Slide 1

Slide notes: In this tutorial we discuss the operating SETTINGS for Contact Marketing.
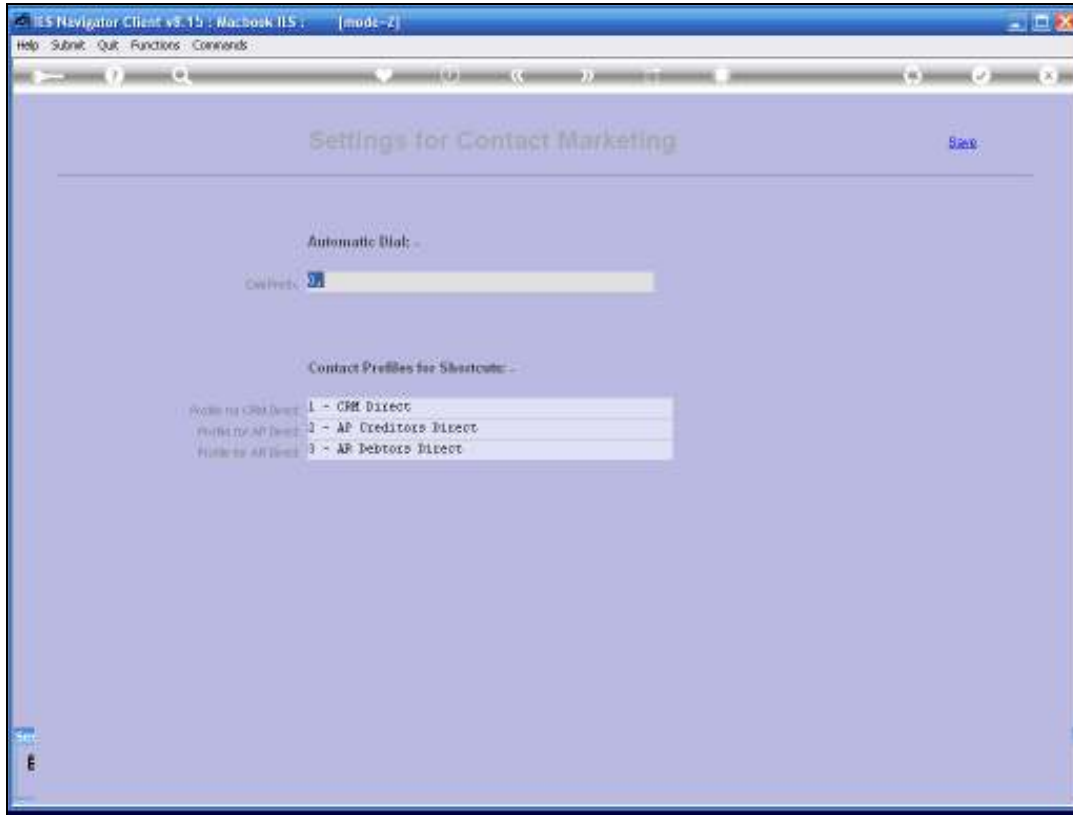
Slide 2
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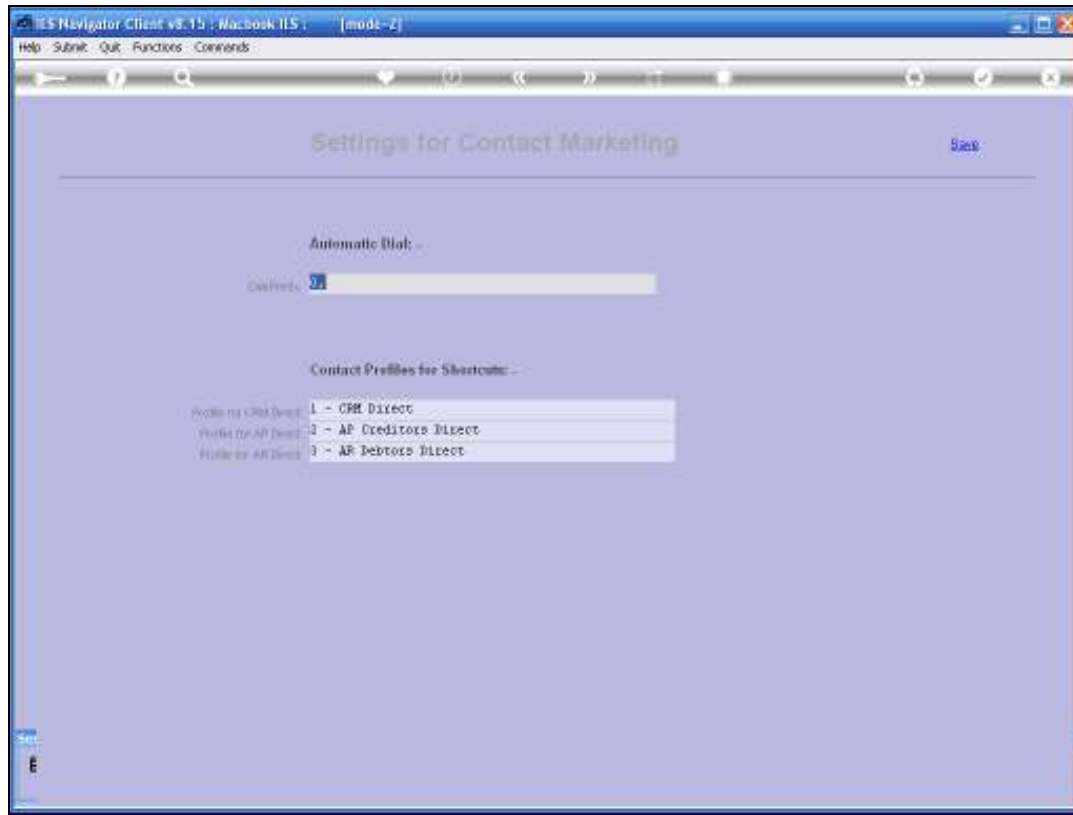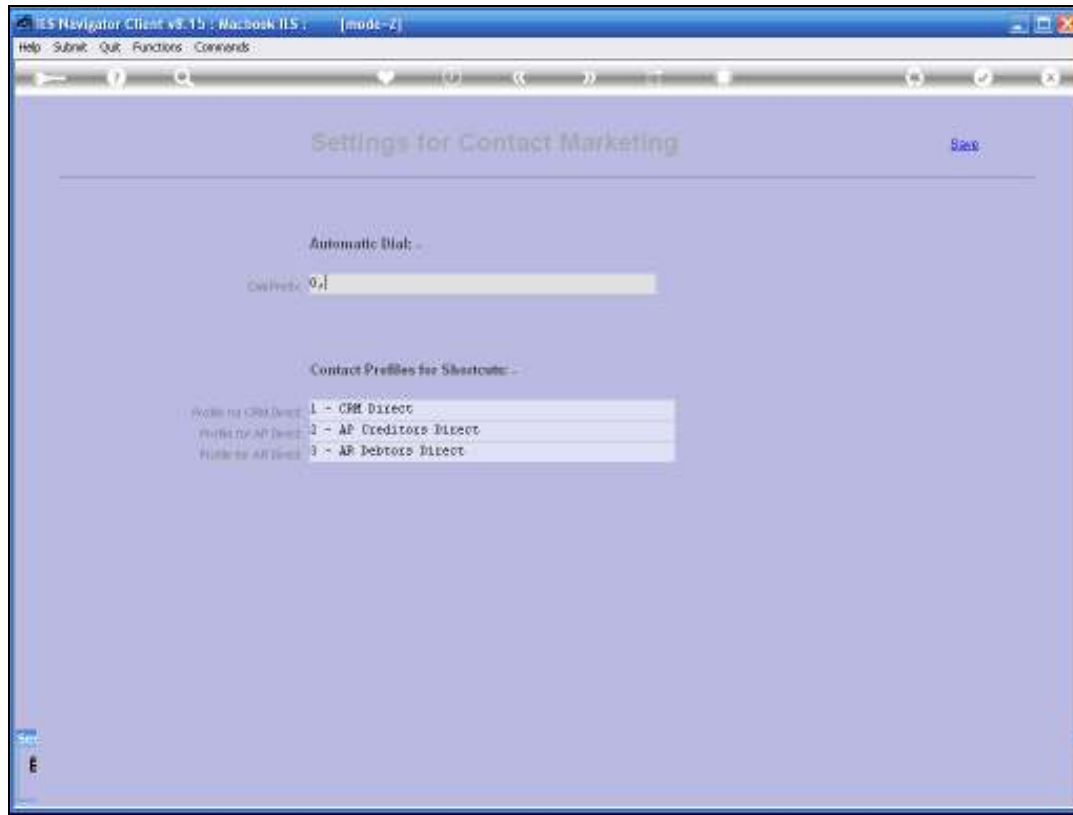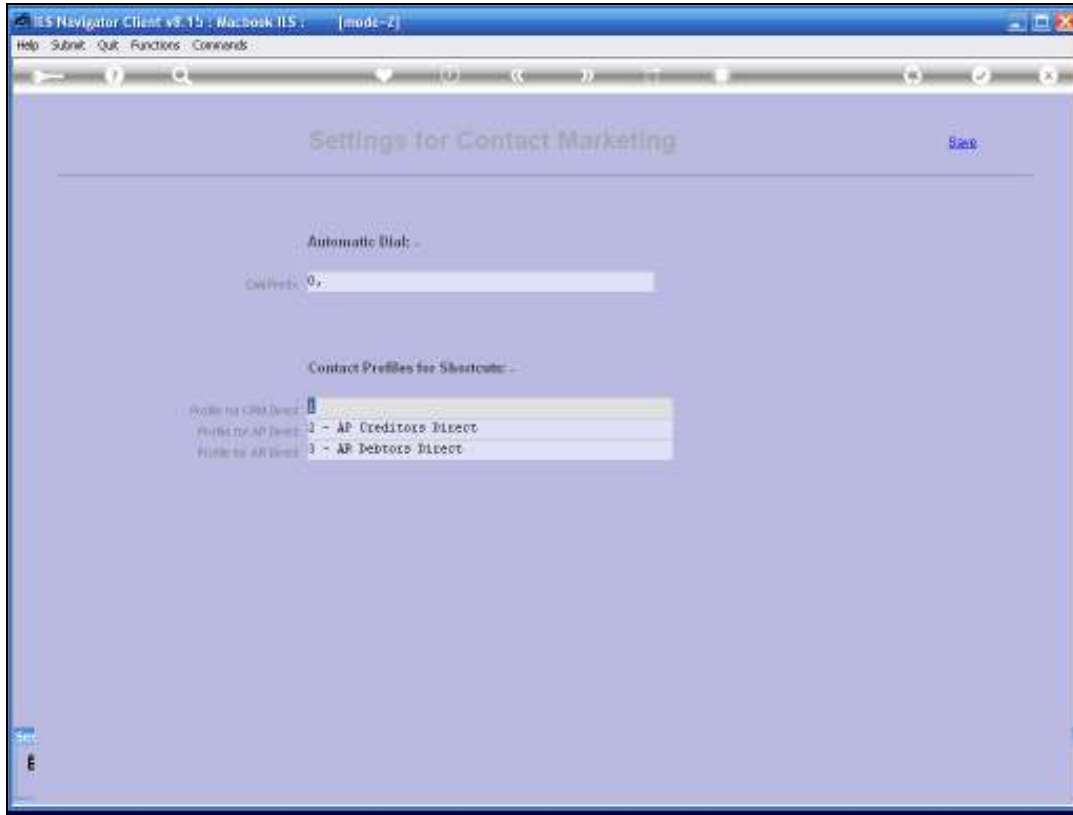
Slide 3

Slide notes: The 1st item of interest is the dial prefix. This is not essential to indicate, but we use it if there is a prefix on the internal switchboard to get a line. In this case, the prefix will automatically be added to the Contact telephone number when the system dials the Contact.
