ICE Business System

ContactTracker – Processing

(Version – V1.0)

Learning Unit Guide

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I : Introduction

This Learning Unit Guide is reference-based, in that most of the information for the tasks can be found in the **Signature Learning Centre**.

This guide is designed as a workbook to be used during facilitator led learning.

It includes instructional materials, descriptions of business processes and details of demonstrations to be undertaken by the facilitator.

There are references to **menu paths** for accessing the functions within **ICE** application and **SLC References** for locating additional information in the **Signature Learning Centre**.

II : Objectives

To understand and appropriately process within the ContactTracker application.

III : Target Audience

Sales staff responsible for using the ContactTracker application.

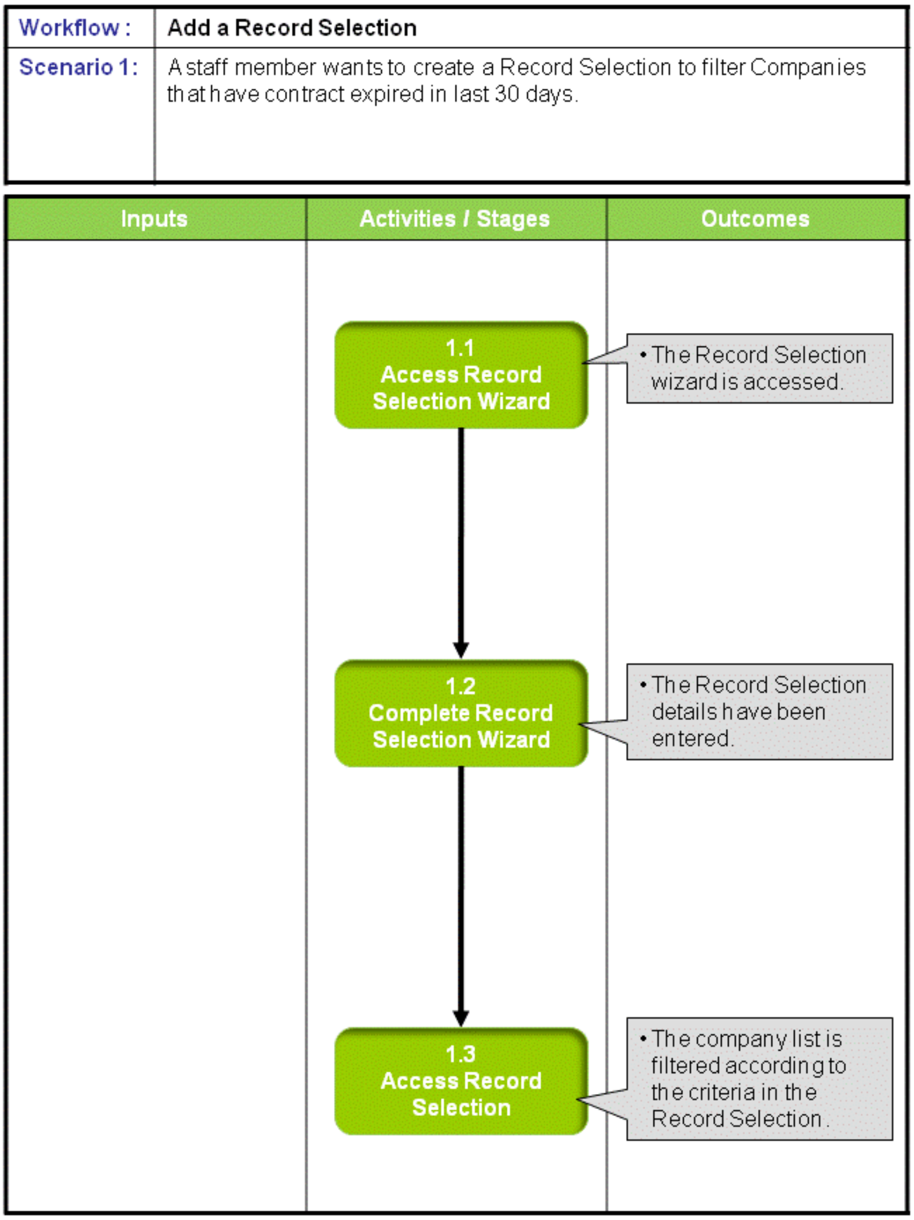
IV : Prerequisites

- ContactTracker Slideshows

V : Scenarios

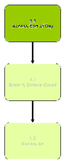
Scenario 1: Add a Record Selection

Workflow



Scenario 1: Add a Record Selection

A staff member wants to create a Record Selection to filter Companies that have contract expired in last 30 days.



1.1: *Access Record Selection Wizard*

Objectives:
• Access the Record Selection area.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker
1. Click **Settings & Management** tab. 2. Click **Record Selections** button.

Outcomes:
• The Record Selection wizard is accessed.
Notes:
• N/A

1.2: Complete Record Selection Wizard

Objectives:
• Enter Record Selection details.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: Record Selection Wizard - Start
1. Select **Create New Selection** radio button. *2.* Click **Next** to continue.
Screen: Record Selection Wizard – Selection Details
3. Enter **Selection Name**. *In this example the name could be:* *“Companies with contracts expired in last 30 days”* 4. Select **Address Type** option from drop-down list**.** 5. Select whether to **Only include primary contacts.** 6. Click **Next** to continue.

Screen: Record Selection Wizard – Criteria List

7. Click **Add**.

Screen: Record Selection Wizard – Field List

8. Select **Assets** from **Field Category** drop-down list.
9. Select **Contract Expiry Date** from Field List.
10. Click **Next** to continue.

Screen: Record Selection Wizard – Date Values

11. Select **is between** from **Operator** drop-down list.
12. Enter/Select Dynamic Dates of:
    30 Unit **Days Before today's date**
    0 Unit **Days Before today's date**

    Note:
    - *Fixed Dates are for specific dates and date ranges. E.g. Dates between 01/06/08 and 30/06/08.*
    - *Dynamic Dates are not specific. E.g. Dates up to 30 days before today's date (as in this example).*
    - *When using the "is between" operator, the order of values is important. i.e. with Dates the oldest date value is entered first and with Numbers the smallest number value is entered first.*

13. Click **Next** to continue.

Screen: Record Selection Wizard – Criteria List

Note:
- *Further criteria can be added by clicking on the **Add** button*
- *Adding further criteria will add extra conditions to the record selection.*
  For example, we could restrict the companies listed to having and expiry date in the last 30 days AND having Canon (or Nokia) assets.

14. Click **Next** to continue when all criteria has been added.

Screen: Record Selection Wizard – Summary

Note:
- *A summary is displayed.*

15. Click **Finish** to close the Record Selection Wizard.

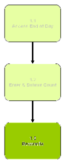
Outcomes:

- The Record Selection details have been entered.

Notes:

- Remember to click **Save** button in **Modify** tab to save changes to database.

Note:
- *An alternative to selecting "Save" is to click the "Save Changes" icon at the top of the screen.*
- *Exiting the application without manually saving will result in loss of any updates.*



1.3: *Access Record Selection*

Objectives:
• Access the Record Selection and filter company list.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

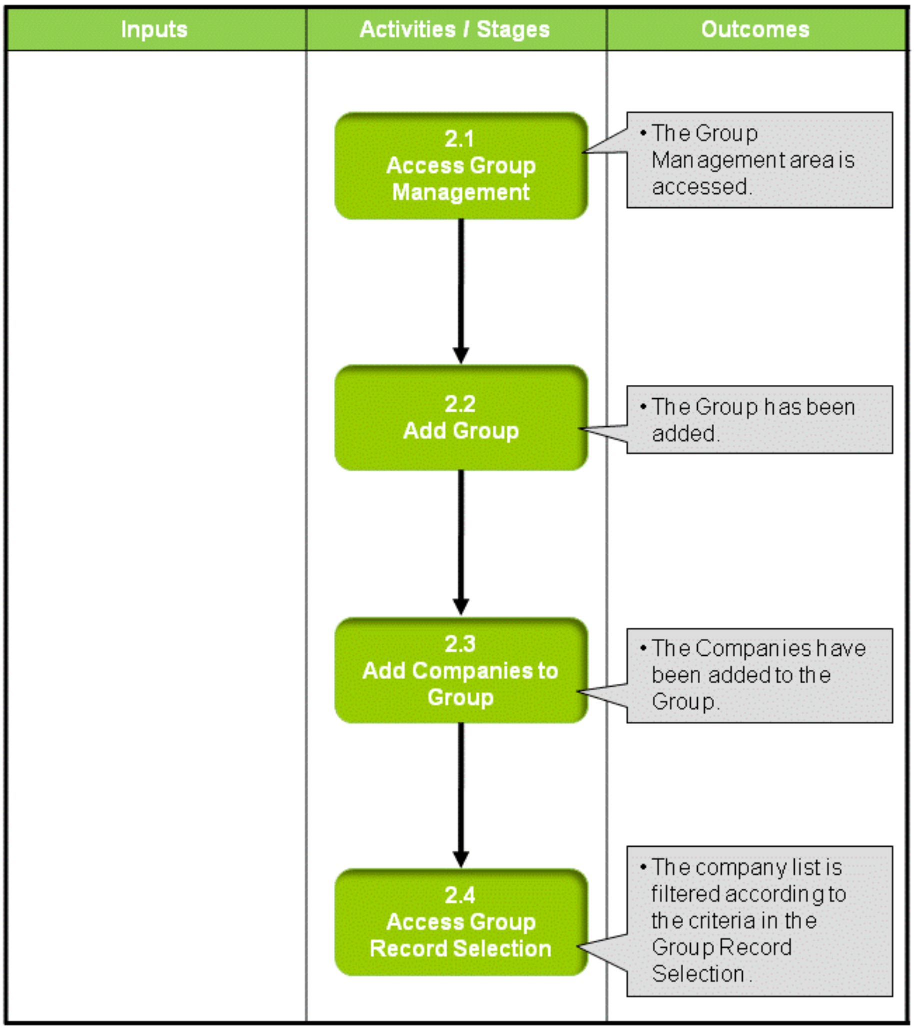
Screen: ContactTracker
1. Select required selection from **Selection** drop-down list in List Section. ***Note:*** ▪ *Customised Record Selections will be blue in the list.* ▪ *In this example the option selected is **"Companies with contracts expired in last 30 days"***

Outcomes:
• The company list is filtered according to the criteria in the Record Selection.
Notes:
• N/A

Scenario 2: Create Group and Add Companies

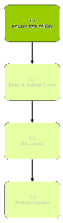
Workflow

Workflow :	Create Group and Add Companies
Scenario 2:	A staff member wants to create a new group of companies for an upcoming marketing campaign.



Scenario 2: Create Group and Add Companies

A staff member wants to create a new group of companies for an upcoming marketing campaign.



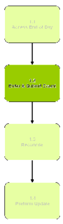
2.1: *Access Group Management*

Objectives:
• Access the Group Management area.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker
1. Click **Settings & Management** tab. 2. Click **Manage Groups** button.

Outcomes:
• The Group Management area is accessed.
Notes:
• N/A



2.2: *Add Group*

Objectives:
• Add a Group.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: Group Definitions
1. Click **Add** button.
Screen: Webpage Dialog
Note: ▪ *A new dialog window is displayed.* 2. Enter **Display Name** for new group. 3. Click **OK** button.

Screen: Group Definitions

Note:

- *The new group is added to the list of existing groups*

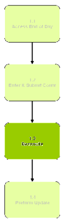
4. Click **Close** button.

Outcomes:

- The Group has been added.

Notes:

- N/A



2.3: *Add Companies to Group*

Objectives:

- Add companies to newly created group.

SLC Reference:

- ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker

1. Click **Companies** tab in List Section.
2. Select required **company** from Company List.

   Note:

   - *Find can be used to locate company*

3. Click **Modify** tab in Navigation Section.
4. Click **Add to Group** button.

Screen: Dialog

5. Select required **Group** from drop-down list.

   Note:

   - *Select group just added in last stage.*
   - *A new group can be added at this stage by clicking **Definitions** button.*

6. Select required options.

   Note:

   - *Options specify which contacts to use etc..*

7. Click **OK**.

Screen: ContactTracker

8. Repeat steps 1 – 7 for any additional companies to be added to group.

Outcomes:

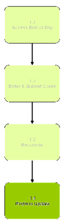
- The Companies have been added to the Group.

Notes:

- Remember to click **Save** button in **Modify** tab to save changes to database.

Note:

- *An alternative to selecting "Save" is to click the "Save Changes" icon at the top of the screen.*
- *Exiting the application without manually saving will result in loss of any updates.*



2.4: *Access Group Record Selection*

Objectives:

- Access the Group Record Selection and filter company list.

SLC Reference:

- ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker

1. Select required Group selection from **Selection** drop-down list in List Section.

Note:

- *Customised Group Record Selections will be red in the list.*

Outcomes:

- The company list is filtered according to the criteria in the Group Record Selection.

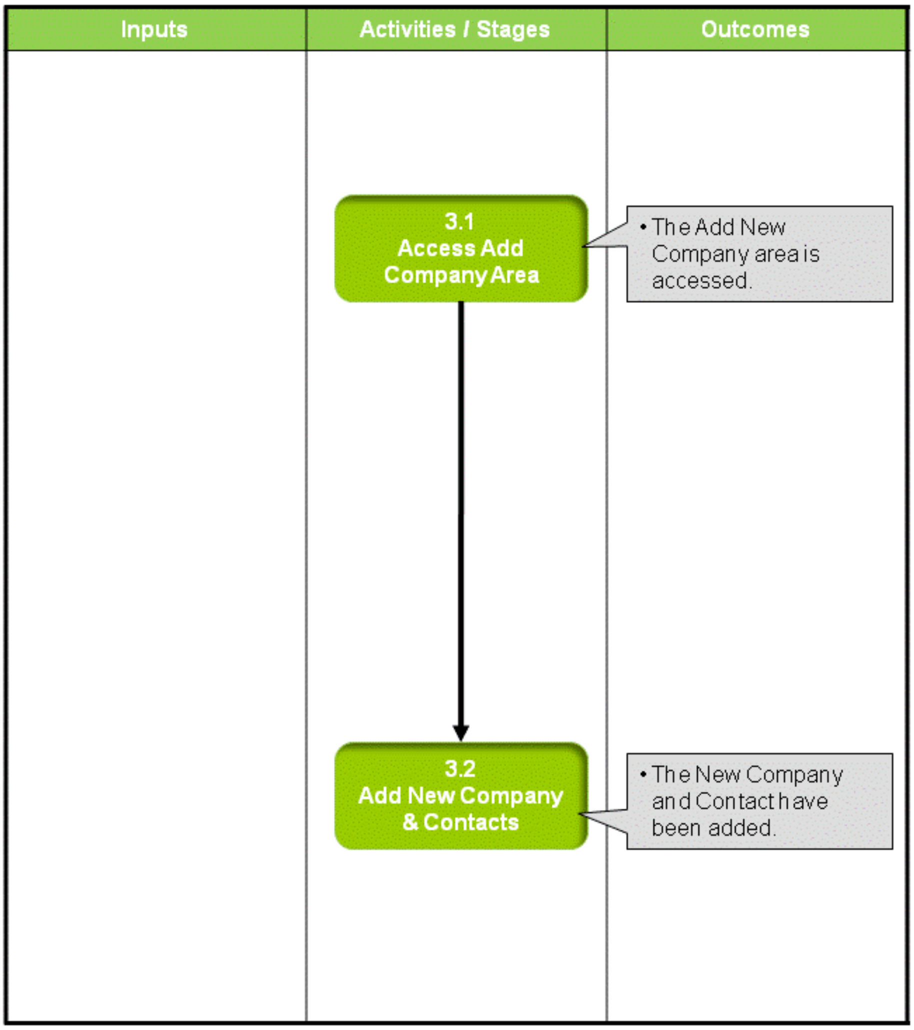
Notes:

- N/A

Scenario 3: Add New Company and Contacts

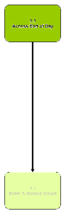
Workflow

Workflow :	Add New Company and Contacts
Scenario 3:	A staff member wants to create a new company and contacts in the ContactTracker database.



Scenario 3: Add New Company and Contacts

A staff member wants to create a new company and contacts in the ContactTracker database.



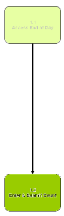
3.1: *Access Add Company Area*

Objectives:
• Access the Add Company area.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker
1. Click **Modify** tab.
2. Click **New** button to add new company.

Outcomes:
• The Add New Company area is accessed.
Notes:
• N/A



3.2: *Add New Company & Contacts*

Objectives:
• Add New Company.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker

1. Enter required details into the relevant blank **Company** fields in the Card Section.
2. Enter required details into the relevant blank **Contact** fields in the Card Section.

Note:

- *Some fields require an entry.*
- *Some fields require selections from drop-down lists*
- *Ellipsis […] searches in one field may result in a number of other fields being populated.*
  E.g. Populating Suburb field will result in automatic population of State, Postcode and Country.

3. Click on further tabs in Card Section and repeat steps 1 – 2.

   Note:
   - *Tabs and fields are customisable.*

4. Click **Save** button in **Modify** tab to save changes to database.

   Note:
   - *An alternative to selecting “Save” is to click the “Save Changes” icon at the top of the screen.*
   - *Exiting the application without manually saving will result in loss of any updates.*

Outcomes:

- The New Company and Contact have been added.

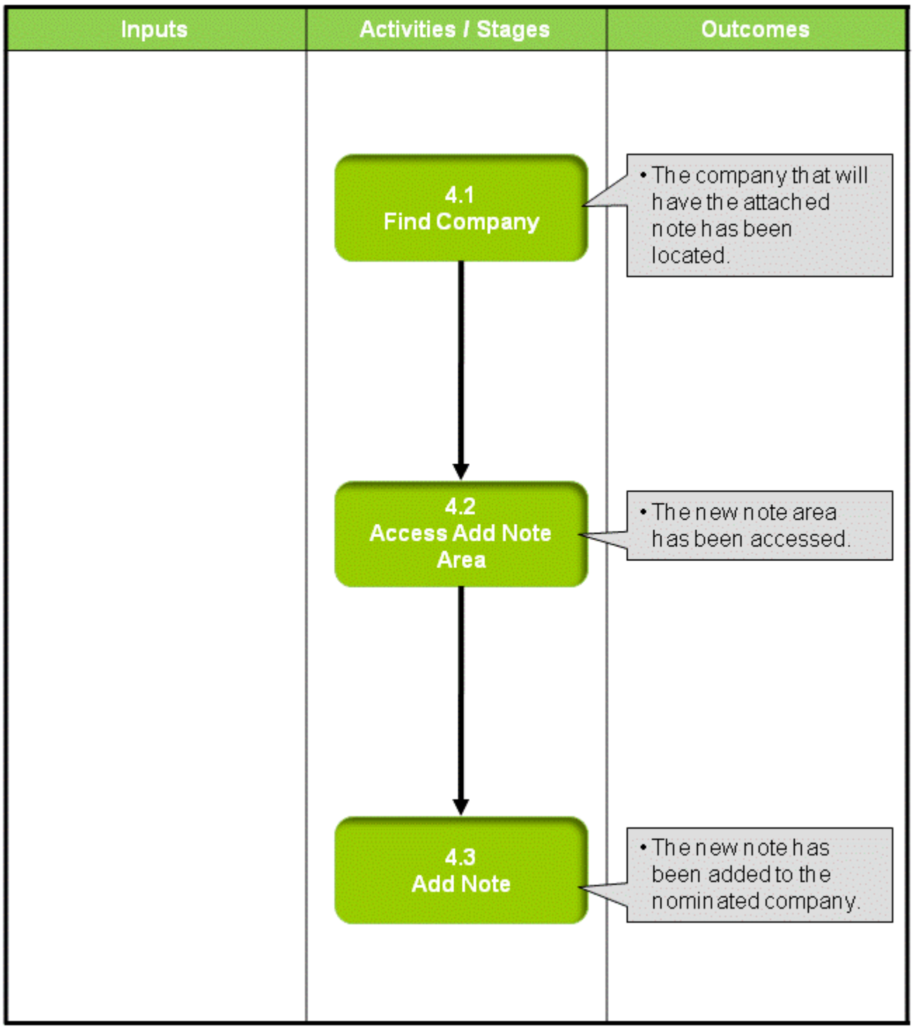
Notes:

- To add further contacts:
  - Locate **company** in List Section
  - Click on **Contacts** tab in List Section
  - Click on **Add Contact** button
  - Add **Contact details** in Card Section

Scenario 4: Add Note to a Company

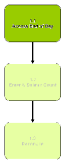
Workflow

Workflow :	Add Note to a Company
Scenario 4:	A staff member wants to create a new note and attach it to a company in the ContactTracker database.



Scenario 4: Add Note to a Company

A staff member wants to create a new note and attach it to a company in the ContactTracker database.



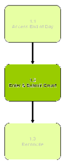
4.1: *Find Company*

Objectives:
• Find required company.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker
1. Use **Find** in List Section to locate required company.

Outcomes:
• The company that will have the attached note has been located.
Notes:
• N/A



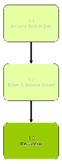
4.2: *Access Add Note Area*

Objectives:
• Access the Add Note area.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker
1. Use **Find** in List Section to locate required company. 2. Click **Notes** tab in List Section. 3. Click **Add Note** button to add new note.

Outcomes:
• The new note area has been accessed.
Notes:
• N/A



4.3: *Add Note*

Objectives:
• Add new note.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

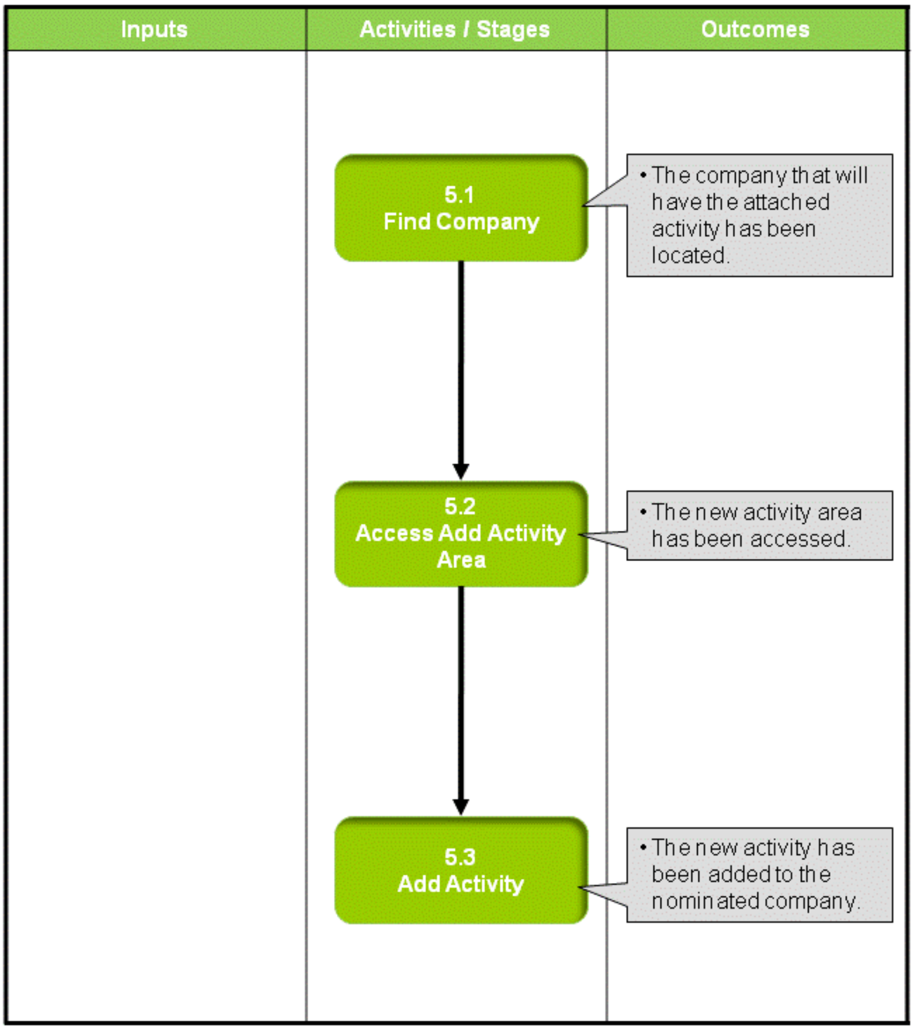
Screen: Note
1. Select **Belongs To** entry from drop-down list. ***Note:*** ▪ *Notes can be attached to Companies or Contacts* ▪ *It is recommended that notes be attached to the company as contacts may come and go.* 2. Select **Category** entry from drop-down list. ***Note:*** ▪ *An new Category entry can also be typed in.* 3. Select **Subject** entry from drop-down list. ***Note:*** ▪ *An new Subject entry can also be typed in.* 4. Enter **Details**. 5. Click **Save** to update database. 6. Click **Close** when note has been saved**.**

Outcomes:
• The new note has been added to the nominated company.
Notes:
• New note should now be displayed in the list on the Notes tab for that company.

Scenario 5: Add Activity to a Company

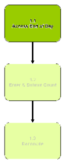
Workflow

Workflow :	Add Activity to a Company
Scenario 5:	A staff member wants to create a new activity and attach it to a company in the ContactTracker database.



Scenario 5: Add Activity to a Company

A staff member wants to create a new activity and attach it to a company in the ContactTracker database.



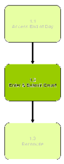
5.1: *Locate Company*

Objectives:
• Locate required Company.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker
1. Use **Find** in List Section to locate required company.

Outcomes:
• The company that will have the attached activity has been located.
Notes:
• N/A



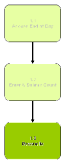
5.2: *Access Add Activity Area*

Objectives:
• Access the Add Activity area.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker
1. Click **Activities** tab in List Section. 2. Click **Add Activity** button to add new activity.

Outcomes:
• The new activity area has been accessed.
Notes:
• N/A



5.3: *Add Activity*

Objectives:

- Add new activity.

SLC Reference:

- ContactTracker > Processing Activities

Work Instructions

Screen: Activity

1. Select **Belongs To** entry from drop-down list.

   Note:
   - *Activities can be attached to Companies or Contacts*
   - *It is recommended that activities be attached to the company as contacts may come and go.*

2. Select **Dates/Times/Durations** entries from drop-down lists.
3. Select **Subject/Location** entries from drop-down lists.

   Note:
   - *New entries can also be typed in.*

4. Enter **Details**.
5. Select **Attendees**.

   Note:
   - *Click ellipsis [...] to select attendees from the contacts for this company.*

6. Select whether ...**to create an Outlook entry**

   Note:
   - *Details will be copied to MS Outlook and reminders set at dates and times used in the activity.*
   - *This is a one-way transfer.*
     i.e. Changes in Outlook will not be transferred to back to ContactTracker.

7. Click **Save** to update database.
8. Click **Close** when note has been saved.

Outcomes:

- The new activity has been added to the nominated company.

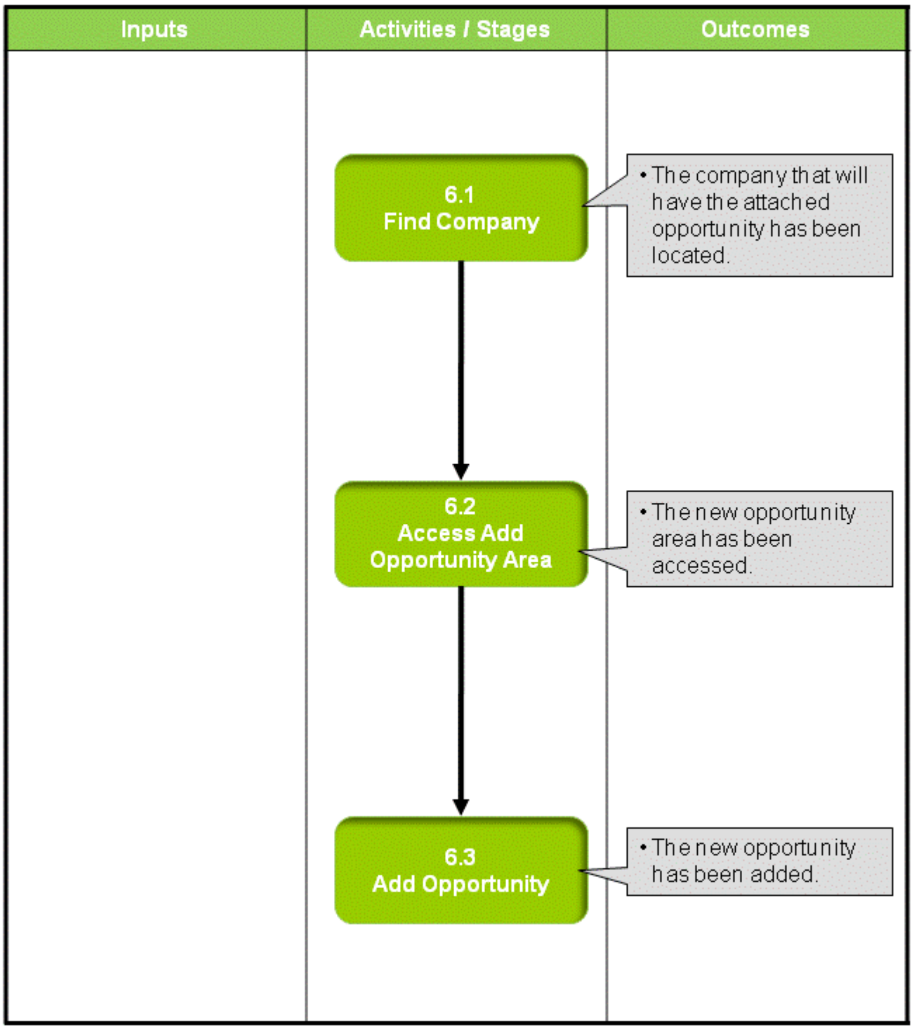
Notes:

- New activity should now be displayed in the list on the Activities tab for that company.

Scenario 6: Add Opportunity to a Company and Campaign

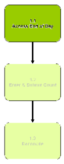
Workflow

Workflow :	Add Opportunity to a Company and Campaign
Scenario 6:	A staff member wants to create a new opportunity and attach it to a company and a campaign in the ContactTracker database.



Scenario 6: Add Opportunity to a Company and Campaign

A staff member wants to create a new opportunity and attach it to a company and a campaign in the ContactTracker database.



6.1: *Locate Company*

Objectives:
• Locate required Company.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker
1. Use **Find** in List Section to locate required company.

Outcomes:
• The company that will have the attached opportunity has been located.
Notes:
• N/A

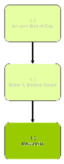
6.2: *Access Add Opportunity Area*

Objectives:
• Access the Add Opportunity area.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker
1. Click **Opportunities** tab in List Section.
2. Click **Add Opportunity** button to add new opportunity.

Outcomes:
• The new opportunity area has been accessed.
Notes:
• N/A



6.3: *Add Opportunity*

Objectives:

- Add new opportunity.

SLC Reference:

- ContactTracker > Processing Activities

Work Instructions

Screen: Opportunity – Main tab

1. Select **Description** entry from drop-down list.

   Note:
   - *New entries can also be typed in.*

2. Select **Start Date** entry from drop-down calendar.
3. Select **Close Date** entry from drop-down calendar.
4. Select **Sales Stage** entries from drop-down lists.

   Note:
   - *New entries can also be typed in.*

5. Enter **Product / Quantity / Unit Price.**
6. Click **Add** button to add an calculated estimate into the **Grid** and a Sum Total into the **Total** field .
7. Repeat steps 5-6 until all products in the opportunity have entered.
8. Select **Owner**.
9. Select required **Status** from the radio buttons.

Screen: Opportunity – Additional tab

10. Select **Campaign** from list.

    Note:
    - *The opportunity is then attached to that campaign.*
    - *This is useful as opportunities can then be tracked on the Opportunities by Campaign Report.*

11. Enter any other required details on this or other tabs.
12. Click **Save** to update database when all entries are completed.
13. Click **Close** when opportunity has been saved**.**

Outcomes:

- The new opportunity has been added.

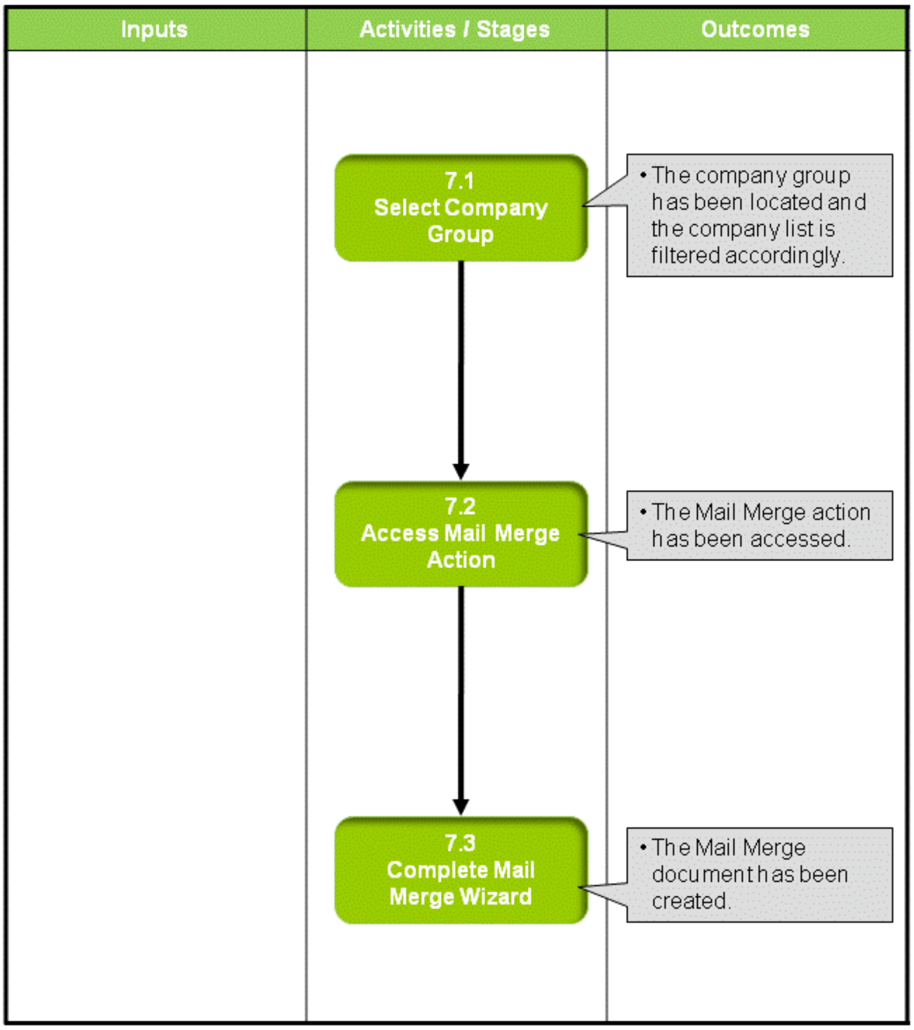
Notes:

- New opportunity should now be displayed in the list on the Opportunities tab for that company.

Scenario 7: Mail Merge Action

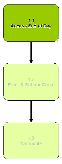
Workflow

Workflow :	**Mail Merge Action**
Scenario 7:	A staff member wants to create a new mail merge document based on an existing Mail Merge template and sent to a Company Group setup in the ContactTracker database.



Scenario 7: Mail Merge Action

A staff member wants to create a new mail merge document based on an existing Mail Merge template and sent to a Company Group setup in the ContactTracker database.



7.1: *Select Company Group*

Objectives:
• Locate required Company Group.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker
1. Select **Companies** tab in List Section. 2. Select required **Company Group** from **Selection** drop-down list in List Section. ***Note:*** ▪ *Red selections are Companies attached to Groups*

Outcomes:
• The company group has been located and the company list is filtered accordingly.
Notes:
• N/A

7.2: Access *Mail Merge Action*

Objectives:
• Access Mail Merge Action.
SLC Reference:
• ContactTracker > Processing Activities

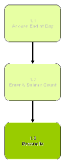
Work Instructions

Screen: ContactTracker
1. Select **Actions** tab in **Navigation** Section.

2. Click **Mail Merge** button in **Navigation** Section.

   Note:
   - *Alternative button for Mail Merge action is in top right corner of ContactTracker screen.*

Outcomes:
• The Mail Merge action has been accessed.
Notes:
• N/A



7.3: Complete Mail Merge Wizard

Objectives:
• Complete Mail Merge Wizard and create the Mail Merge document.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: Confirm Selection Webpage Dialog

1. Select which **records** are to be used.

   Note:
   - ***Current Selection*** *will use all records in Company List*
   - ***Current record only*** *will use only the highlighted record in Company List.*

2. Select which **contacts** are to be used.

   Note:
   - *These options are only available if "Current record only" is selected in step 1*

3. Click **OK** button to continue.

Screen: Web Service Wizard – Template Preview

4. Select which **template** is to be used.

   Note:
   - *Templates that have been uploaded appear in the template list.*
   - *For details on how to create and upload templates, see ContactTracker Marketing Slideshows*

5. Click **Next** button to continue.

Screen: Web Service Wizard – Mail Merge Options

6. Select required **Record Options**.

   Note:
   - *Selecting record options ensures that data rules retrieve records which have all the required information.*

7. Click **Next** button to continue.

Screen: Web Service Wizard – Map Field Codes

Note:
- *A dialog box may appear, informing us that some of the required fields from the template have not been mapped to the respective fields in the database.*
- *If that is the case it may be necessary to map the fields manually by selecting the required tables and then the required fields.*

8. Click **Next** button to continue.

Screen: Web Service Wizard – Request Service & Data

Note:
- *This screen shows the data request progress.*
- *No action is required*
- *When the request is executed, the screen automatically changes to the Confirm Records screen.*

Screen: Web Service Wizard – Confirm Records

Note:
- *A list of records is displayed.*
- *This is the list of records that will be included in the Mail Merge document.*

9. Select or de-select any required **records** to fine-tune the list.
10. Click **Next** button to continue.

Screen: Web Service Wizard – Service Complete

11. Click **link** to download the Mail Merge document.
12. Click **Finish** button.

Outcomes:

- The Mail Merge document has been created.

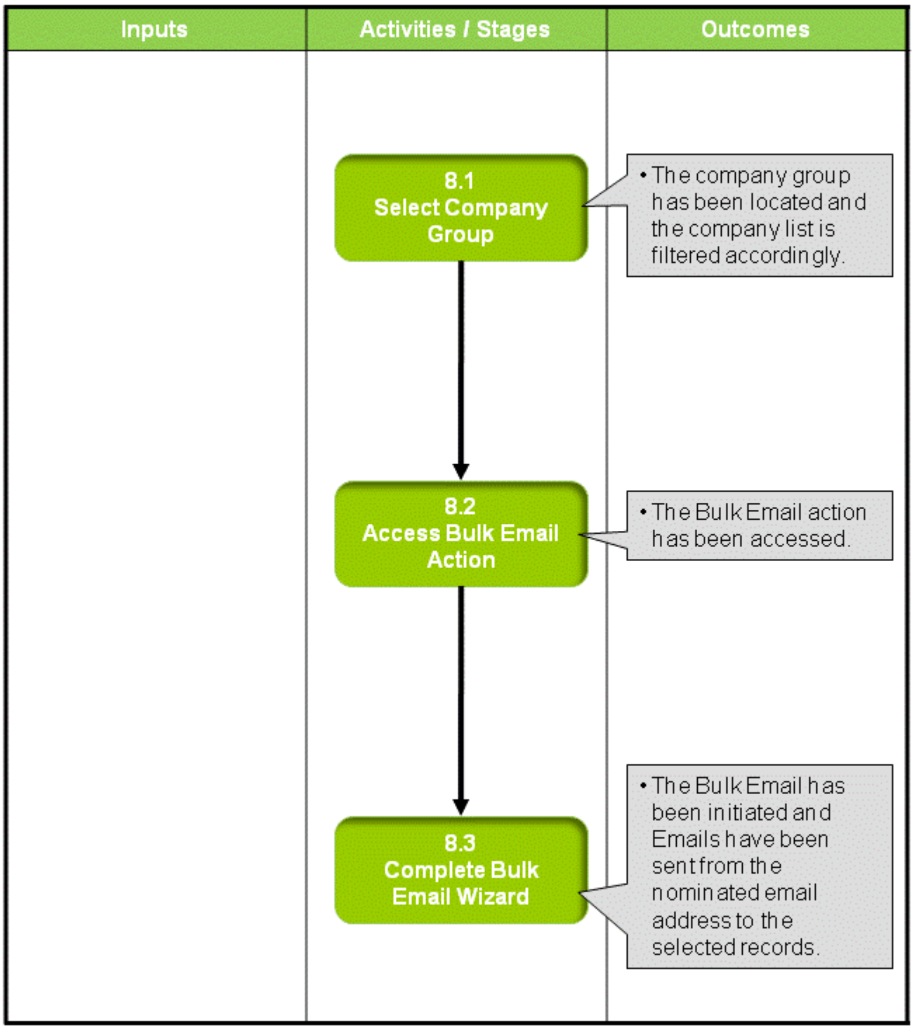
Notes:

- The Mail Merge document can be opened or saved as any other windows document.
- The document will contain the required information from the selected records in the format of the selected template.
- It is possible to add a Scheduler to ContactTracker and automate the Mail Merge process.
- This would allow the creation of recurring letters on a nominated schedule (e.g. 1st of month etc.).

Scenario 8: Bulk Email Action

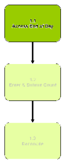
Workflow

Workflow :	Bulk Email Action
Scenario 8:	A staff member wants to create bulk emailing based on an existing Bulk Email template and sent to a Company Group setup in the ContactTracker database.



Scenario 8: Bulk Email Action

A staff member wants to create bulk emailing based on an existing Bulk Email template and sent to a Company Group setup in the ContactTracker database.



8.1: *Select Company Group*

Objectives:

- Locate required Company Group.

SLC Reference:

- ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker

1. Select **Companies** tab in List Section.
2. Select required **Company Group** from **Selection** drop-down list in List Section.

Note:

- *Red selections are Companies attached to Groups*

Outcomes:

- The company group has been located and the company list is filtered accordingly.

Notes:

- N/A

8.2: Access Bulk Email Action

Objectives:

- Access Bulk Email Action.

SLC Reference:

- ContactTracker > Processing Activities

Work Instructions

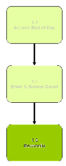
Screen: ContactTracker

1. Select **Actions** tab in **Navigation** Section.

2. Click **Bulk Email** button in **Navigation** Section.

   Note:
   - *Alternative button for Bulk Email action is in top right corner of ContactTracker screen.*

Outcomes:
• The Bulk Email action has been accessed.
Notes:
• N/A



8.3: Complete Bulk Email Wizard

Objectives:
• Complete Bulk Email Wizard and initiate a bulk emailing.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: Confirm Selection Webpage Dialog

1. Select which **records** are to be used.

   Note:
   - ***Current Selection*** *will use all records in Company List*
   - ***Current record only*** *will use only the highlighted record in Company List.*

2. Select which **contacts** are to be used.

   Note:
   - *These options are only available if “Current record only” is selected in step 1*

3. Click **OK** button to continue.

Screen: Web Service Wizard – Email Template Preview

4. Select which **template** is to be used.

   Note:
   - *Templates that have been uploaded appear in the template list.*
   - *For details on how to create and upload templates, see ContactTracker Marketing Slideshows*

5. Click **Next** button to continue.

Screen: Web Service Wizard – Email Options

6. Select required **Record Options**.

Note:
- *Selecting record options ensures that data rules retrieve records which have all the required information.*

7. Click **Next** button to continue.

Screen: Web Service Wizard – Map Field Codes

Note:
- *A dialog box may appear, informing us that some of the required fields from the template have not been mapped to the respective fields in the database.*
- *If that is the case it may be necessary to map the fields manually by selecting the required tables and then the required fields.*

8. Click **Next** button to continue.

Screen: Web Service Wizard – Request Service & Data

Note:
- *This screen shows the data request progress.*
- *No action is required*
- *When the request is executed, the screen automatically changes to the Confirm Records screen.*

Screen: Web Service Wizard – Confirm Records

Note:
- *A list of records is displayed.*
- *This is the list of records that will be included in the Bulk Email*
- *Records that don't have an email address are excluded from the list.*

9. Select or de-select any required **records** to fine-tune the list.
10. Click **Next** button to continue.

Screen: Web Service Wizard – Service Complete

11. Click **Finish** button.

Outcomes:

- The Bulk Email has been initiated and Emails have been sent from the nominated email address to the selected records.

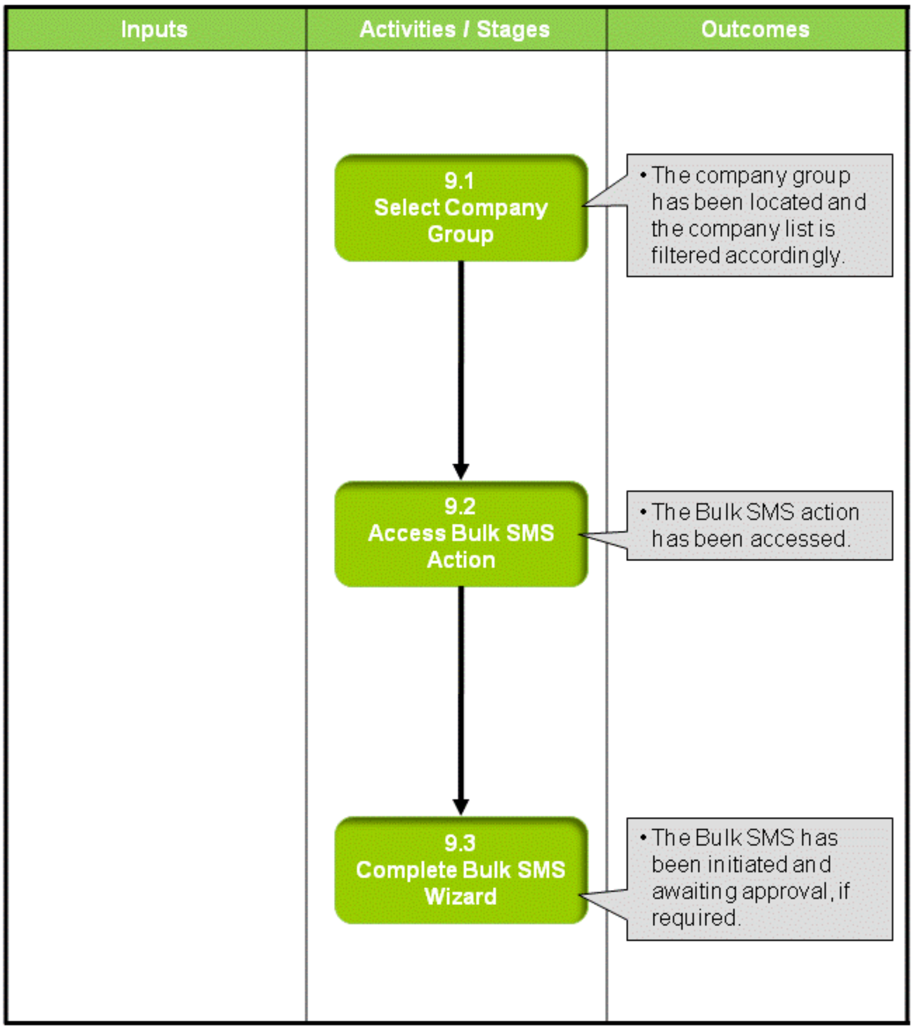
Notes:

- N/A

Scenario 9: Bulk SMS Action

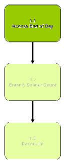
Workflow

Workflow :	Bulk SMS Action
Scenario 9:	A staff member wants to create bulk SMS mailing based on an existing Bulk SMS template and sent to a Company Group setup in the ContactTracker database.



Scenario 9: Bulk SMS Action

A staff member wants to create bulk SMS mailing based on an existing Bulk SMS template and sent to a Company Group setup in the ContactTracker database.



9.1: *Select Company Group*

Objectives:

- Locate required Company Group.

SLC Reference:

- ContactTracker > Processing Activities

Work Instructions

Screen: ContactTracker

1. Select **Companies** tab in List Section.
2. Select required **Company Group** from **Selection** drop-down list in List Section.

Note:

- *Red selections are Companies attached to Groups*

Outcomes:

- The company group has been located and the company list is filtered accordingly.

Notes:

- N/A

9.2: Access Bulk SMS Action

Objectives:

- Access Bulk SMS Action.

SLC Reference:

- ContactTracker > Processing Activities

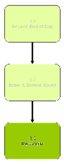
Work Instructions

Screen: ContactTracker

1. Select **Actions** tab in **Navigation** Section.

2. Click **Bulk SMS** button in **Navigation** Section. ***Note:*** ▪ *Alternative button for Bulk SMS action is in top right corner of ContactTracker screen.*

Outcomes:
• The Bulk SMS action has been accessed.
Notes:
• N/A



9.3: Complete Bulk SMS Wizard

Objectives:
• Complete Bulk SMS Wizard and initiate a bulk SMS mailing.
SLC Reference:
• ContactTracker > Processing Activities

Work Instructions

Screen: Confirm Selection Webpage Dialog
1. Select which **records** are to be used. ***Note:*** ▪ ***Current Selection*** *will use all records in Company List* ▪ ***Current record only*** *will use only the highlighted record in Company List.* 2. Select which **contacts** are to be used. ***Note:*** ▪ *These options are only available if "Current record only" is selected in step 1* 3. Click **OK** button to continue.
Screen: Web Service Wizard – SMS Options – Message Content
4. Select which **template** is to be used. or Create a free-form message by entering text into the textbox and inserting fields (e.g. customer name) from the drop-down lists ***Note:*** ▪ *Templates that have been uploaded appear in the template drop-down list.* ▪ *For details on how to create and upload templates, see ContactTracker Marketing Slideshows*

- *The message count gives an estimated number of characters for the message. This is finalised once the records are confirmed.*

5. Click **Next** button to continue.

Screen: Web Service Wizard – Map Field Codes

Note:

- *A dialog box may appear, informing us that some of the required fields from the template have not been mapped to the respective fields in the database.*
- *If that is the case it may be necessary to map the fields manually by selecting the required tables and then the required fields.*

6. Click **Next** button to continue.

Screen: Web Service Wizard – Request Service & Data

Note:

- *This screen shows the data request progress.*
- *No action is required*
- *When the request is executed, the screen automatically changes to the Confirm Records screen.*

Screen: Web Service Wizard – Confirm Records

Note:

- *A list of records is displayed.*
- *This is the list of records that will be included in the Bulk SMS*
- *Records that don't have a mobile number are de-selected in the list.*

7. Select or de-select any required **records** to fine-tune the list.
8. Click **Next** button to continue.

Screen: Web Service Wizard – SMS Job Review Page

Note:

- *Approval to transmit the messages is required.*
- *An email is sent to approvers, notifying them that they are required to login to ContactTracker and approve the job.*
- *If the user is also an approver then no approval is required.*

9. Click **Finish** button.

Outcomes:

- The Bulk SMS has been initiated and awaiting approval, if required.

Notes:

- N/A