

Slide 1

Slide notes: In this tutorial we are explaining the options for 'On Demand Contact Call'. This option is available on the Contact Dashboard, and operates independently of any Call List. In other words, we select a Contact, and then we can call the Contact or simply perform some follow up work on the Call Contact record, whether that be Order follow up, Commentary, or other.

The screenshot shows the IIS Navigator Client interface for 'Macbook IIS'. The main window title is 'IIS Navigator Client v8.15 : Macbook IIS : [mode-2]'. The browser address bar shows 'http://localhost:8080/...'. The page content is titled 'Contact Marketing' and includes a 'Contact Dashboard' section.

**MY: -**

	Calls	Orders	Sales
Today	0	0	0.00
Yesterday	0	0	0.00
This Week	0	0	0.00
Last Week	0	0	0.00
This Month	0	0	0.00
Last Month	0	0	0.00

**ALL: -**

	Calls	Orders	Sales
Today	0	0	0.00
Yesterday	1	0	0.00
This Week	1	0	0.00
Last Week	2136	1880	267,560.00
This Month	4849	4294	603,280.00
Last Month	5640	2940	460,000.00

**Contact Dashboard**

Current Node: 004 - Route 3 - Estore - (Tower)

Call List: [input field] [Change](#)

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

Active Call List Indicators -

List Description when activated

Total Orders

Ready Count

Total Revenue

**Reports**

- Call Lists
- General

**File Maintenance**

- General Contact Master
- Maintain Contact Master
- Contact Masters
- New Call List
- Call List Master
- Settings

**Administration and Control**

- Done
- Tasks: Submit New
- Tasks: Perform
- Tasks: Edit
- Tasks: List/Active
- Tasks: Check Progress
- Local

Slide 2

Slide notes:

The screenshot displays a web application window titled "IIS Navigator Client v8.15 : Macbook IIS : [mode-2]". The window contains a navigation menu with "1 Main", "2 Address", and "3 Other" tabs. Below the menu is a "Customer Profile (Corporate)" section with a "Contact Manage" link. The form includes several input fields: "Customer Code" (77), "Company Name" (Azed & Wilson), "Primary Contact" (Paul), "Tax Number", "Service Hours", "Telephone" (012 555 3232), "Fax Number", "E-Mail", "Website", and "Contact" (Paul). At the bottom, it shows "Record Last Updated: 19/11/2009" and "Last Updated By: T00000".

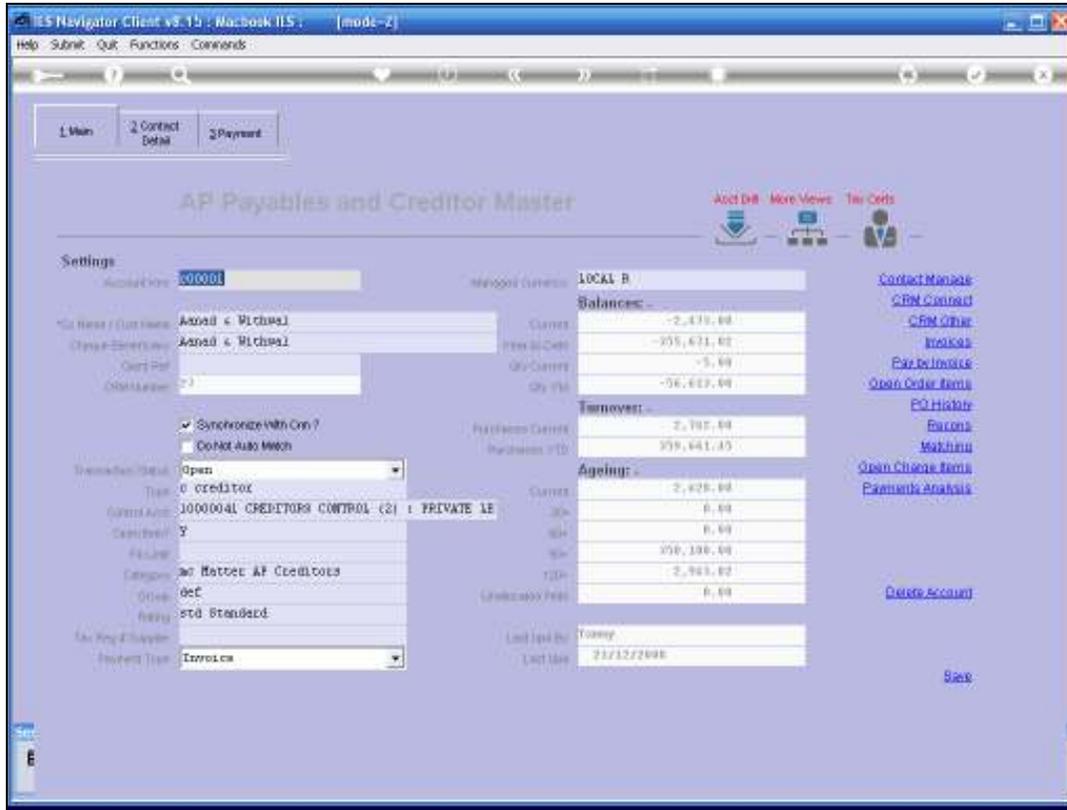
### Slide 3

Slide notes: The DIRECT or ON DEMAND option is actually also available at CRM, AP Creditors and AR Debtors. Here we see a CRM Master Record, and if we select CONTACT MANAGE, that leads to an 'on demand' call scenario.

The screenshot shows a software window titled "IIS Navigator Client v8.15 : Macbook IIS : [mode-2]". The window contains a menu bar with "Help", "Submit", "Quit", "Functions", and "Commands". Below the menu is a navigation bar with three tabs: "1 Main", "2 Address", and "3 Other". The main content area is titled "Customer Profile (Corporate)" and includes a "Contact Manage" button. The form contains several input fields: "Customer Code" with the value "77", "Company Name" with "Azed & Wilson", "Primary Contact" with "Paul", "Tax Number", "Service Name", "Telephone" with "012 555 3232", "Fax Number", "E-Mail", "Website", and "Contact" with "Paul". At the bottom, there are fields for "Record Last Updated" (19/11/2008) and "Last Updated By" (TOMOR).

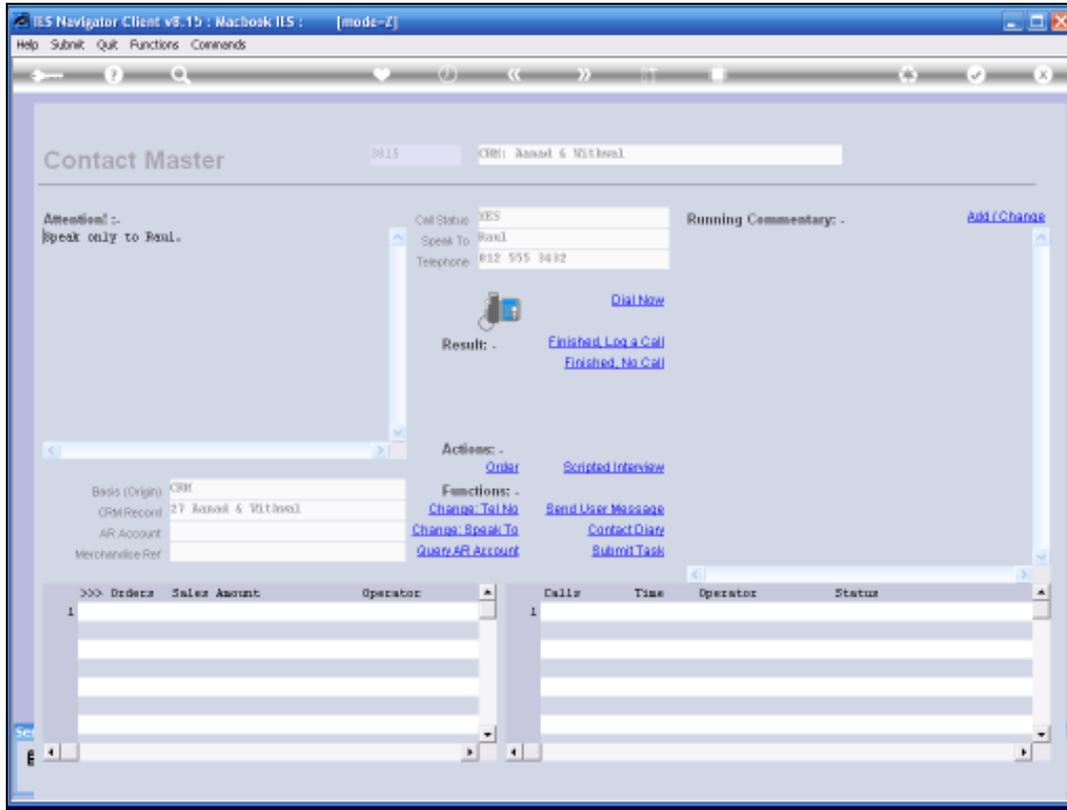
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Slide notes:



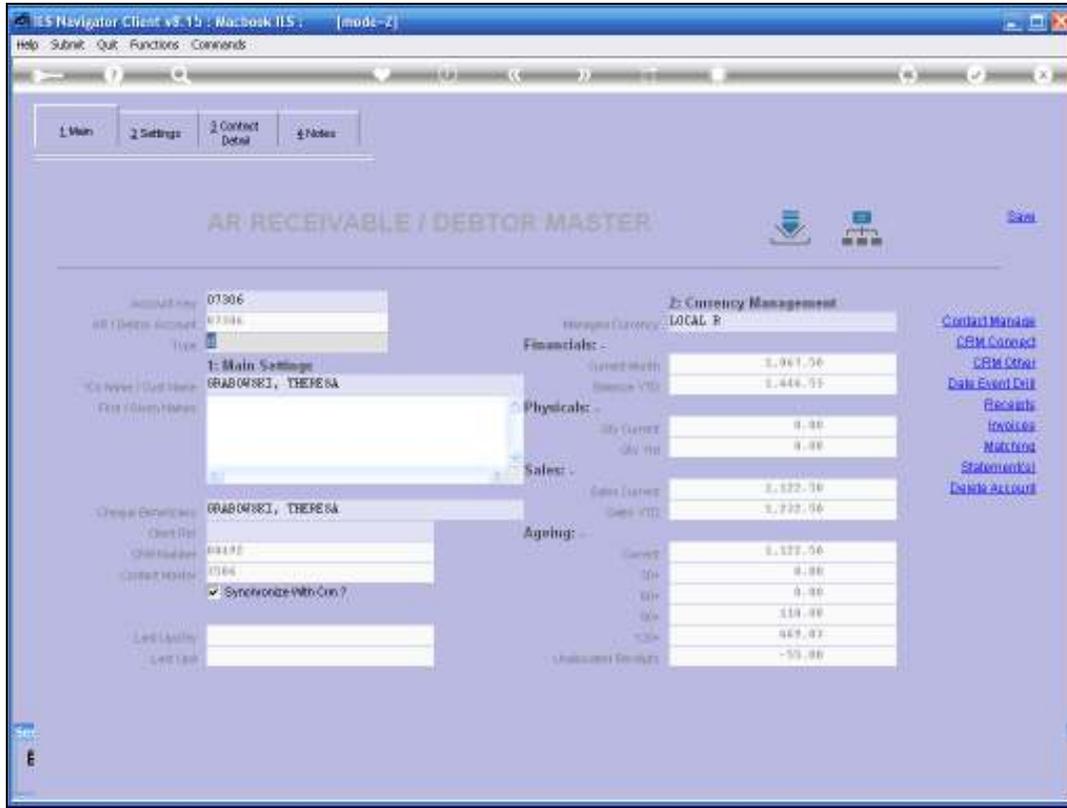
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Slide notes: Next, we consider an AP Creditor Master screen. Here we can also select CONTACT MANAGE and link directly to an 'on demand' Contact Call screen. Even if there is no Contact Master entry yet for this Account, the system will generate it automatically.



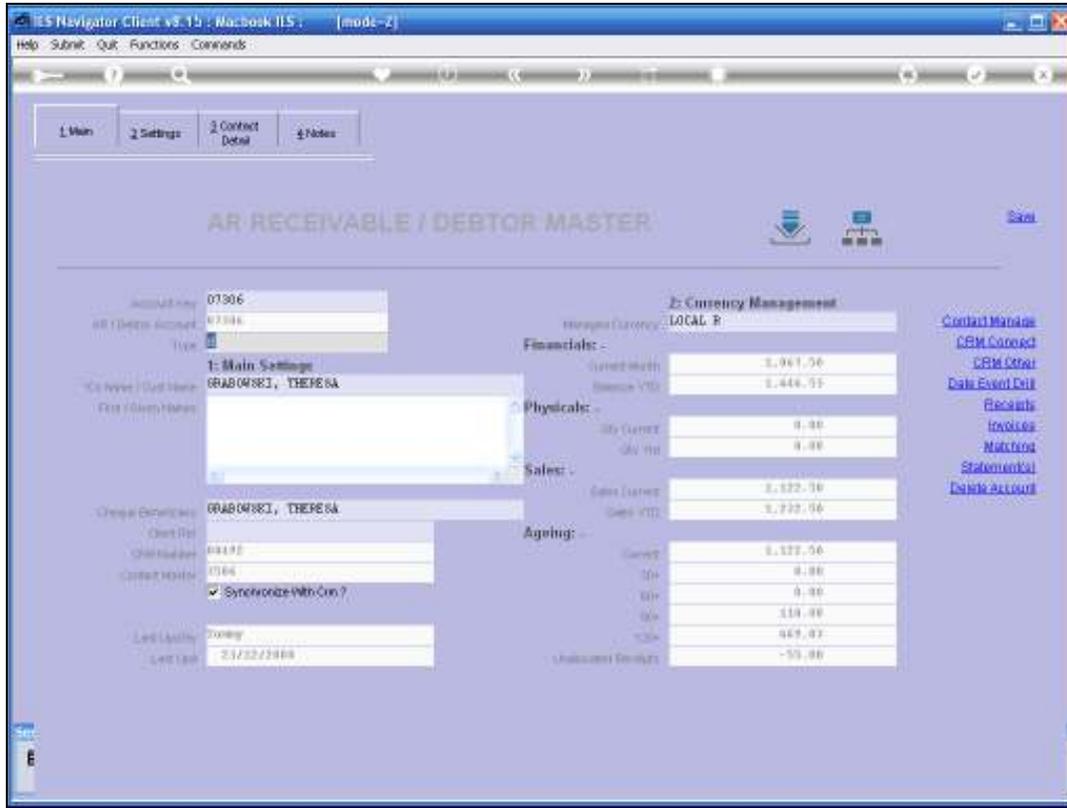
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Slide notes: So this means that we can Contact Manage any AP Creditor Account on demand.



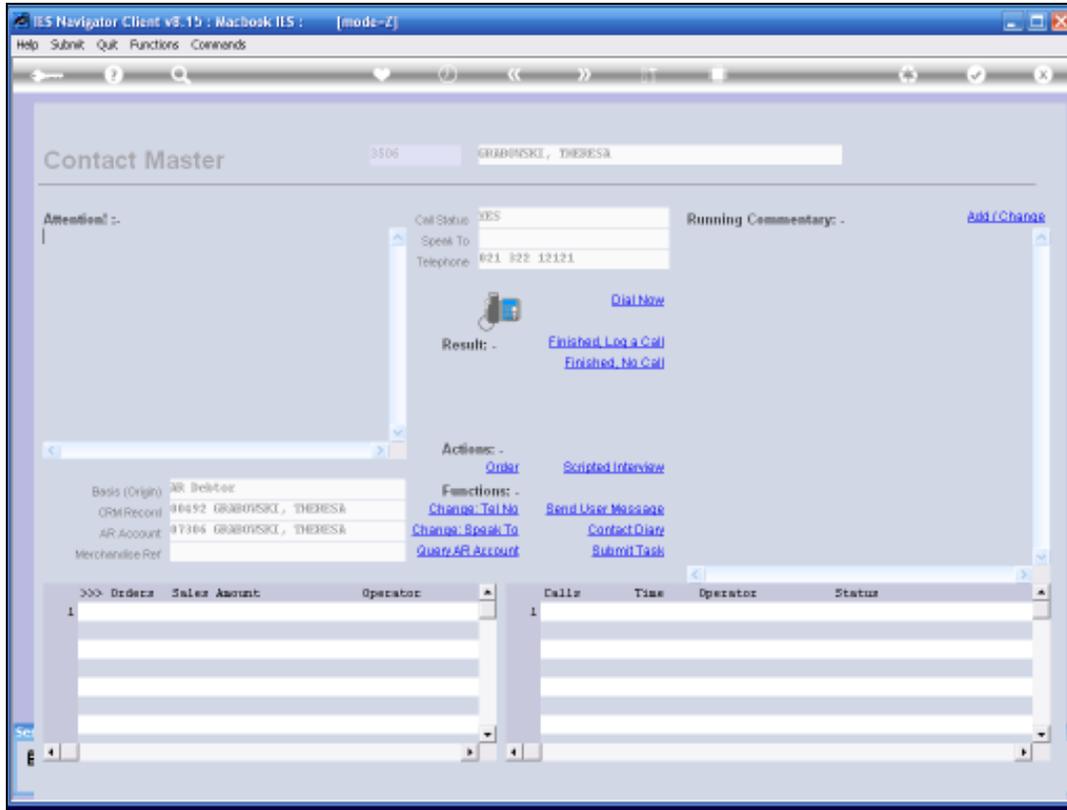
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Slide notes: For AR Debtors it is quite the same. Just choose CONTACT MANAGE and immediately we enter a Call Contact screen.



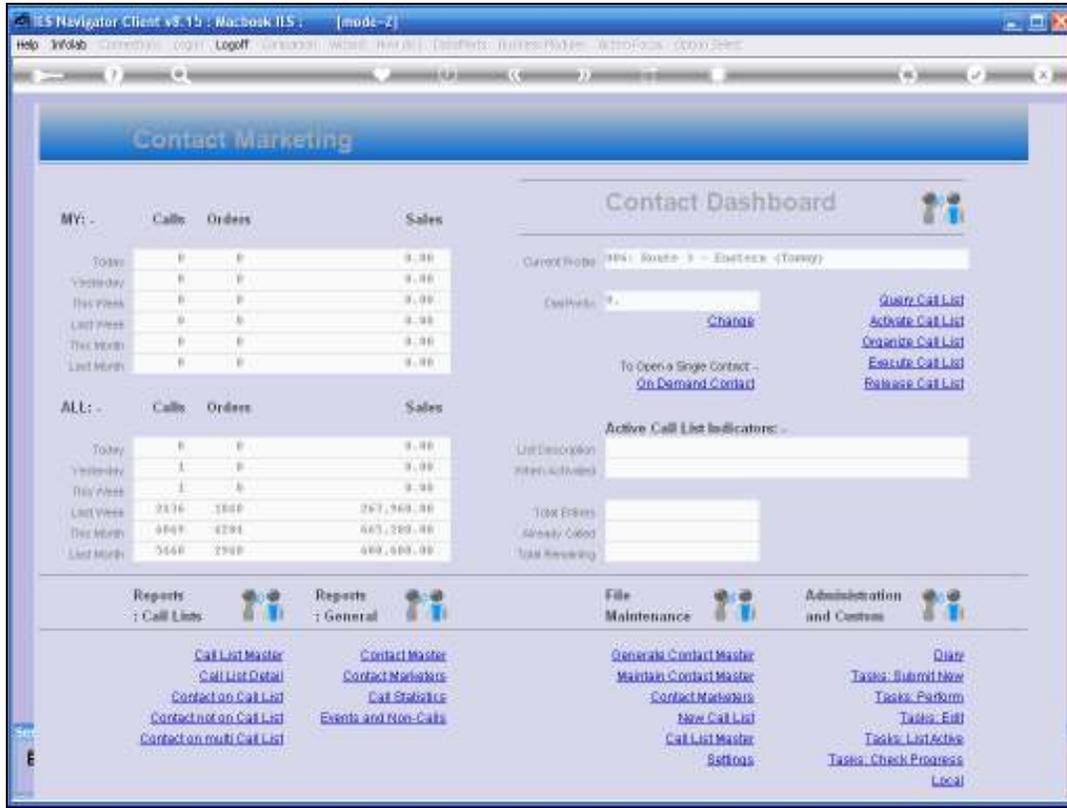
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Slide notes:



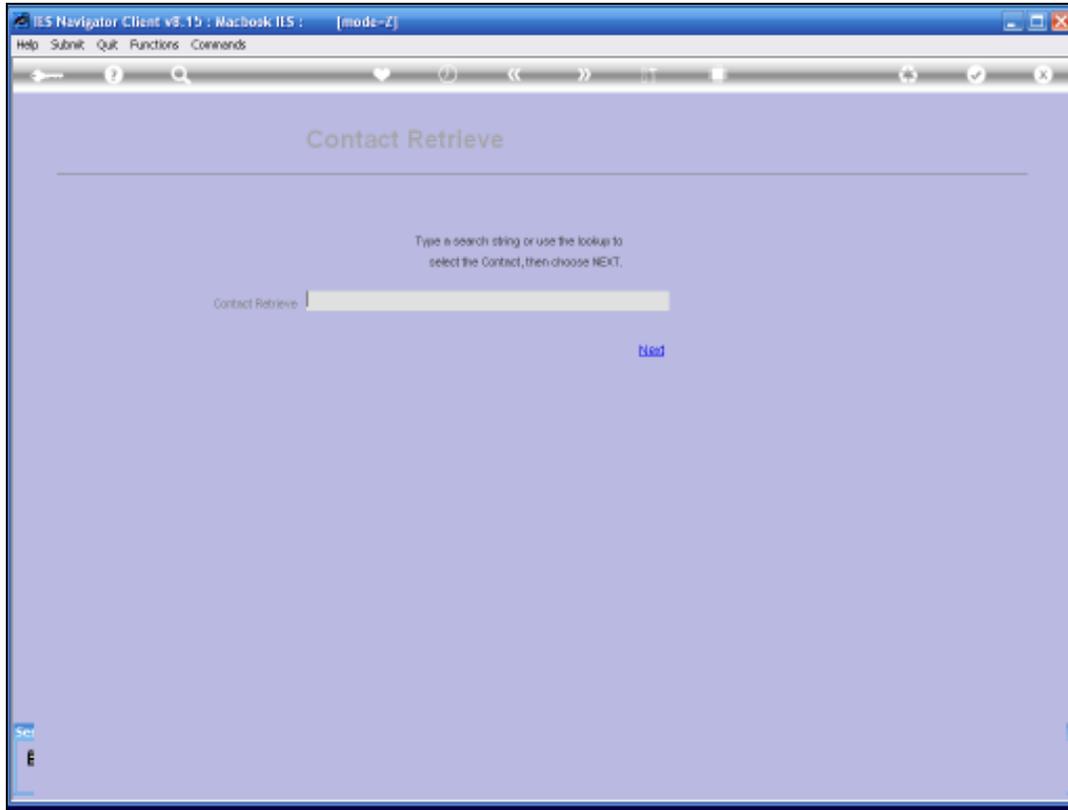
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Slide notes:



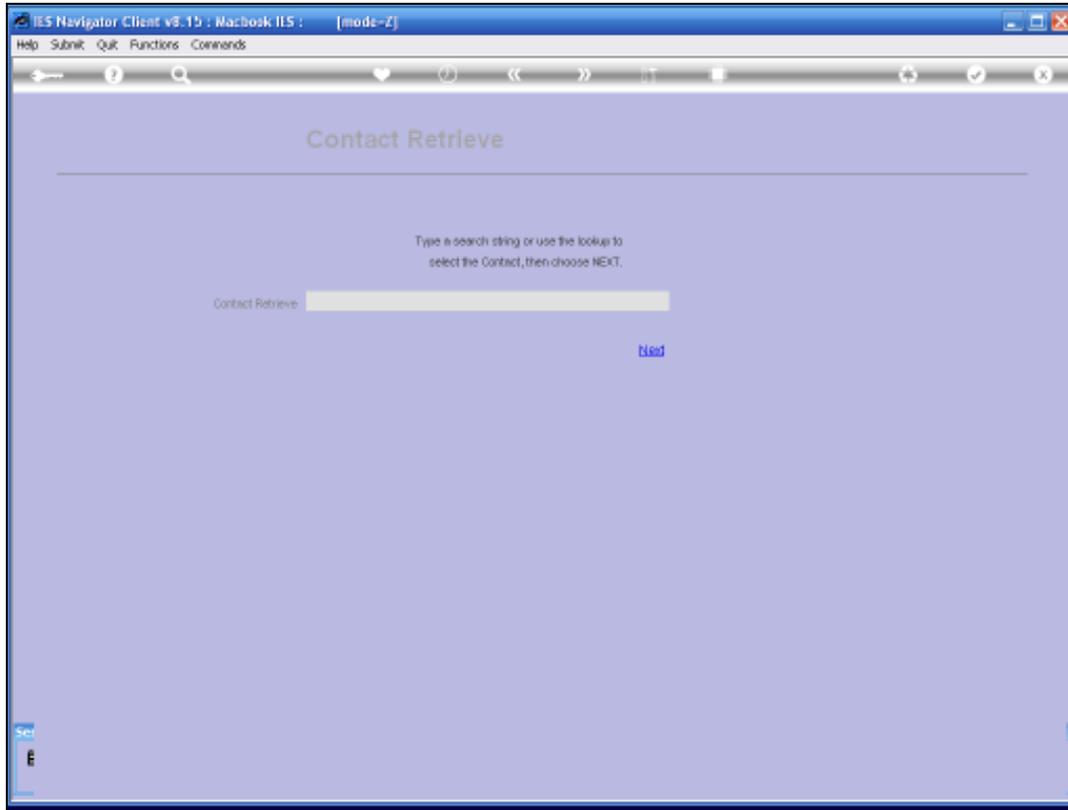
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Slide notes: Now back to the Contact Dashboard, where we have the same 'on demand' option. The only difference here is that we still have to select the Contact, because in this case it can be any Contact, and we need to select which Contact it is we wish to work with.



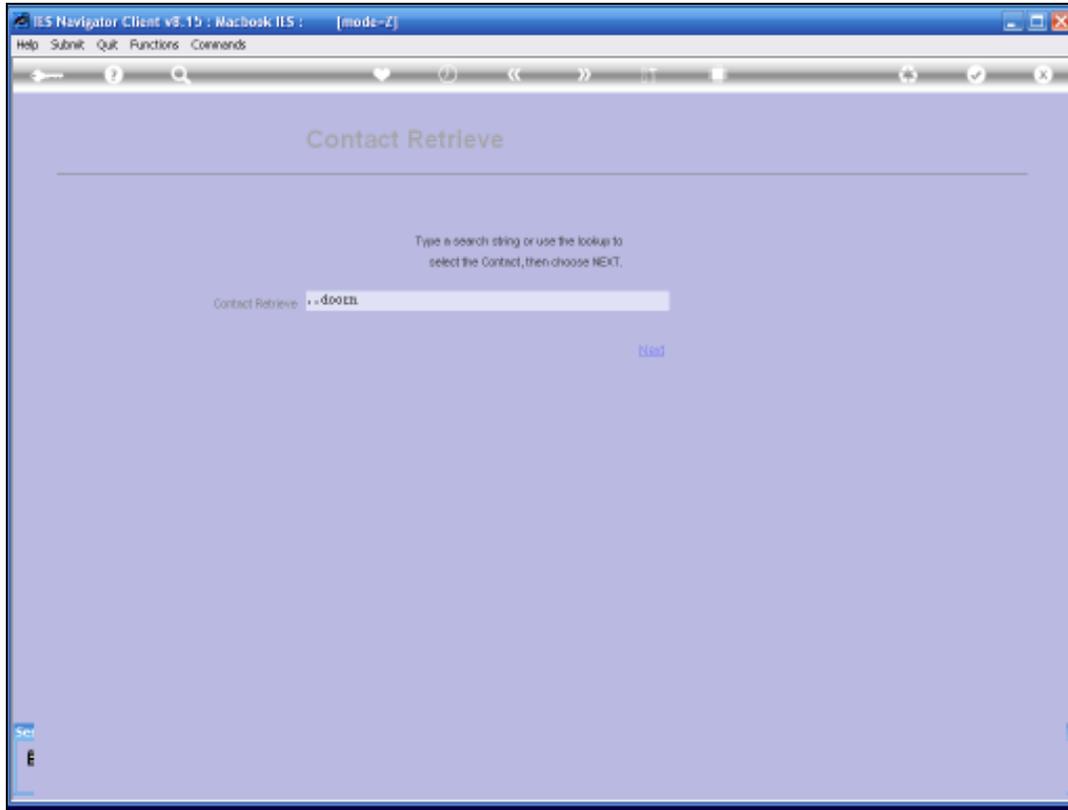
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Slide notes:



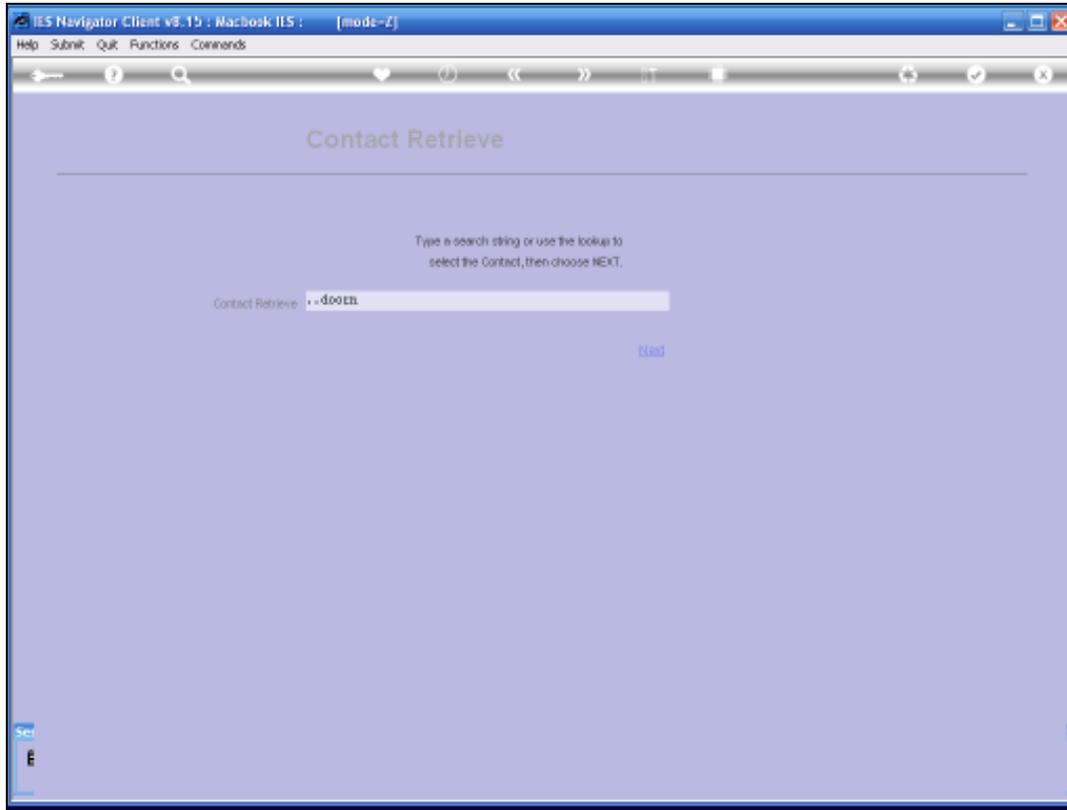
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Slide notes:



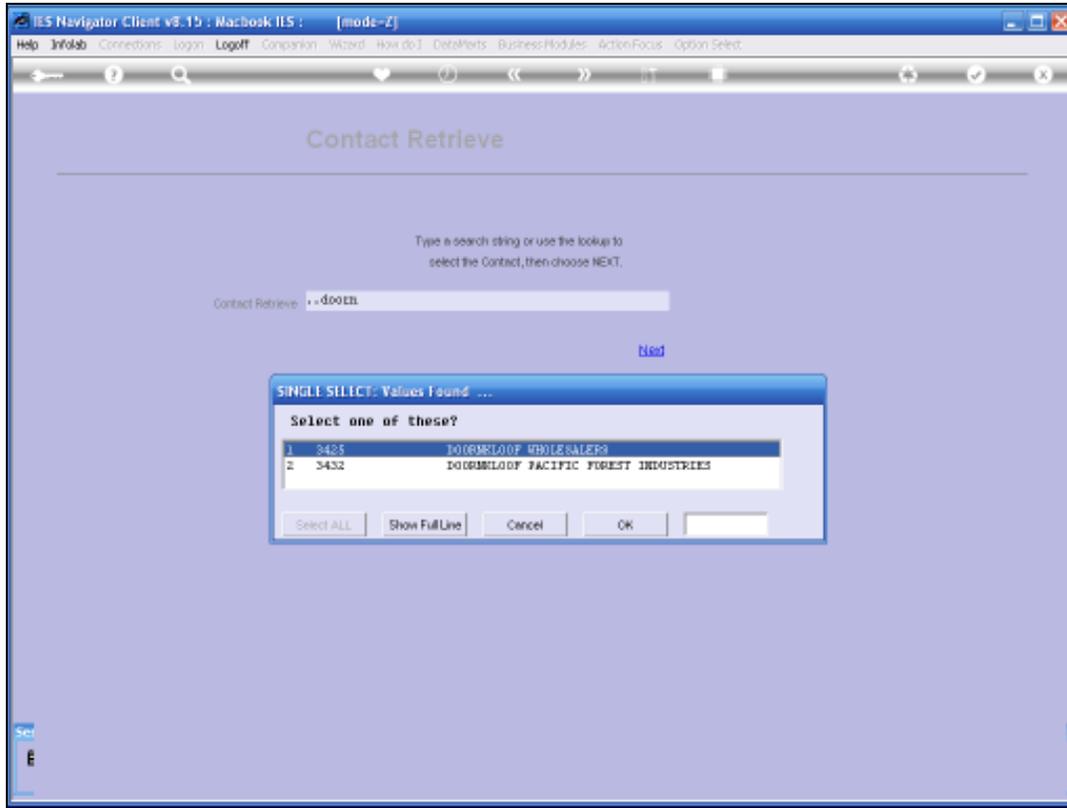
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Slide notes:



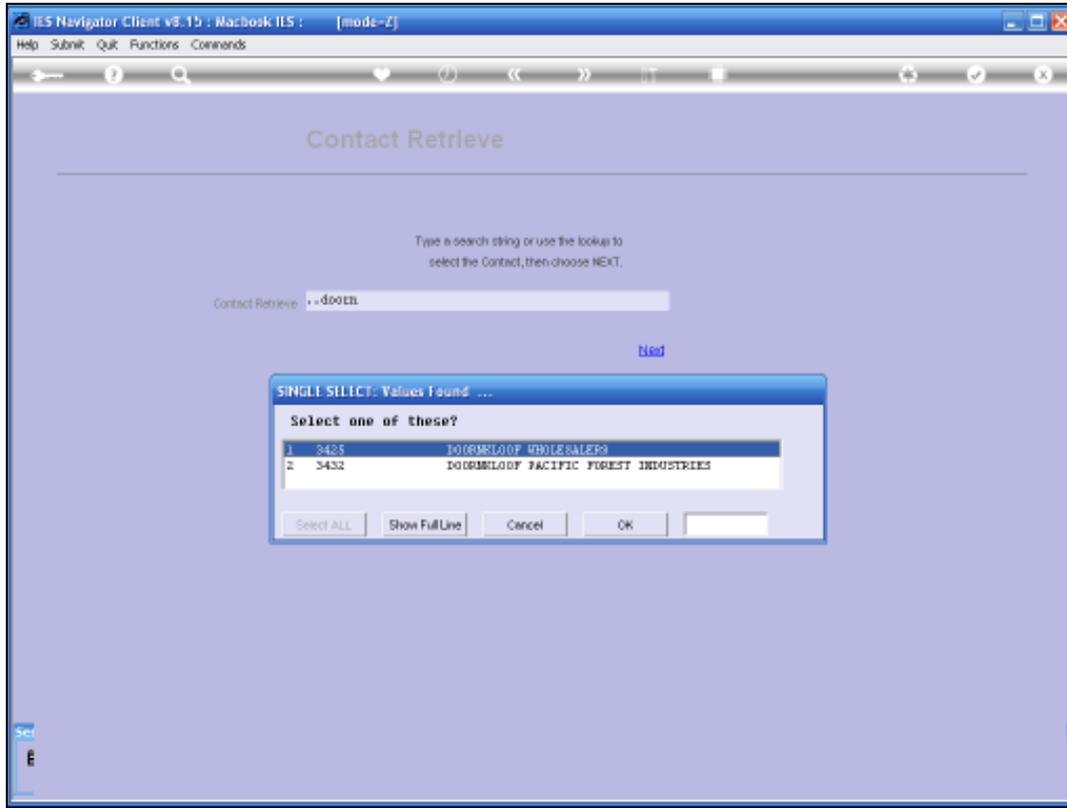
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Slide notes: So we select or lookup the Contact and choose NEXT.



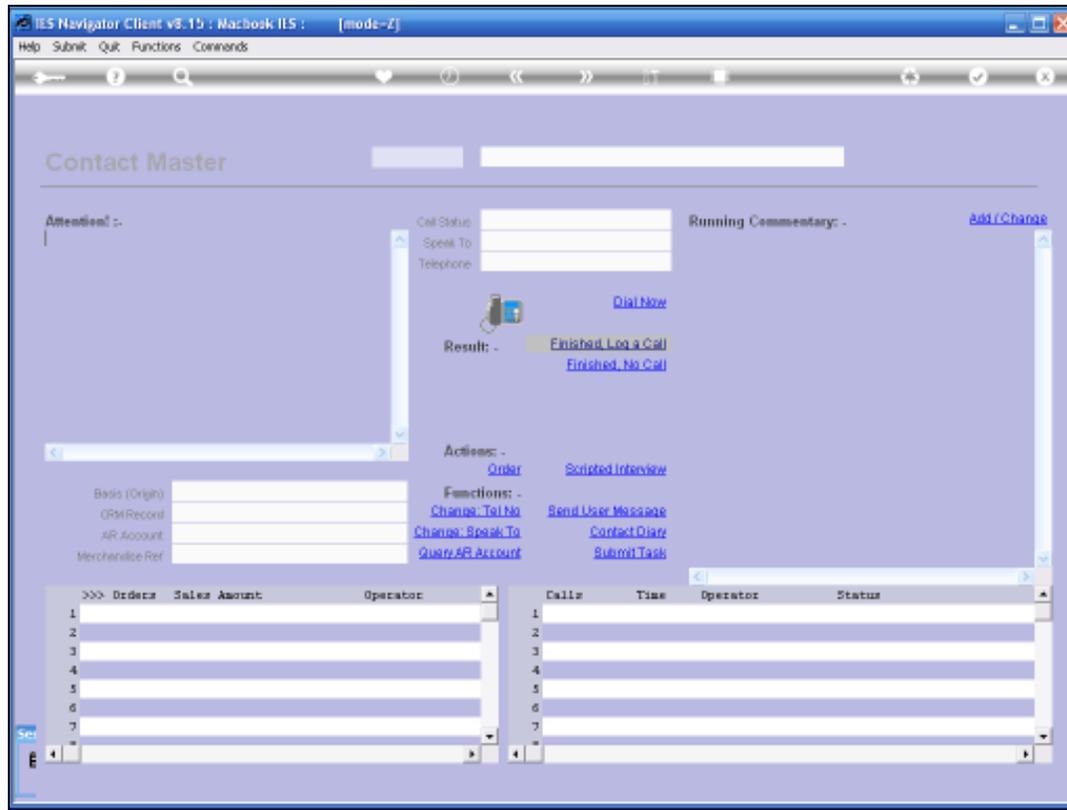
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Slide notes:



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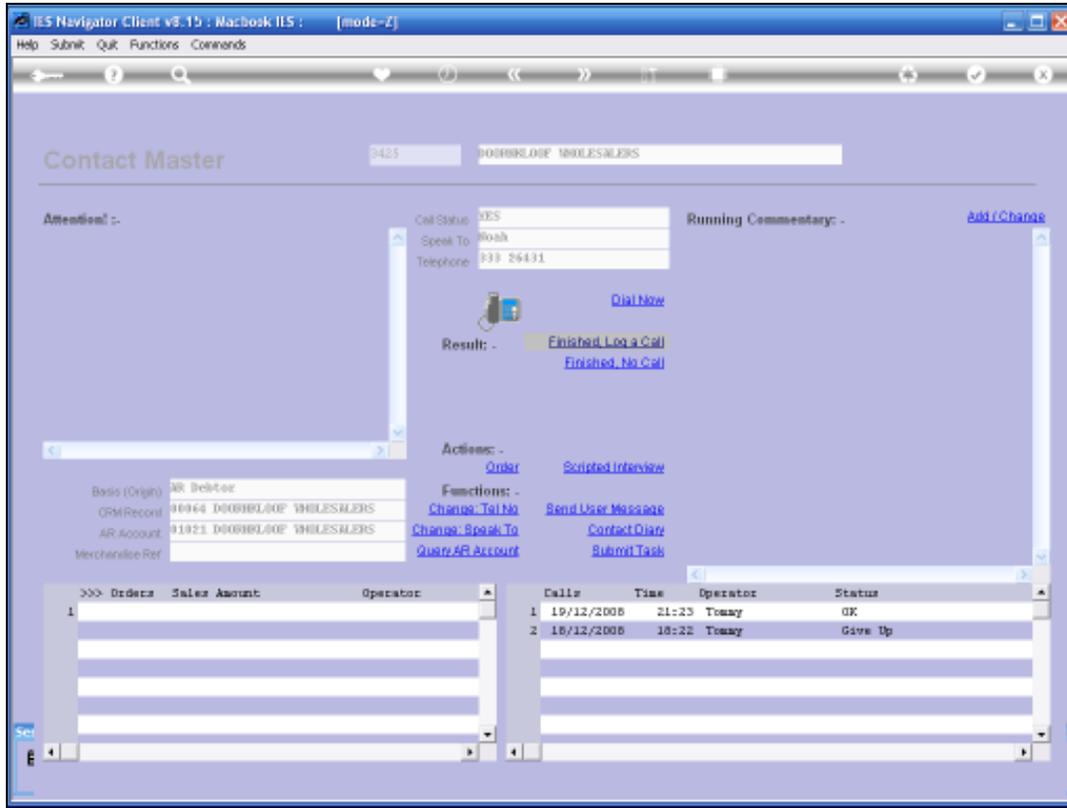
Slide notes:



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Slide notes: The DIRECT option for the Contact Call offers the same functions to dial, add commentary, and usage of the other functions. It is only the final event that is different here. Since we are not operating from a Call List in this situation, we have no DEFER, GIVE UP and PAUSE functions.

In fact, in many cases we will not even be making a call, instead we may simply be performing some administrative follow up action. Nevertheless, we have 2 options to 'finish up'. We can finish with a Call being logged, and we can finish without a Call being logged.



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Slide notes:

The screenshot shows a web application interface for 'Contact Marketing'. The browser window title is 'IIS Navigator Client vs. 1.5 : Macbook IIS : [mode=Z]'. The address bar shows a URL with 'http://'. The main content area is titled 'Contact Marketing' and 'Contact Dashboard'. It features two summary tables for 'MY' and 'ALL' sales data, a 'Current Node' field, a 'Call List' search box, and several navigation links. The 'MY' table shows zero sales for all periods. The 'ALL' table shows sales for the last week, month, and year. The 'Contact Dashboard' section includes a 'Current Node' field with the value '994 - Route 3 - Eastex - (Tower)', a 'Call List' search box, and links for 'Query Call List', 'Activate Call List', 'Create Call List', 'Execute Call List', and 'Release Call List'. Below these are sections for 'Active Call List Indicators' and 'File Maintenance'. The bottom of the page has four main categories: 'Reports : Call Lists', 'Reports : General', 'File Maintenance', and 'Administration and Control', each with a list of sub-links.

MY :	Calls	Orders	Sales
Today	0	0	0.00
Yesterday	0	0	0.00
This Week	0	0	0.00
Last Week	0	0	0.00
This Month	0	0	0.00
Last Month	0	0	0.00

ALL :	Calls	Orders	Sales
Today	0	0	0.00
Yesterday	1	0	0.00
This Week	1	0	0.00
Last Week	2136	1880	267,560.00
This Month	4849	4294	605,280.00
Last Month	5640	2940	469,600.00

Current Node: 994 - Route 3 - Eastex - (Tower)

Call List: [Search Box] [Change](#)

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

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

Active Call List Indicators :

Call List Description when activated

Total Orders

Already Closed

Total Remaining

Reports : Call Lists [Call List Master](#) [Call List Detail](#) [Contact on Call List](#) [Contact not on Call List](#) [Contact on multi Call List](#)

Reports : General [Contact Master](#) [Contact Masters](#) [Call Statistics](#) [Events and Non-Calls](#)

File Maintenance [General Contact Master](#) [Maintain Contact Master](#) [Contact Masters](#) [New Call List](#) [Call List Master](#) [Settings](#)

Administration and Control [Disk](#) [Tasks - Submit New](#) [Tasks - Perform](#) [Tasks - Edit](#) [Tasks - List/Active](#) [Tasks - Check Progress](#) [Local](#)

Slide 19

Slide notes:

The screenshot displays the IIS Navigator Client interface for 'Macbook IIS'. The main content area is titled 'Contact Marketing' and features a 'Contact Dashboard' for '994 - Route 3 - Eureka - (Toway)'. The dashboard includes a 'Current Node' field, a 'Call List' dropdown menu with a 'Change' button, and a link to 'On Demand Contact List'. Below this, there are sections for 'Active Call List Indicators' and 'List Description when activated'. The bottom of the dashboard is divided into four functional areas: 'Reports : Call Lists', 'Reports : General', 'File Maintenance', and 'Administration and Control'. Each area contains several sub-links for managing call lists and contact data.

MY:	Calls	Orders	Sales
Today	0	0	0.00
Yesterday	0	0	0.00
This Week	0	0	0.00
Last Week	0	0	0.00
This Month	0	0	0.00
Last Month	0	0	0.00

ALL:	Calls	Orders	Sales
Today	0	0	0.00
Yesterday	1	0	0.00
This Week	1	0	0.00
Last Week	2136	1880	267,560.00
This Month	4849	4294	603,280.00
Last Month	5640	2940	469,000.00

**Reports : Call Lists**

- Call List Master
- Call List Detail
- Contact on Call List
- Contact not on Call List
- Contact on multi Call List

**Reports : General**

- Contact Master
- Contact Masters
- Call Statistics
- Events and Non-Calls

**File Maintenance**

- General Contact Master
- Maintain Contact Master
- Contact Masters
- New Call List
- Call List Master
- Settings

**Administration and Control**

- Diagnose
- Tasks: Submit New
- Tasks: Perform
- Tasks: Edit
- Tasks: List/Active
- Tasks: Check Progress
- Local

Slide 20

Slide notes: So we have now seen the operation and usefulness of the "On Demand" option.