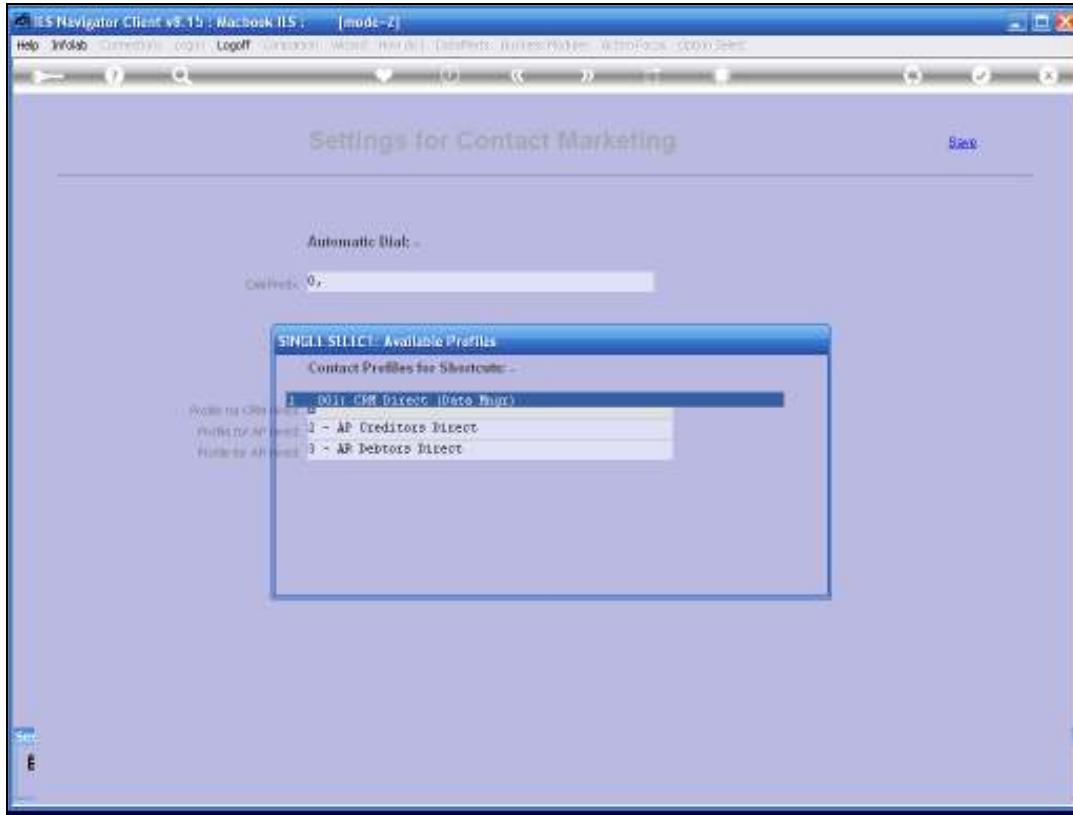
Slide 4

Slide notes: We also need to indicate a Marketing Profile to be used for each of CRM, AP Creditors and AR Debtors when those Accounts are contacted directly, without going through the Contact Marketing dashboard.
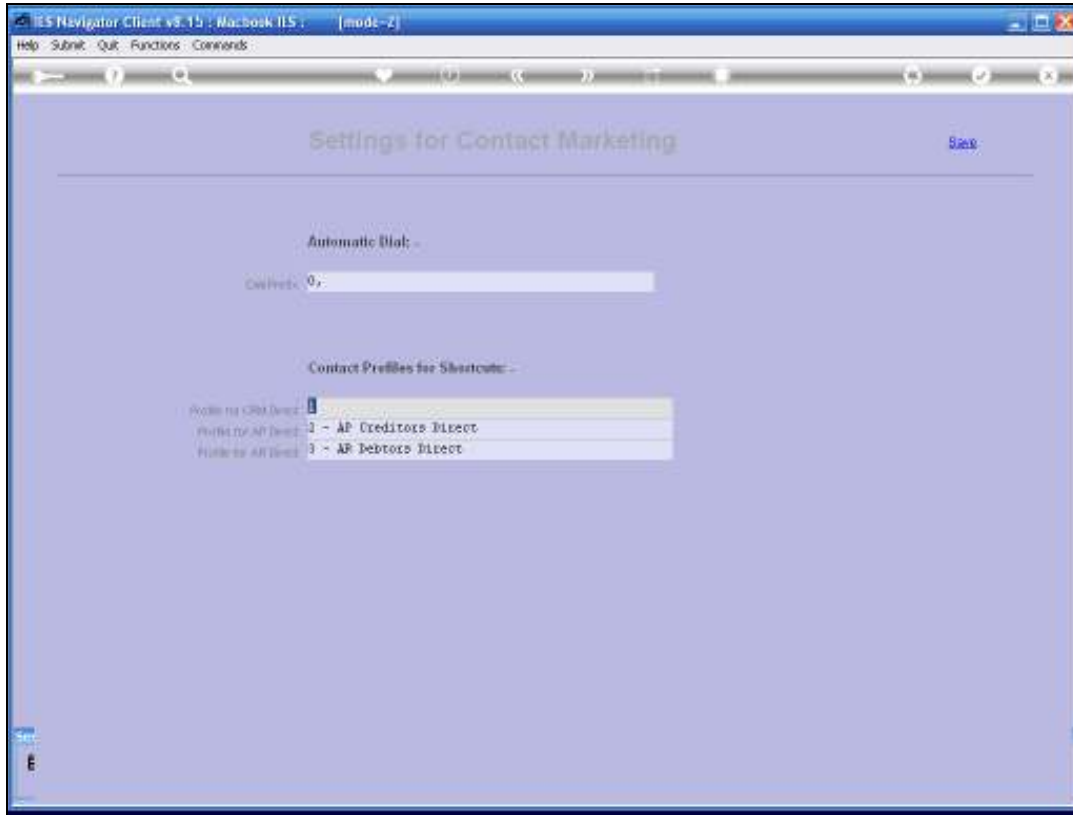
Slide 5
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Slide 8

Slide notes: Note on this list of Contact Marketing Profiles, that we have such entries in addition to our usual Contact Marketing Profiles, and when we use separate profiles for Direct Contacting, then the statistics do not interfere with our other Marketing campaigns.
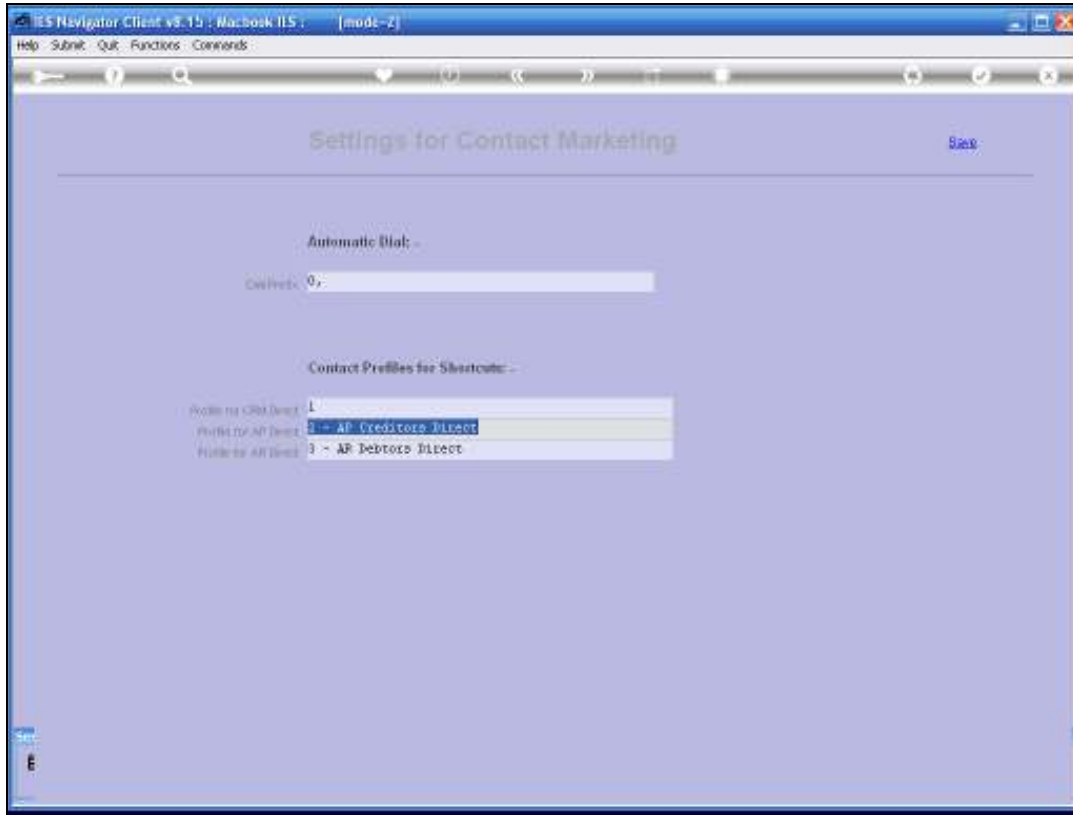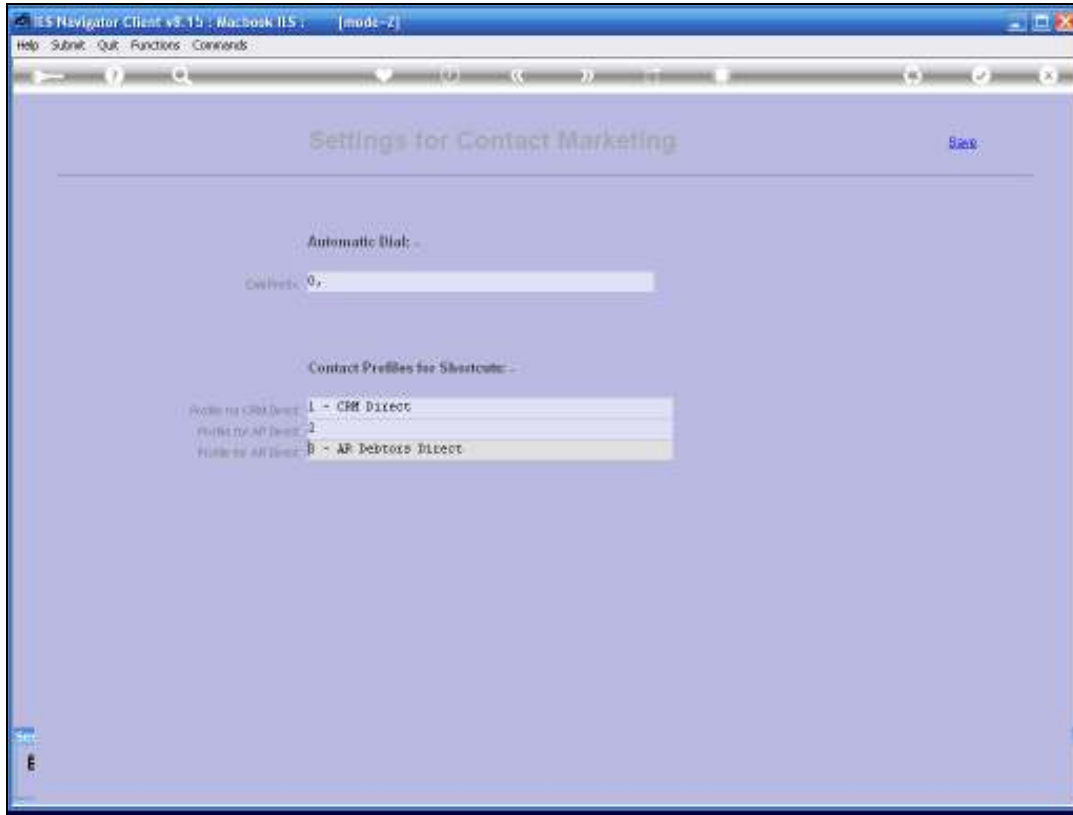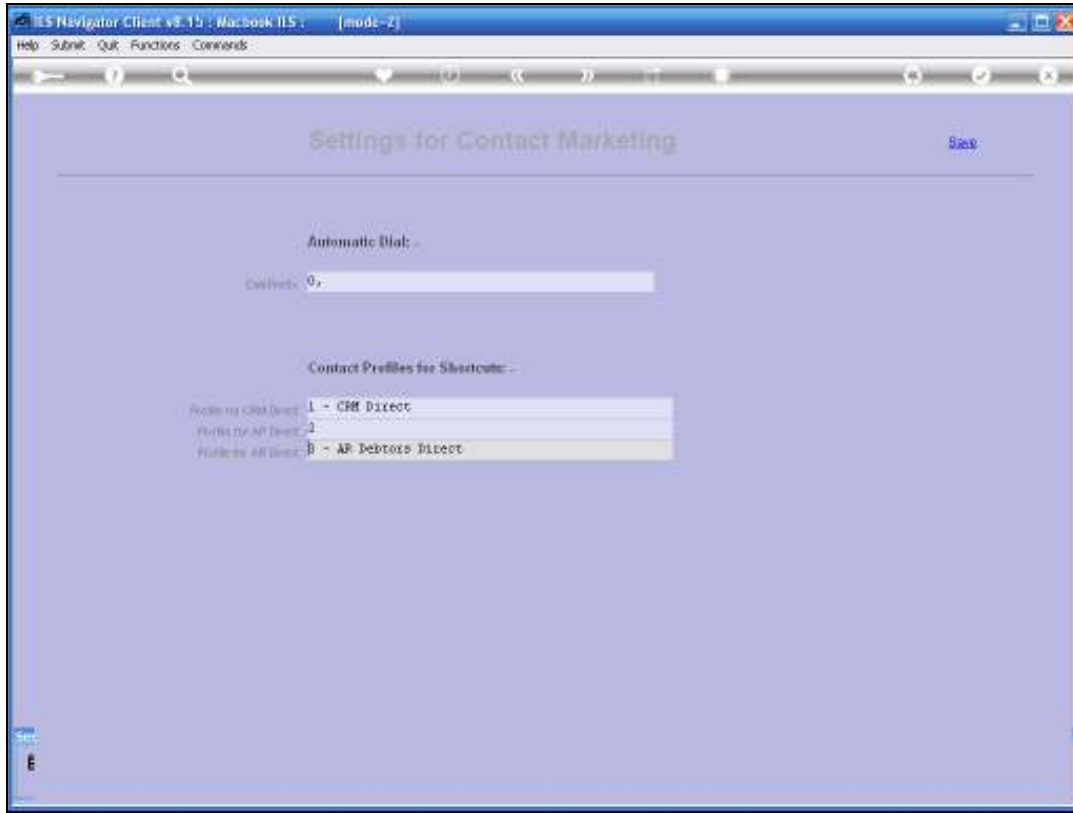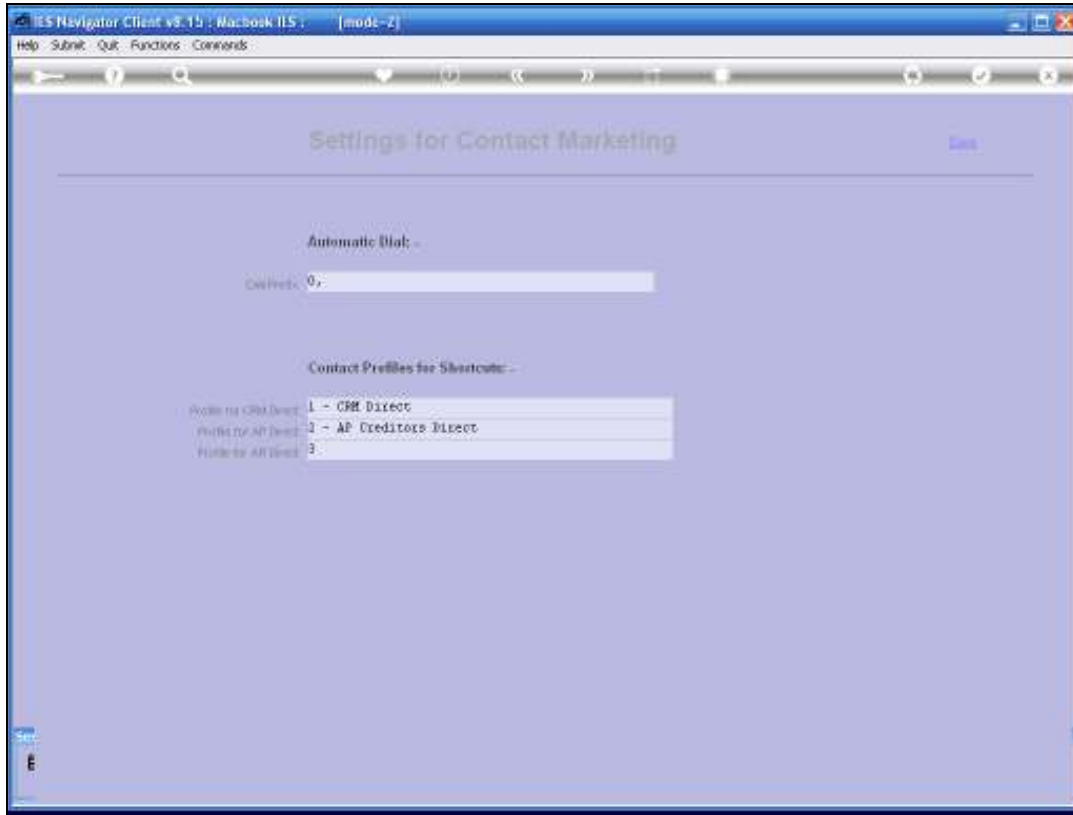
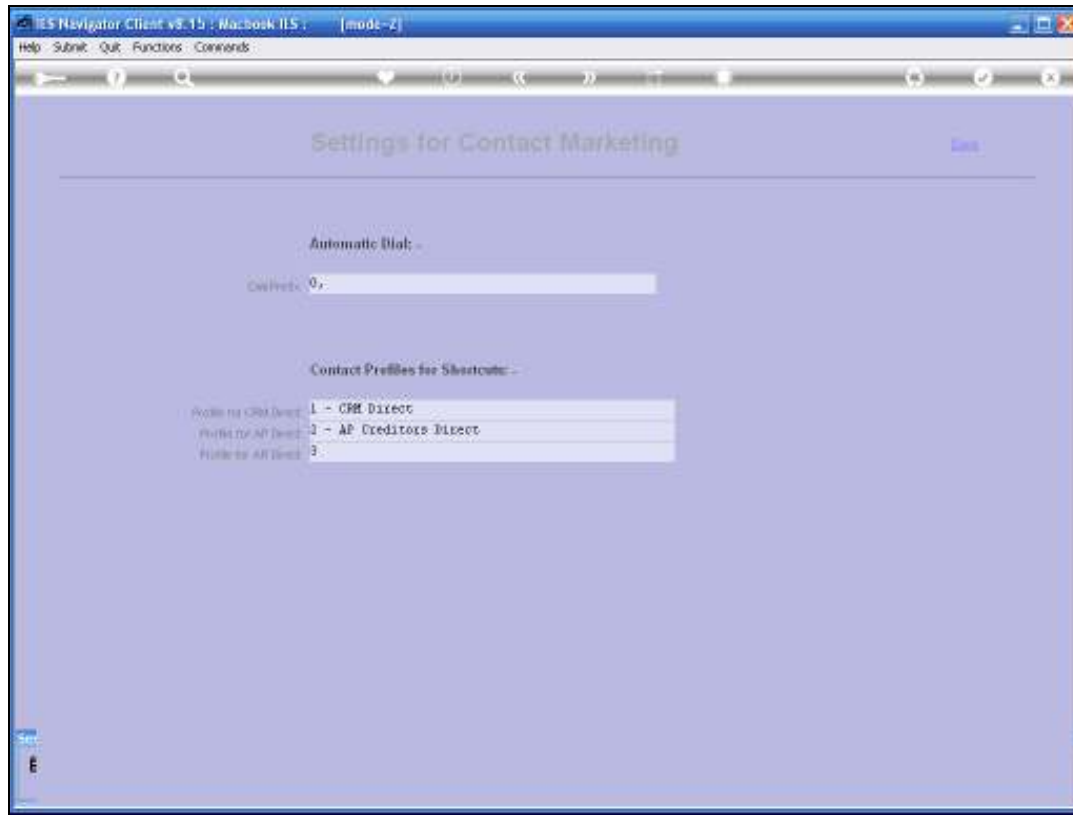Slide 9
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Slide 14

Slide notes: When our settings are defined, we SAVE it, and of course it can be amended at any time if necessary.

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Slide notes:

Slide 16
Slide notes: