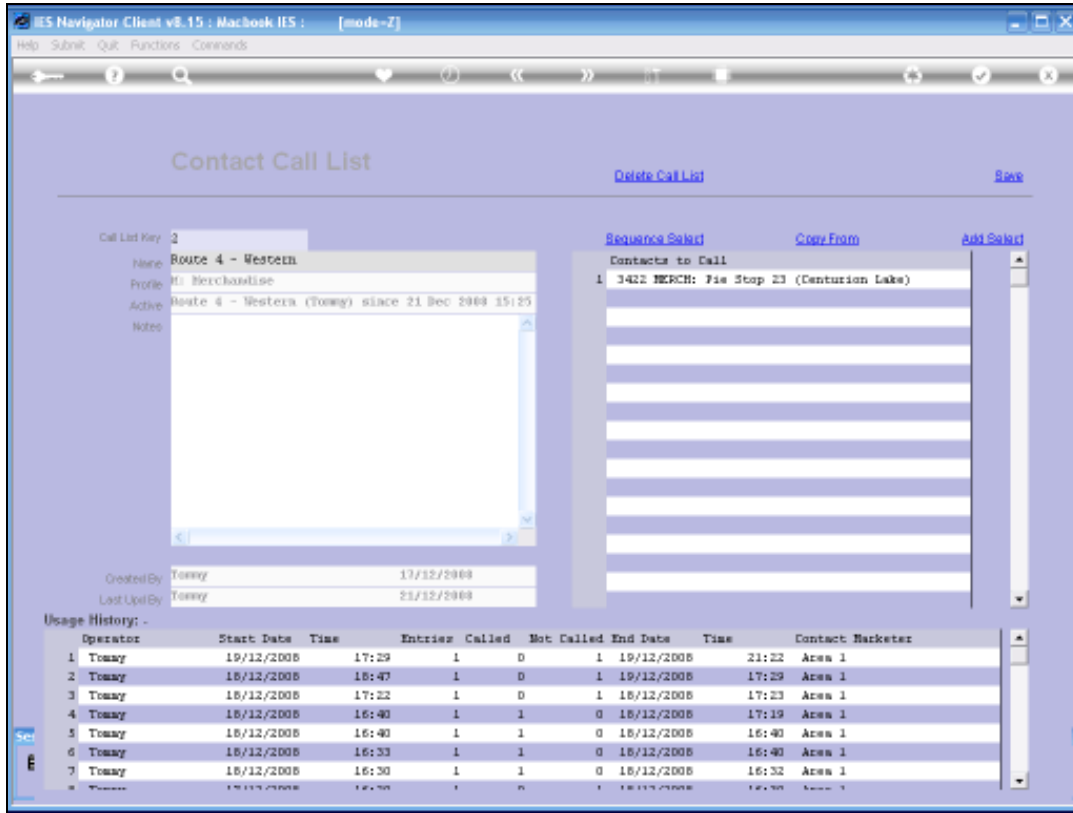
Slide 7

Slide notes:



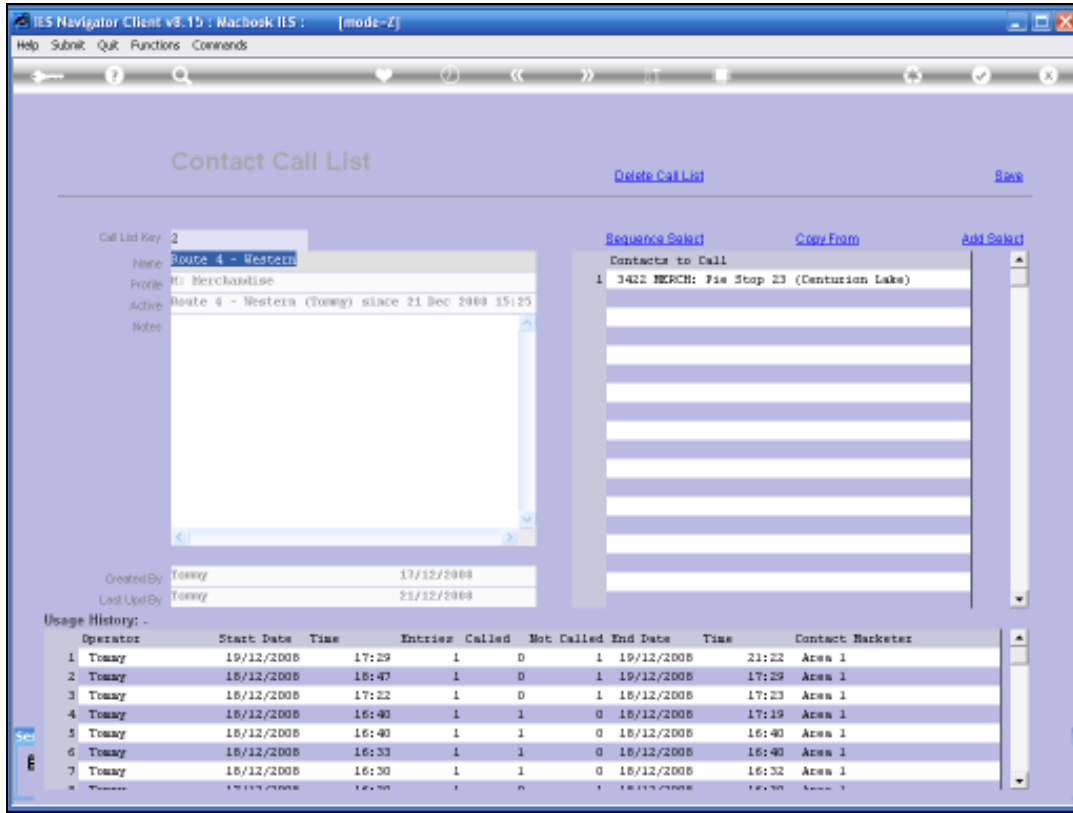
Slide 8

Slide notes:



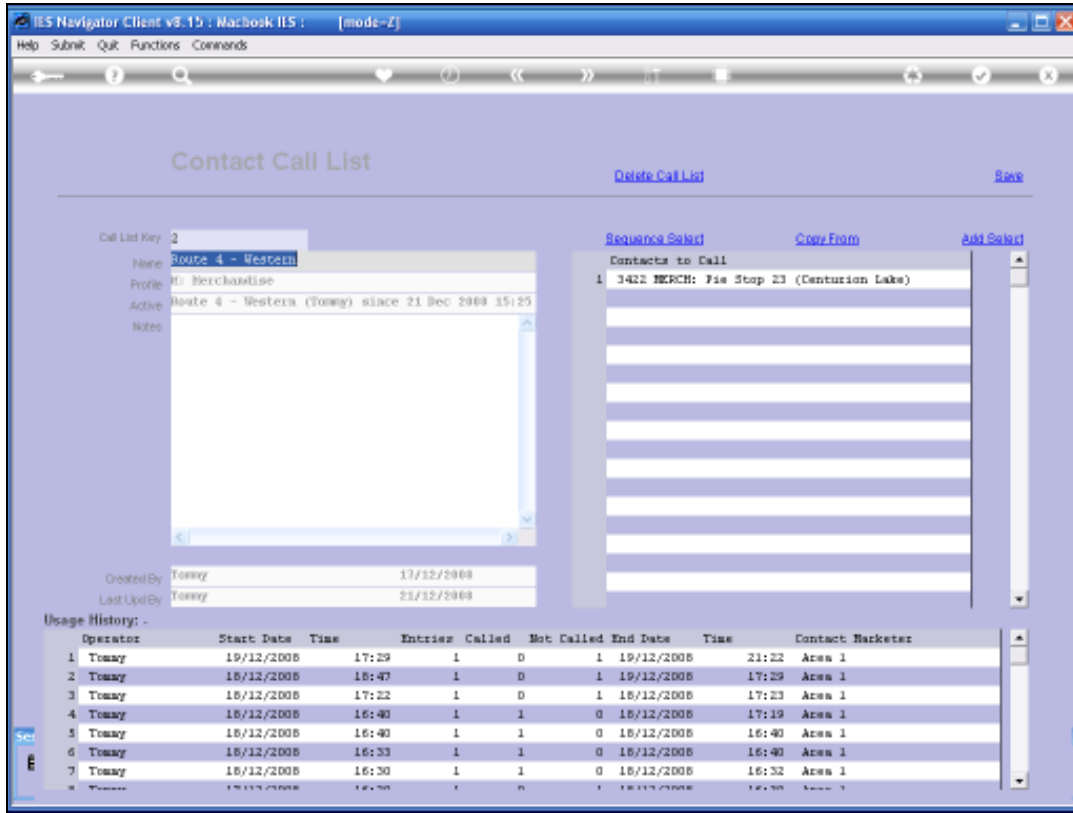
Slide 9

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.



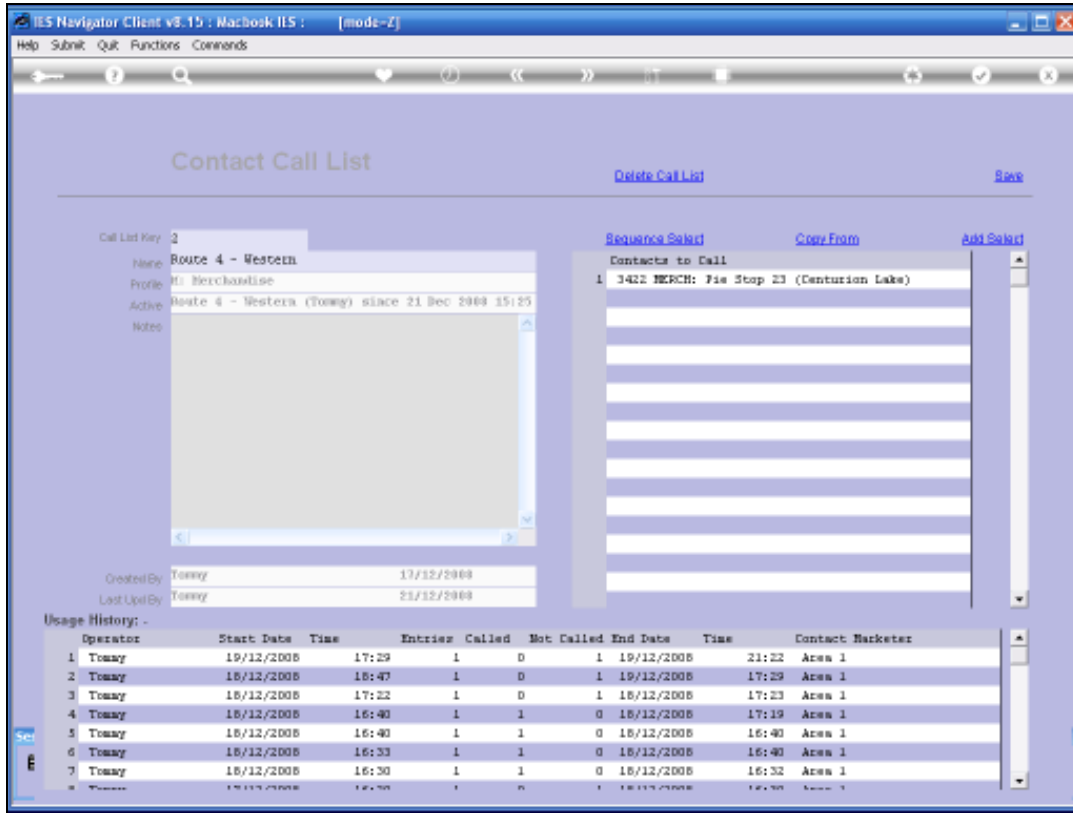
Slide 10

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.



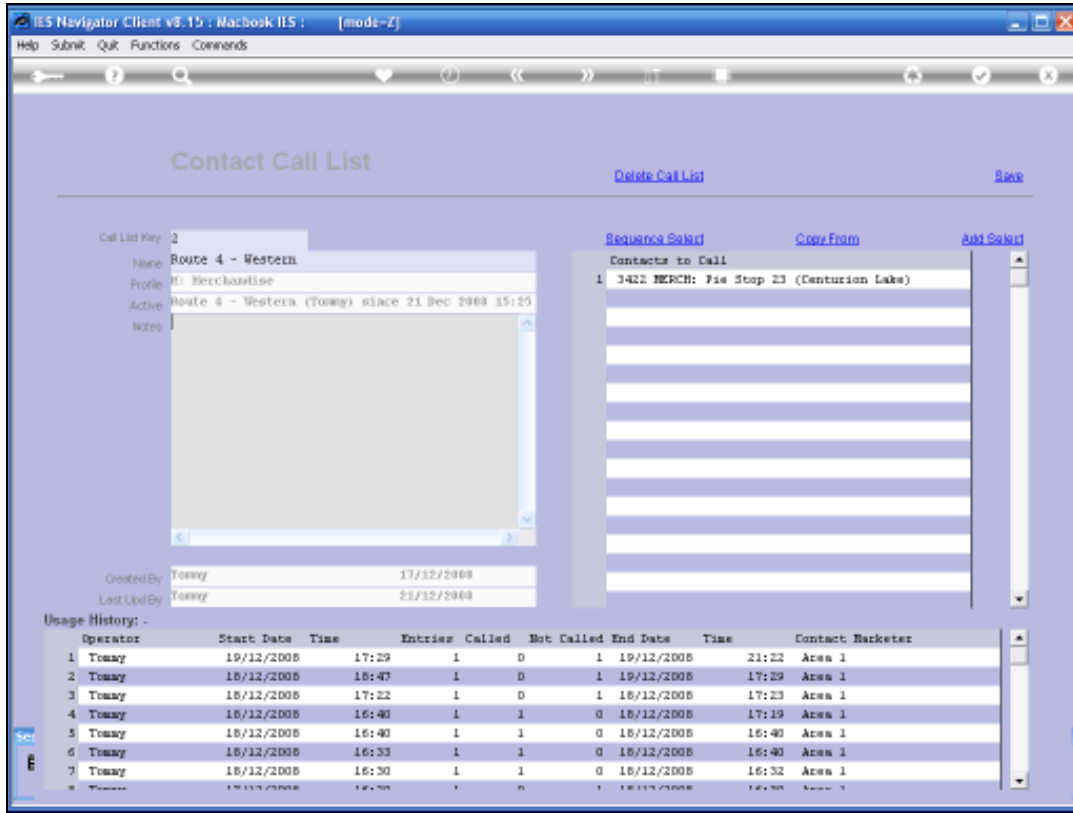
Slide 11

Slide notes: There is a NOTES area where the Administrator can record notes about this List, if applicable.



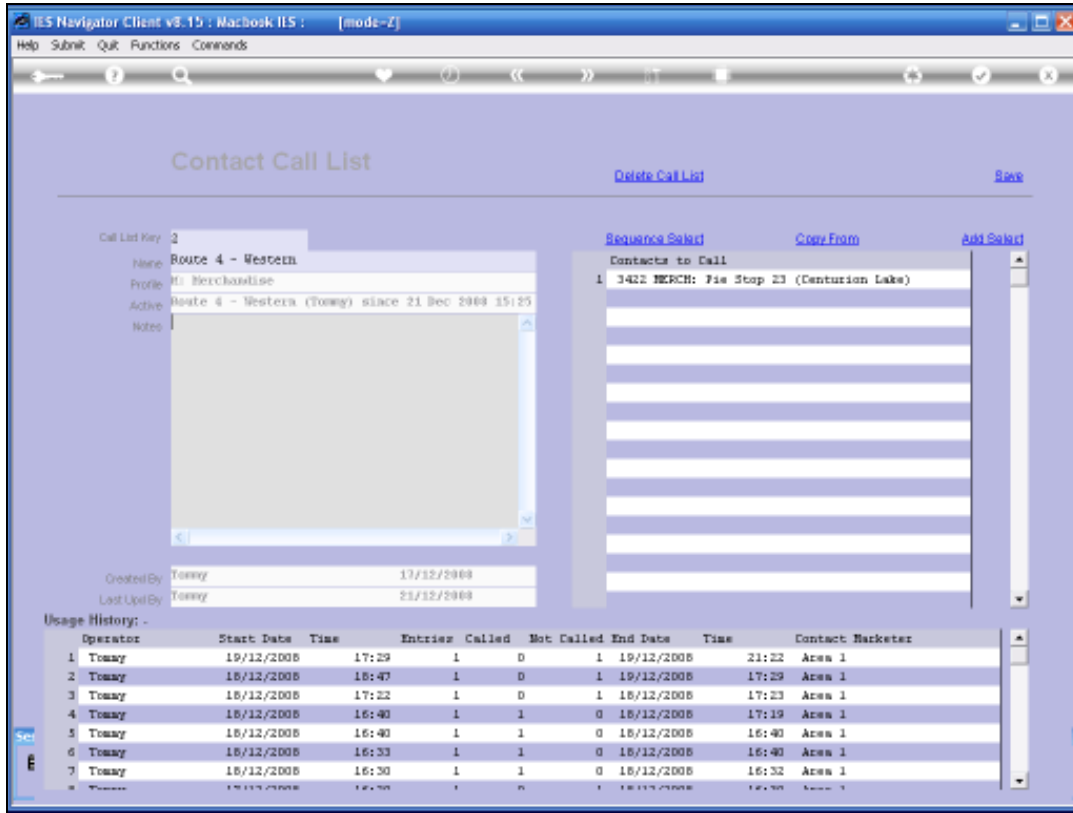
Slide 12

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



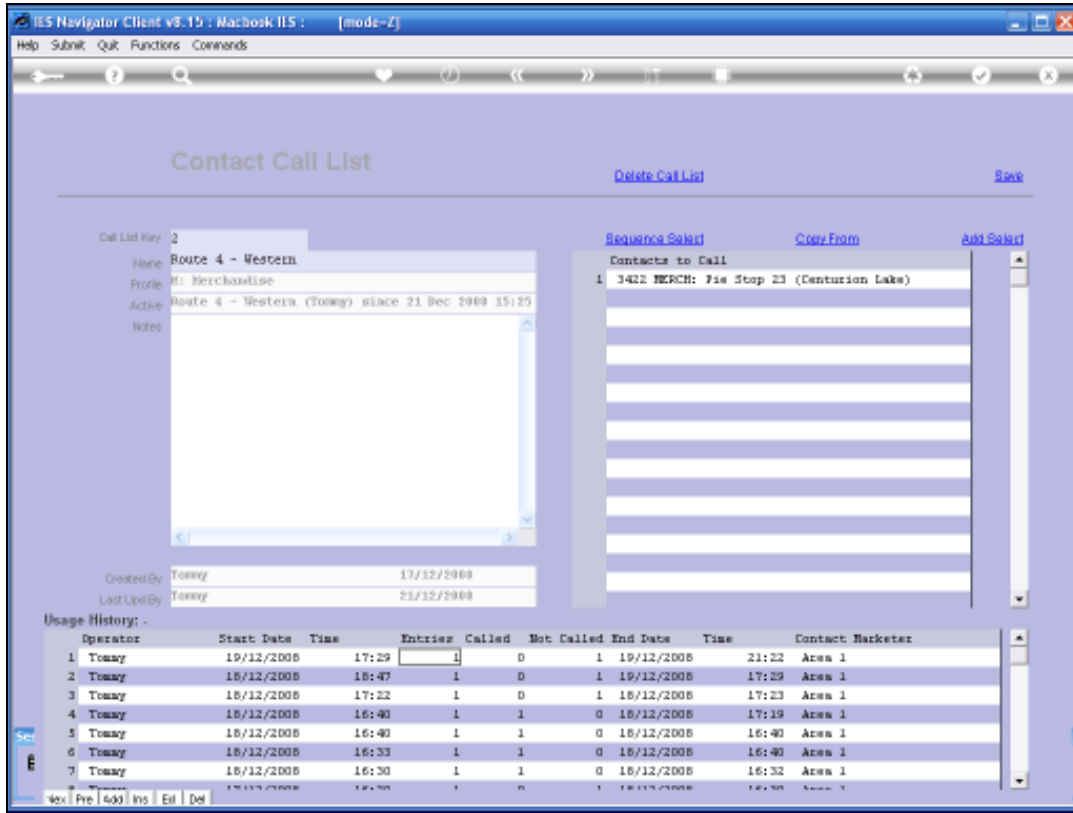
Slide 13

Slide notes:



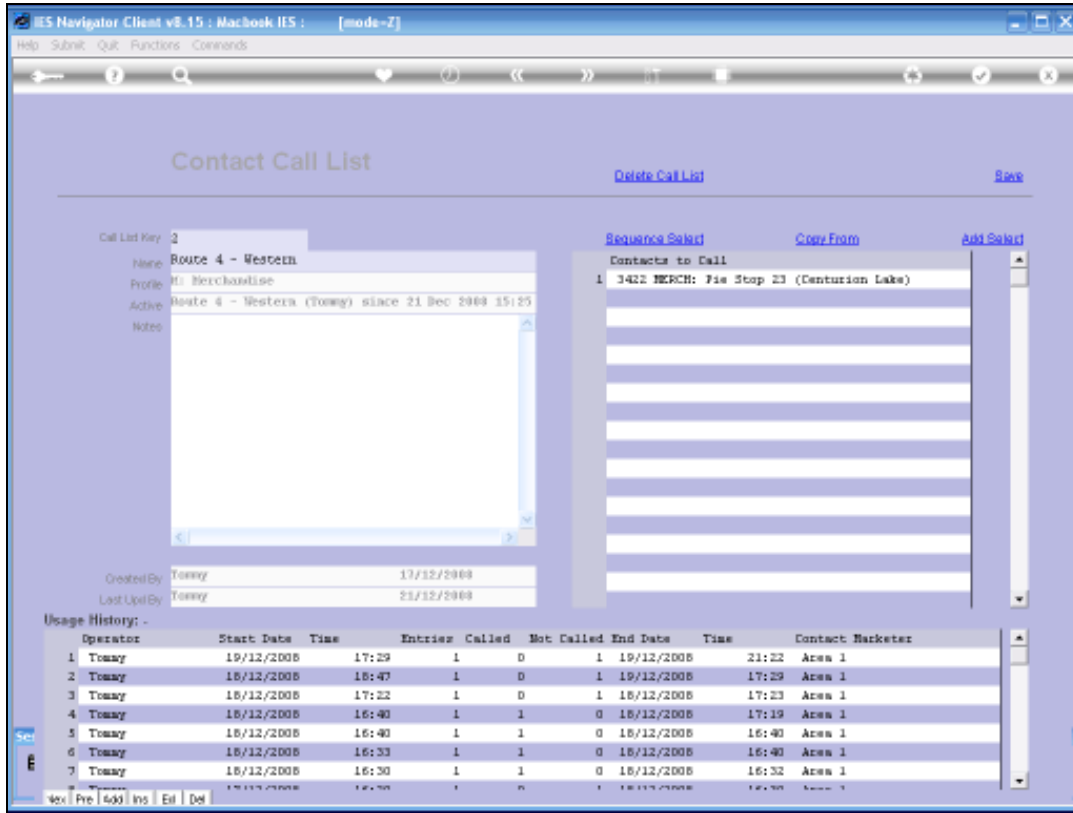
Slide 14

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



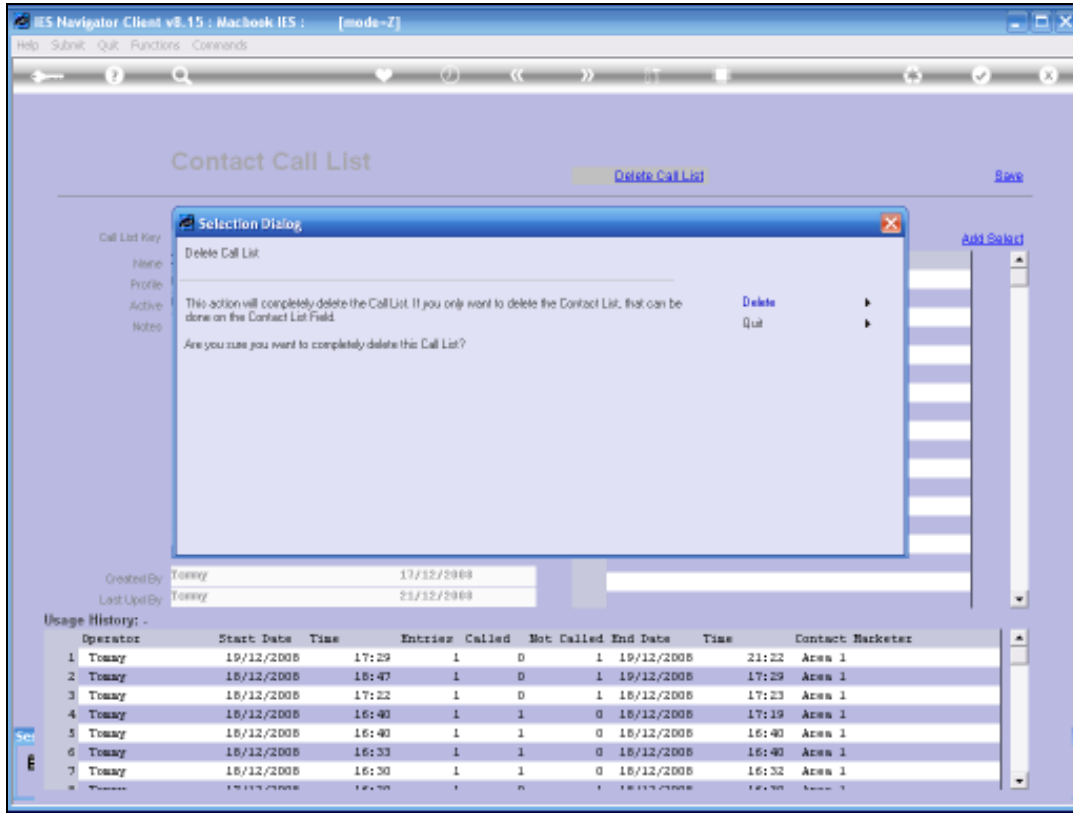
Slide 15

Slide notes:



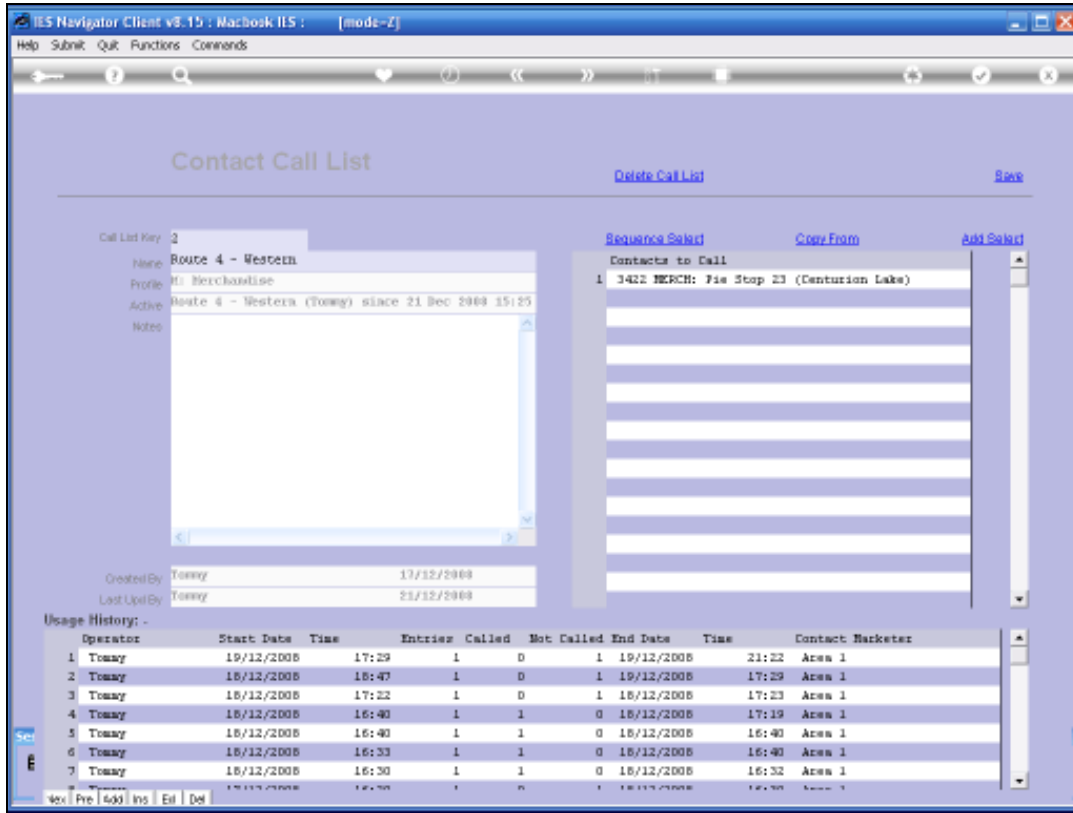
Slide 16

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



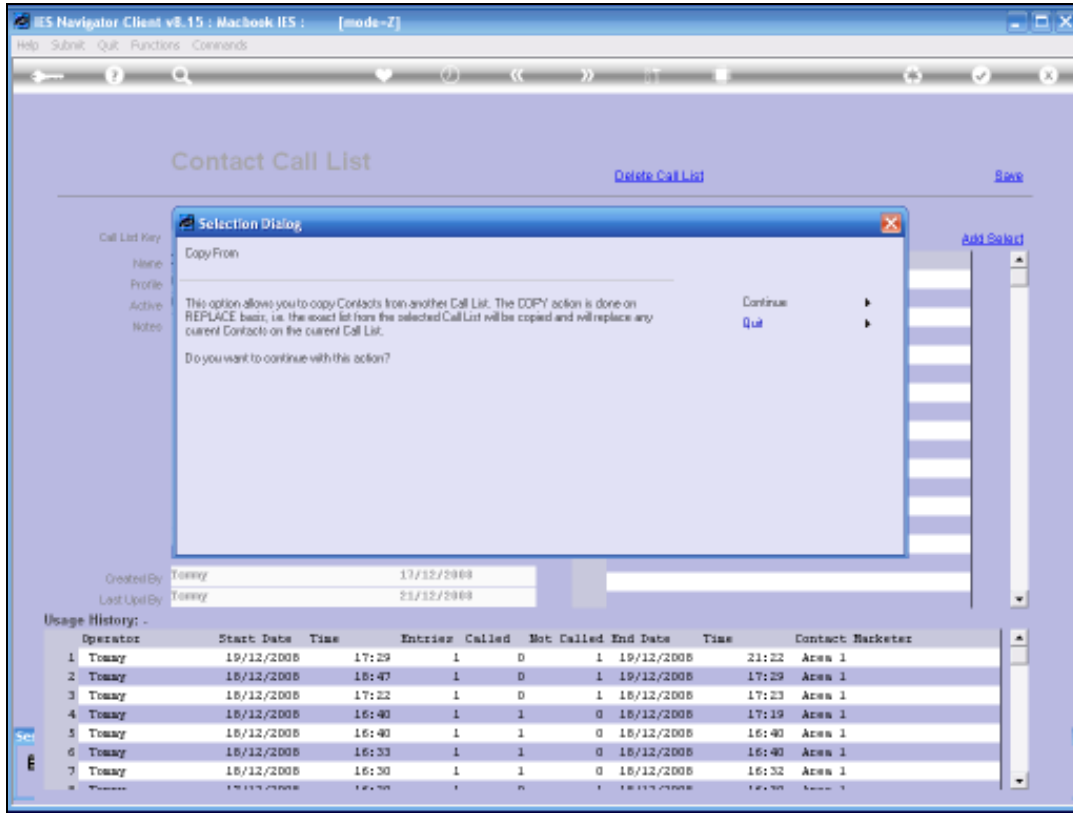
Slide 17

Slide notes:



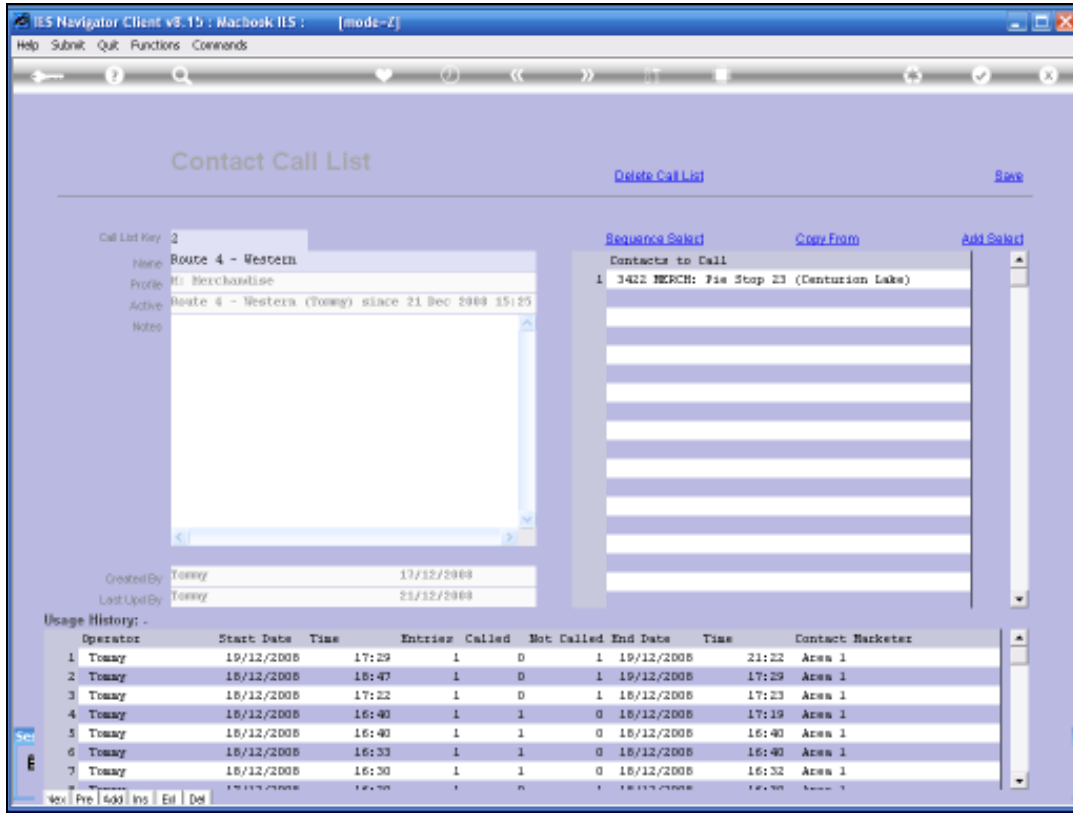
Slide 18

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



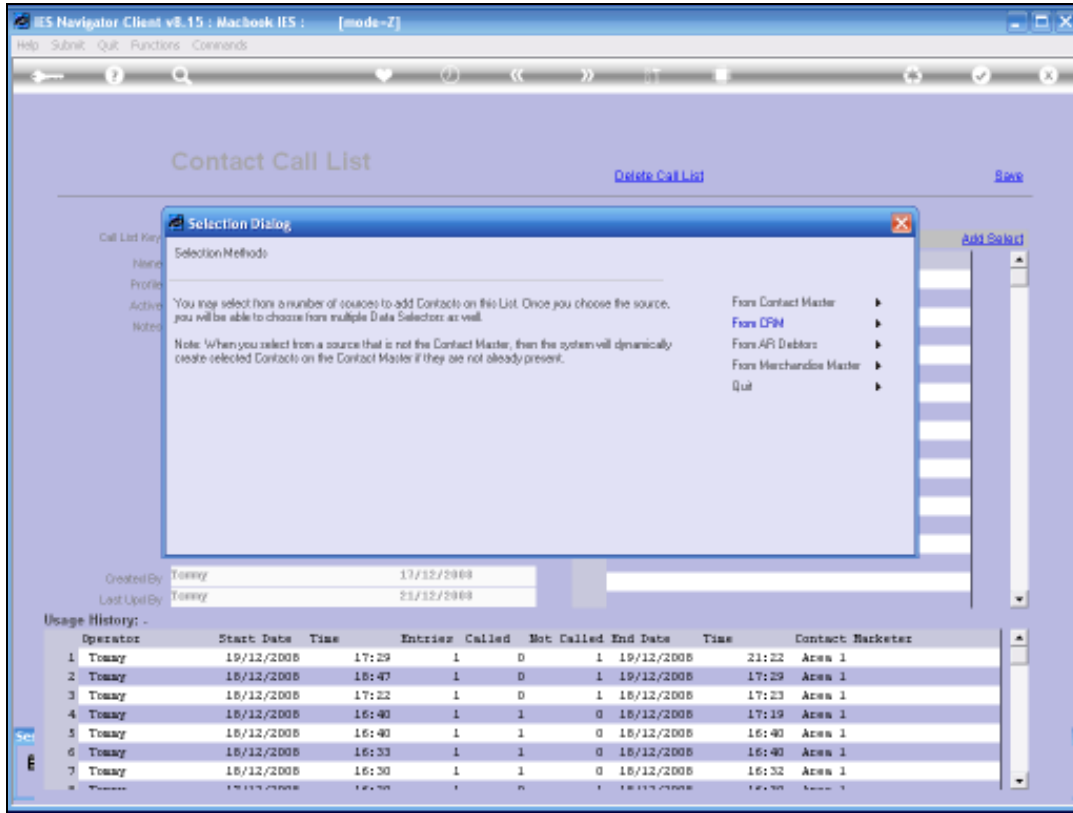
Slide 19

Slide notes:



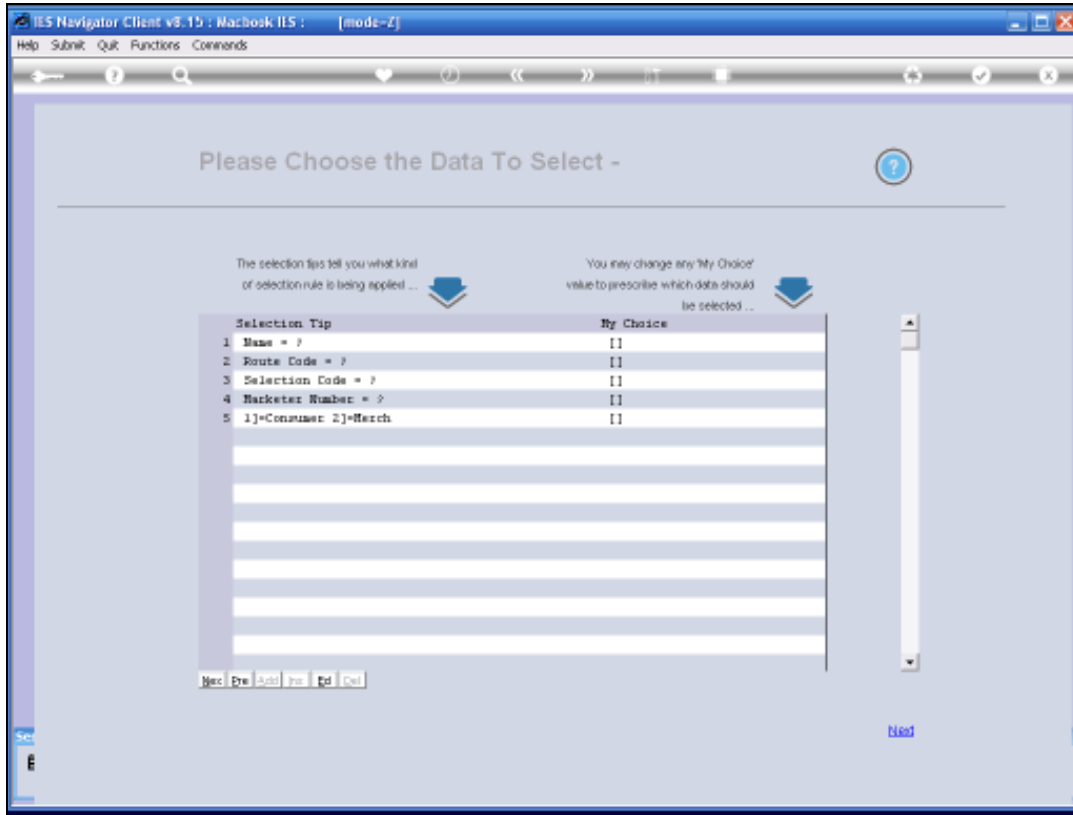
Slide 20

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

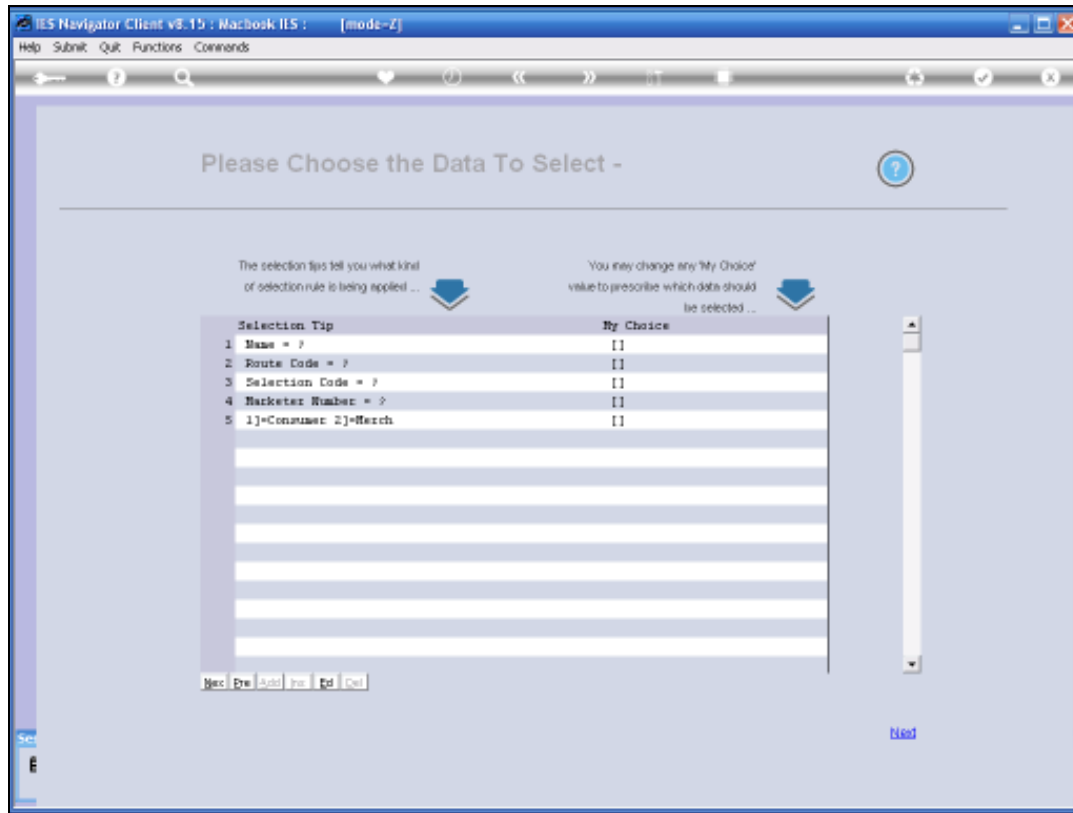


Slide 21

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.

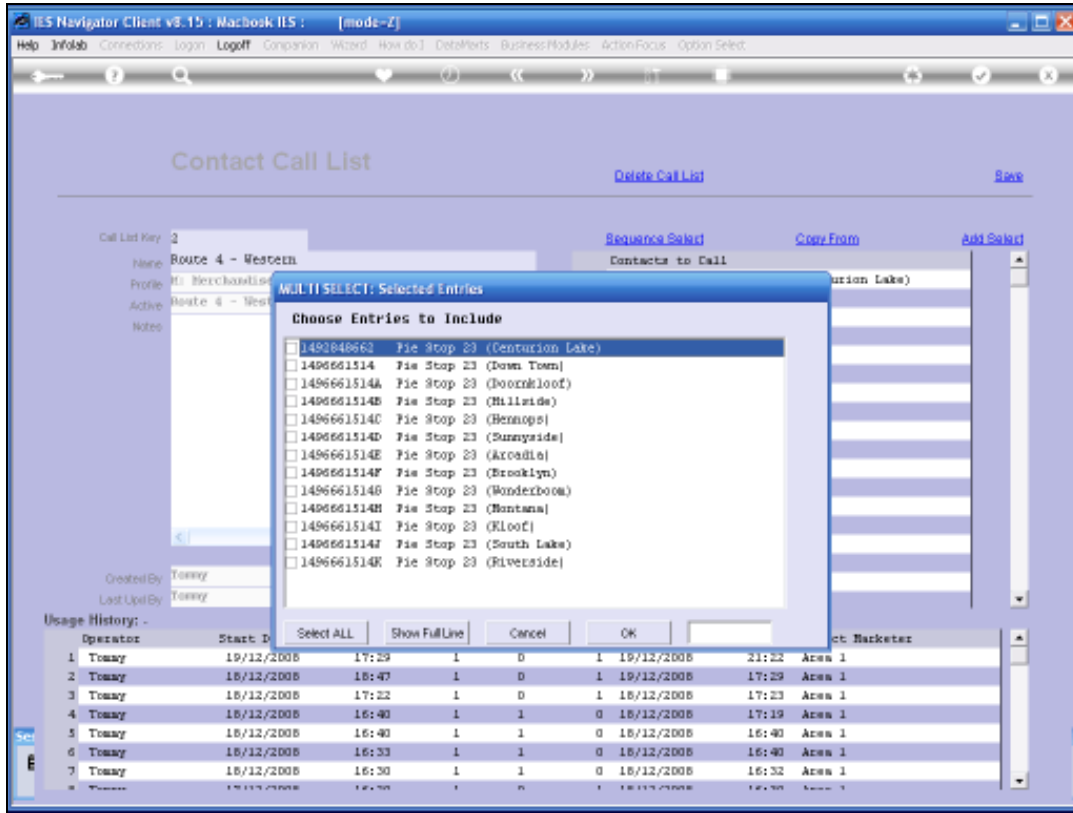


Slide 22
Slide notes:



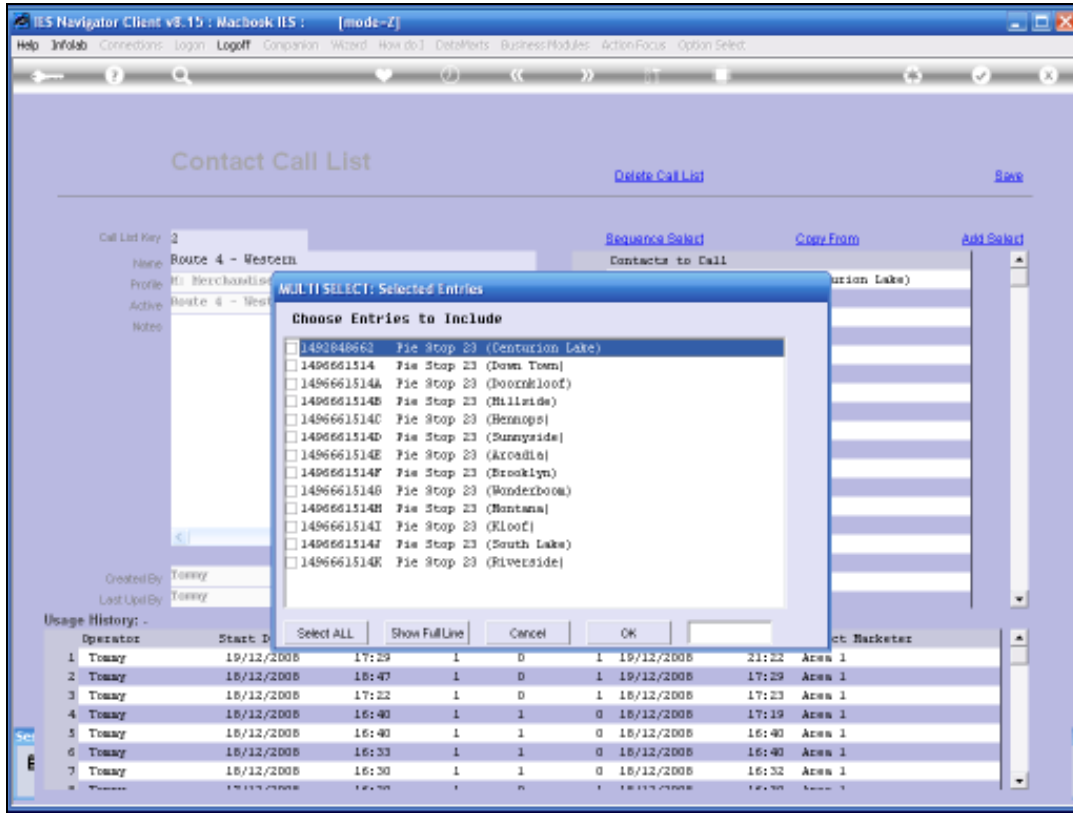
Slide 23

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



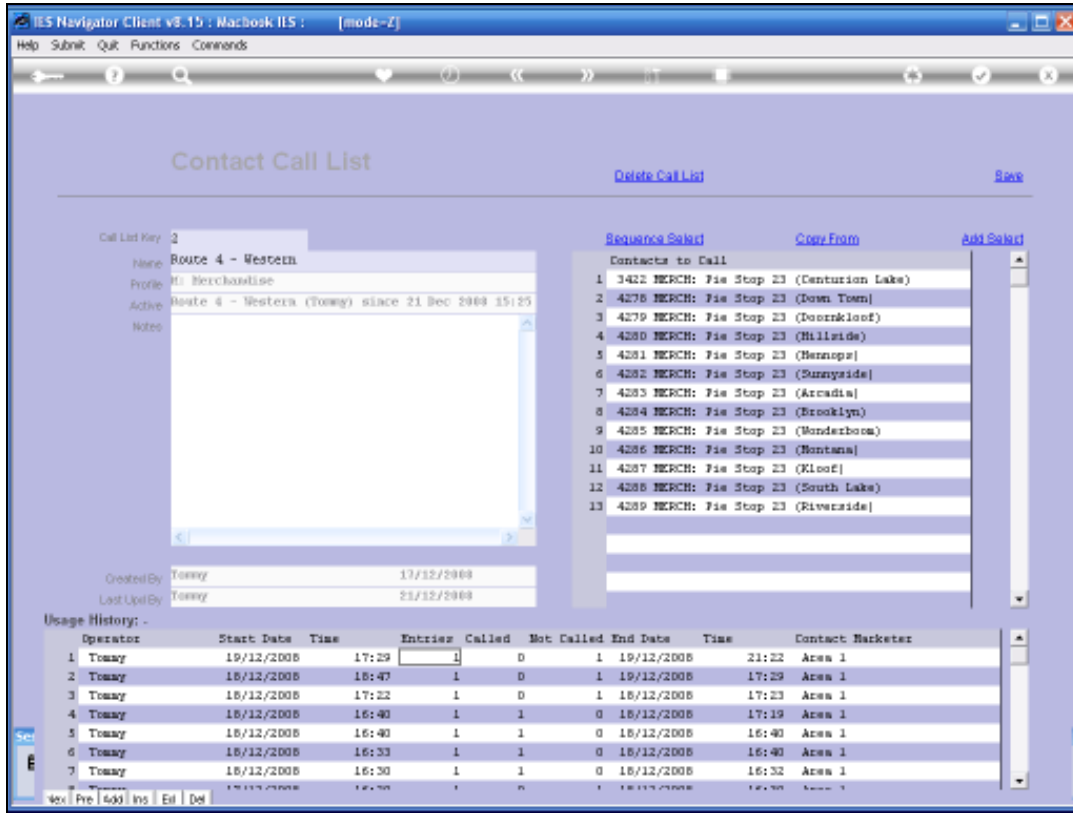
Slide 24

Slide notes:



Slide 25

Slide notes:



Slide 26

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.

Contact Call List

Call List Key: 2

Name: Route 4 - Western

Profile: M: Merchandise

Active: Route 4 - Western (Tommy) since 21 Dec 2008 15:25

Created By: Tommy 17/12/2008

Last Upd By: Tommy 23/12/2008

Usage History:

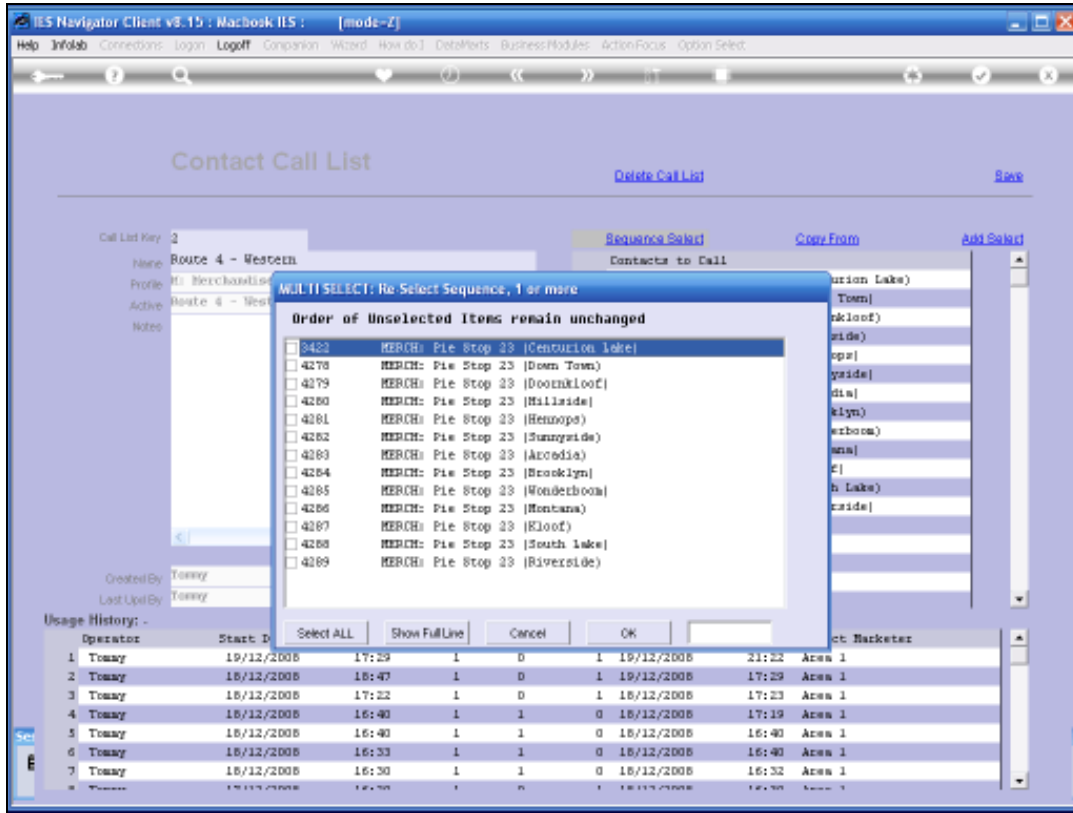
Operator	Start Date	Time	Entries Called	Not Called	End Date	Time	Contact	Marketer
1 Tommy	19/12/2008	17:29	1	0	1 19/12/2008	21:22	Area 1	
2 Tommy	18/12/2008	18:47	1	0	1 19/12/2008	17:29	Area 1	
3 Tommy	18/12/2008	17:22	1	0	1 18/12/2008	17:23	Area 1	
4 Tommy	18/12/2008	16:40	1	1	0 18/12/2008	17:19	Area 1	
5 Tommy	18/12/2008	16:40	1	1	0 18/12/2008	16:40	Area 1	
6 Tommy	18/12/2008	16:33	1	1	0 18/12/2008	16:40	Area 1	
7 Tommy	18/12/2008	16:30	1	1	0 18/12/2008	16:32	Area 1	

Contacts to Call:

Sequence	Select	Copy From	Add Select
1	3422 MERCH: Fis Stop 23 (Centurion Lake)		
2	4278 MERCH: Fis Stop 23 (Down Town)		
3	4279 MERCH: Fis Stop 23 (Doornkloof)		
4	4280 MERCH: Fis Stop 23 (Hillside)		
5	4281 MERCH: Fis Stop 23 (Hennops)		
6	4282 MERCH: Fis Stop 23 (Sunnyside)		
7	4283 MERCH: Fis Stop 23 (Arcadia)		
8	4284 MERCH: Fis Stop 23 (Brooklyn)		
9	4285 MERCH: Fis Stop 23 (Vanderbosch)		
10	4286 MERCH: Fis Stop 23 (Montana)		
11	4287 MERCH: Fis Stop 23 (Kloof)		
12	4288 MERCH: Fis Stop 23 (South Lake)		
13	4289 MERCH: Fis Stop 23 (Riverside)		

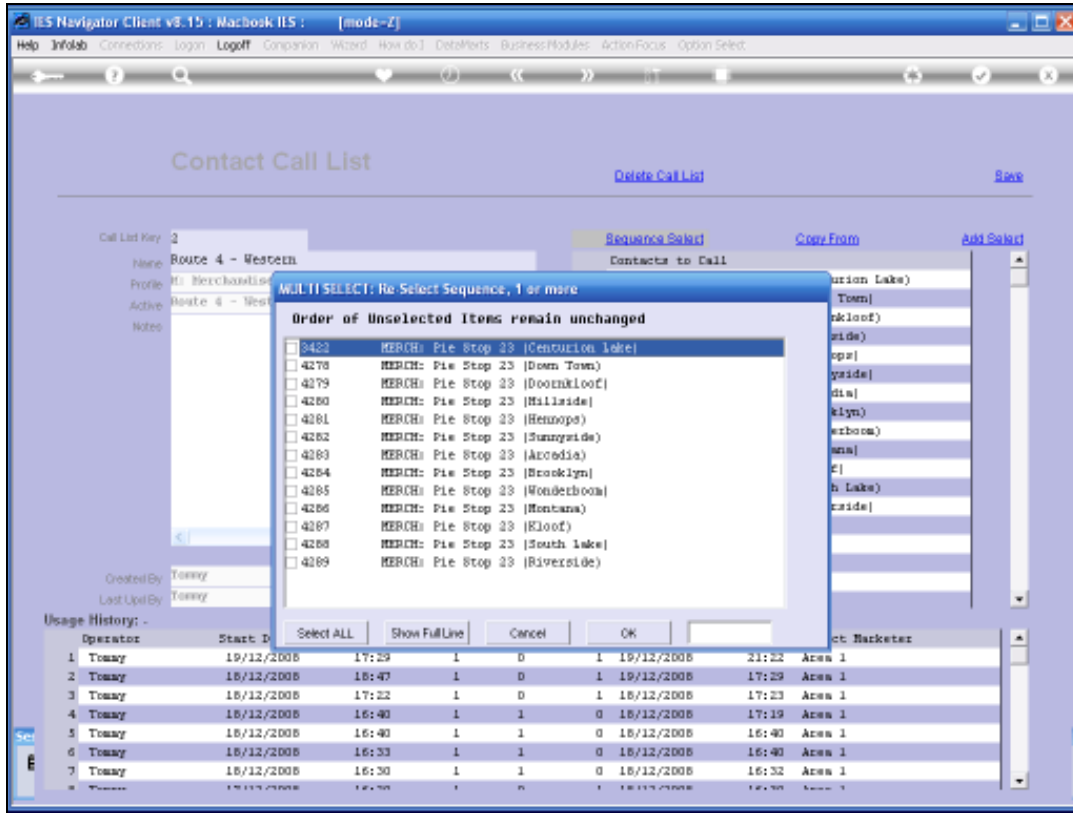
Slide 27

Slide notes:



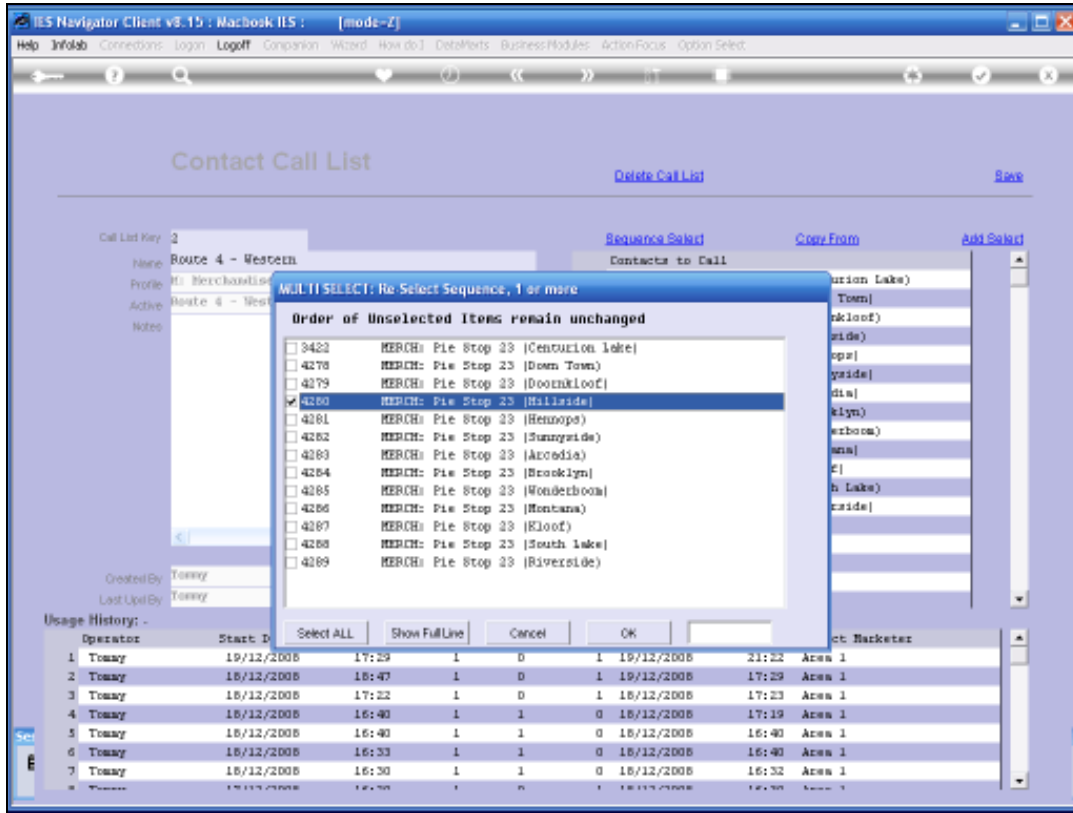
Slide 28

Slide notes:



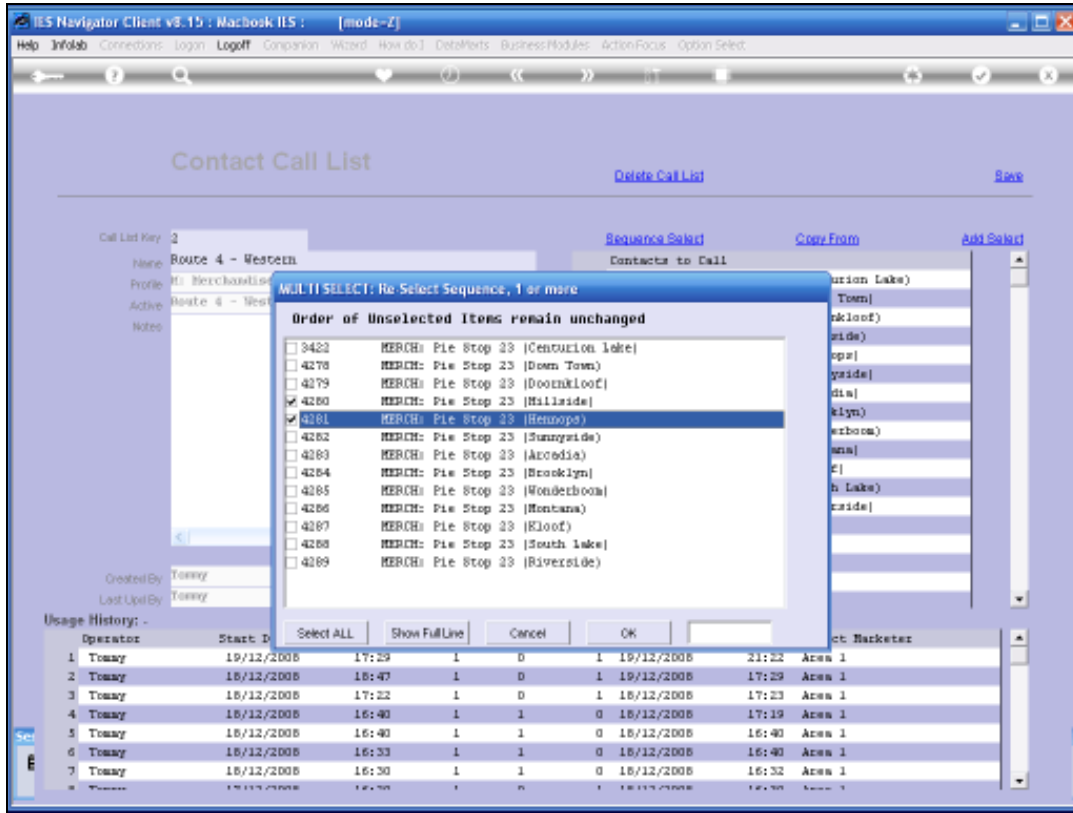
Slide 29

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.

Contact Call List

Call List Key: 2

Name: Route 4 - Western

Profile: M: Merchandise

Active: Route 4 - Western (Tommy) since 21 Dec 2008 15:25

Notes:

Created By: Tommy 17/12/2008

Last Upd By: Tommy 23/12/2008

Usage History:

Operator	Start Date	Time	Entries	Called	Not Called	End Date	Time	Contact	Marketer
1 Tommy	19/12/2008	17:29	1	0	1	19/12/2008	21:22	Area 1	
2 Tommy	18/12/2008	18:47	1	0	1	19/12/2008	17:29	Area 1	
3 Tommy	18/12/2008	17:22	1	0	1	18/12/2008	17:23	Area 1	
4 Tommy	18/12/2008	16:40	1	1	0	18/12/2008	17:19	Area 1	
5 Tommy	18/12/2008	16:40	1	1	0	18/12/2008	16:40	Area 1	
6 Tommy	18/12/2008	16:33	1	1	0	18/12/2008	16:40	Area 1	
7 Tommy	18/12/2008	16:30	1	1	0	18/12/2008	16:32	Area 1	

Contacts to Call:

- 4280 MERCH: Fis Stop 23 (Hillside)
- 4281 MERCH: Fis Stop 23 (Hennepin)
- 3422 MERCH: Fis Stop 23 (Centurion Lake)
- 4278 MERCH: Fis Stop 23 (Down Town)
- 4279 MERCH: Fis Stop 23 (Doornkloof)
- 4282 MERCH: Fis Stop 23 (Sunnyside)
- 4283 MERCH: Fis Stop 23 (Arcadia)
- 4284 MERCH: Fis Stop 23 (Brooklyn)
- 4285 MERCH: Fis Stop 23 (Wanderboro)
- 4286 MERCH: Fis Stop 23 (Montana)
- 4287 MERCH: Fis Stop 23 (Kloof)
- 4288 MERCH: Fis Stop 23 (South Lake)
- 4289 MERCH: Fis Stop 23 (Riverside)

Slide 32

Slide notes:

Contact Call List

Call List Key: 2

Name: Route 4 - Western

Profile: M: Merchandise

Active: Route 4 - Western (Tommy) since 21 Dec 2008 15:25

Created By: Tommy 17/12/2008

Last Used By: Tommy 23/12/2008

Usage History:

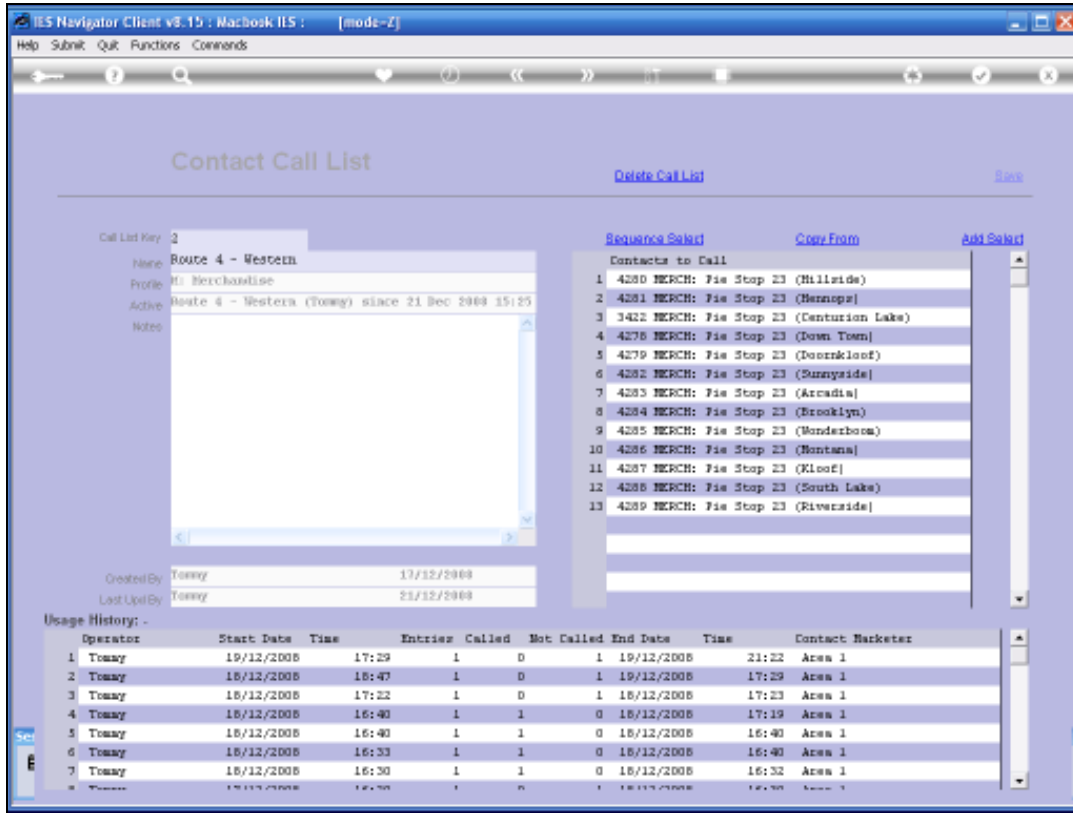
Operator	Start Date	Time	Entries	Called	Not Called	End Date	Time	Contact	Marketer
1 Tommy	19/12/2008	17:29	1	0	1	19/12/2008	21:22	Area 1	
2 Tommy	18/12/2008	18:47	1	0	1	19/12/2008	17:29	Area 1	
3 Tommy	18/12/2008	17:22	1	0	1	18/12/2008	17:23	Area 1	
4 Tommy	18/12/2008	16:40	1	1	0	18/12/2008	17:19	Area 1	
5 Tommy	18/12/2008	16:40	1	1	0	18/12/2008	16:40	Area 1	
6 Tommy	18/12/2008	16:33	1	1	0	18/12/2008	16:40	Area 1	
7 Tommy	18/12/2008	16:30	1	1	0	18/12/2008	16:32	Area 1	

Contacts to Call:

- 4280 MERCH: Fis Stop 23 (Hillside)
- 4281 MERCH: Fis Stop 23 (Hennepin)
- 3422 MERCH: Fis Stop 23 (Centurion Lake)
- 4278 MERCH: Fis Stop 23 (Down Town)
- 4279 MERCH: Fis Stop 23 (Doornkloof)
- 4282 MERCH: Fis Stop 23 (Sunnyside)
- 4283 MERCH: Fis Stop 23 (Arcadia)
- 4284 MERCH: Fis Stop 23 (Brooklyn)
- 4285 MERCH: Fis Stop 23 (Wanderboro)
- 4286 MERCH: Fis Stop 23 (Montana)
- 4287 MERCH: Fis Stop 23 (Kloof)
- 4288 MERCH: Fis Stop 23 (South Lake)
- 4289 MERCH: Fis Stop 23 (Riverside)

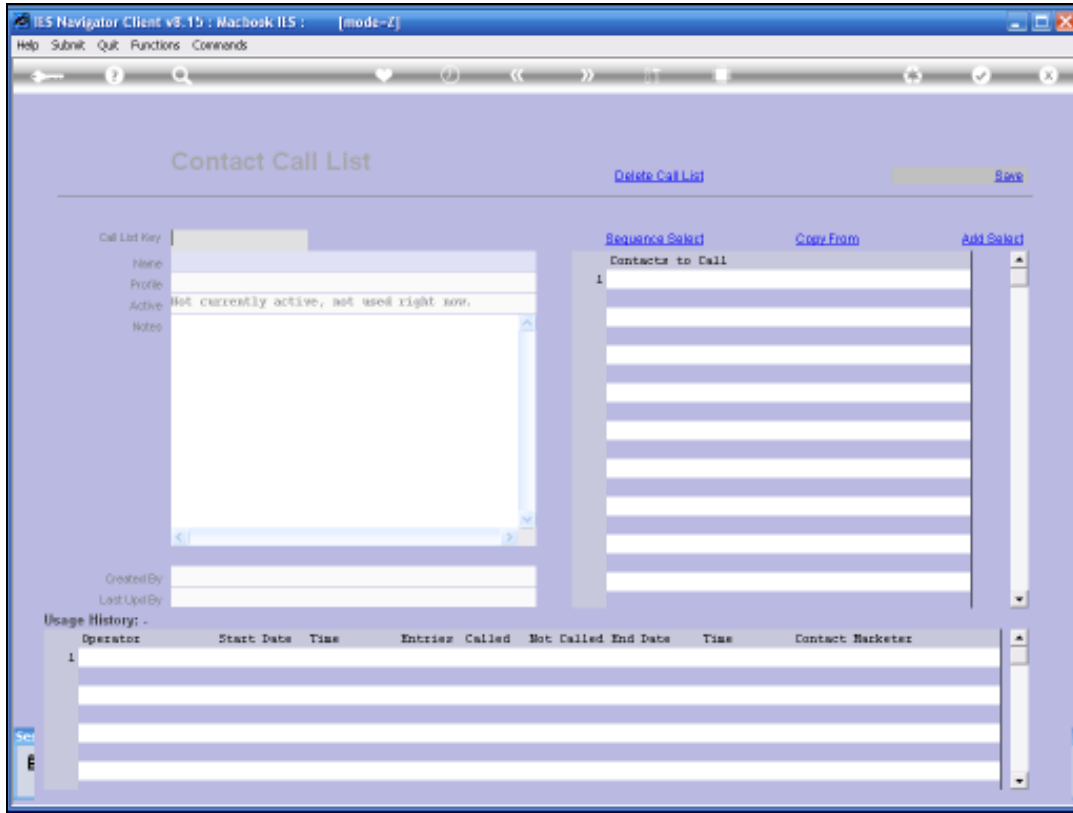
Slide 33

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: