CoLinear Systems, Inc.

# Telemarketing

v10

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Overview

This optional add-on module is designed to help Response users manage outbound telemarketing to prospects or existing customers. The telemarketing modules uses a Leads (LEADS) database table, to create and manage customers or prospects that require calling. Once each lead record is created it can be tracked and managed from within Response (i.e. Customer Service, customer, prospects, etc). Each lead will have preferred call times, call back dates, and other special notes pertaining to that lead.

MANY USERS ALSO LICENSE OUR TAPI INTERFACE SYSTEM, AND LINK IT TO THEIR TAPI PHONE SYSTEMS FOR MAXIMUM PERFORMANCE GAIN.

Setup

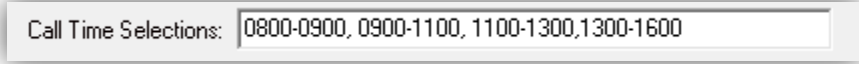**Menu Path:** Add-Ons / Telemarketing / Telemarketing Setup
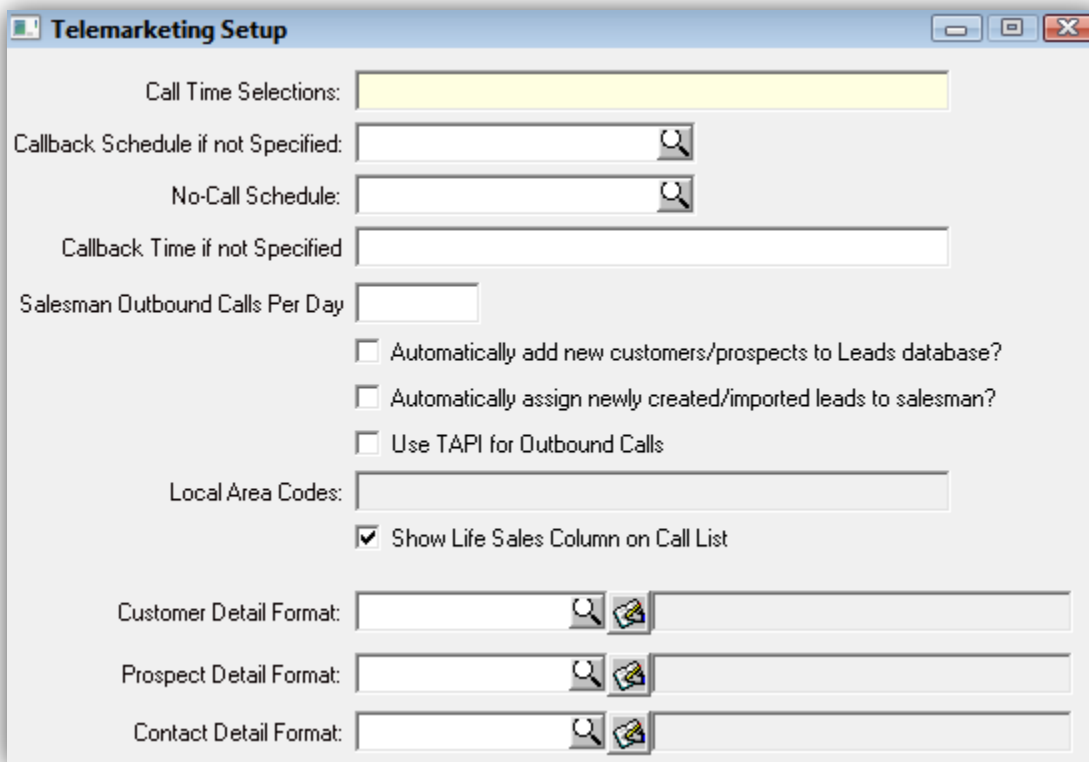
- ❖ **Call Time Selections:** determines the "preferred times" checkboxes available on the "Call Preferences" dialog used in the "Today's Call List" screen. SEE BELOW FOR MORE DETAILS.
- ❖ **Callback Schedule if not Specified:** the default callback schedule for new leads, if not specified using the SCHEDULE keyword in the LEAD import script in the Telemarketing Manager.
- ❖ **No-Call Schedule:** the interval to use when the "Do Not Call" button is clicked in the Call Manager.

- ❖ **Callback Time if not specified:** default call time used for new leads, if not specified using the TIMEPREF keyword in the LEAD import script in the Telemarketing Manager.
- ❖ **Salesman Outbound Calls per Day:** default for new salesman, can be overridden in the Lead Distribution section of the Telemarketing Manager.
- ❖ **Use TAPI for Outbound Calls** – determines whether the "Auto Dial" button is available in the Call manager. Check this if you phone system is TAPI enabled.
- ❖ **Local Area Codes:** used by some phone systems to determine whether a "1" should be dialed before certain numbers. In most cases, long distance codes are managed in the phone system's TAPI setup, or within the regional settings of the Windows operating system.
- ❖ **Show Life Sales Column on Call List** – Display the Lifetime # of orders on the Today's Call List View
- ❖ **Detail format** – *SEE PG.6 BELOW FOR MORE INFORMATION*.

Call Time Selections

Call Time selections determine which call time options are available when choosing a customer's preferred call times. It is important to note the call time selections are based on <u>military time</u>.

Call Time Selections: | 0800-0900, 0900-1100, 1100-1300,1300-1600

Interval Setup

Menu Path: Add-Ons / Telemarketing / Define Callback Intervals
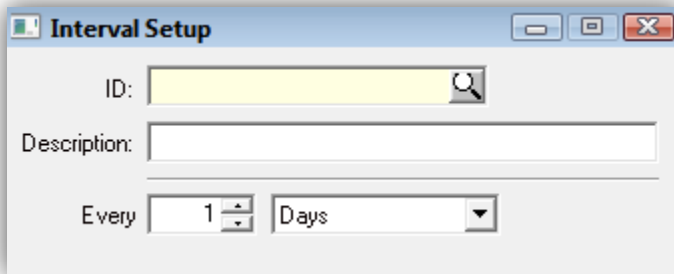
Intervals are used in the Call Manager and for setting defaults in Telemarketing Setup and in the Lead Import scripting of the Telemarketing Manager.

Follow the steps listed below to create a callback interval

1. Create a Unique ID & Description
2. Choose a value for the "Every" field
3. Then choose from the dropdown if the number specified is for days, weeks, months, or years

Detail Format

The customer, prospect, and contact format sections control the layout of the details pane of the Todays call list view.

Each record type (Prospect, customer, and contact) can be displayed differently. Each is controlled by the details section of telemarketing setup.
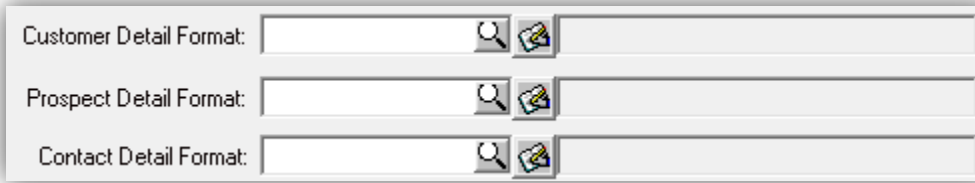
You will need to setup an expression for each to display the information differently. To do this you will need to use the Response Expression editor (File / Supervisor Options / Expression Editor). Follow the steps, and example below to setup your own details expressions for the details pane.

The details pane uses some HTML coding elements like
 (Return Character) and <a href=> (Link). If you are not familiar with these use the examples found below. For additional support writing the Details expressions contact Support@colinear.com

1. Open the Expression Editor (File / Supervisor Options / Expression Editor)
2. Enter an ID for the Expression. (In this example we will make one for customers)
3. Enter a description for the Expression
4. Enter in the Expression code as you want it to appear in the details pane.

   a. Download this expression here

You will notice the in the first row the…

 Customer Name: {trim(syscust.first_name)} {trim(syscust.last_name)}
. This follows the same format for HTML web link coding Actual link text. When you see this in the expression it creates a link in the details pane that actually opens a separate view in Response when clicked. By supplying the Customer ID Response knows to automatically open the view with the correct customer in focus.
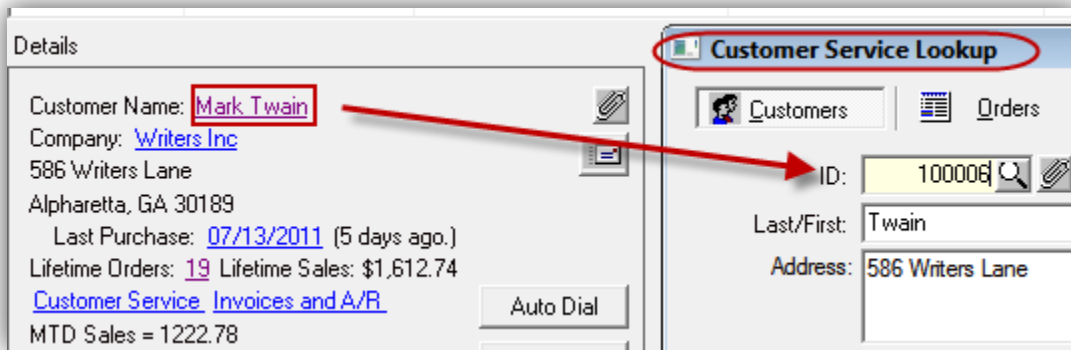
There are many links that can be created in the details pane to access information about a customer, prospect, or contact quickly. See all the possible links below, and what parameter (i.e Customer ID, prospect ID, Contact ID, etc.)must be supplied to each.

Details functions List
Below is a list of functions that can be used in the Details Expressions to quickly pull up other view with customer, prospect, or contact information.

- ❖ SHOWORDER: (ORDER NO)
- ❖ SHOWINVOICES: (CUSTOMER ID)
- ❖ SHOWORDERS: (CUSTOMER ID)
- ❖ SHOWCUSTOMER: (CUSTOMER ID)
- ❖ SHOWPROSPECT: (PROSPECT ID)
- ❖ SHOWCONTACT: (CONTACT ID)
- ❖ SHOWVENDOR: (VENDOR ID)
- ❖ VENDORPOS: (VENDOR ID – PURCHASE ORDERS FOR VENDOR)
- ❖ NEWORDER: (CUSTOMER ID – NEW ORDER FOR CUSTOMER)
- ❖ NEWORDERPROSPECT: (PROSPECT ID – NEW ORDER FOR PROSPECT)
- ❖ NEWORDERCONTACT: (CONTACT ID – NEW ORDER FOR CONTACT)
- ❖ NEWORDERPHONE: (PHONE NUMBER – NEW ORDER FOR PHONE NUMBER)

Telemarketing Manager

Menu Path: Add-Ons / Telemarketing / Telemarketing Manager
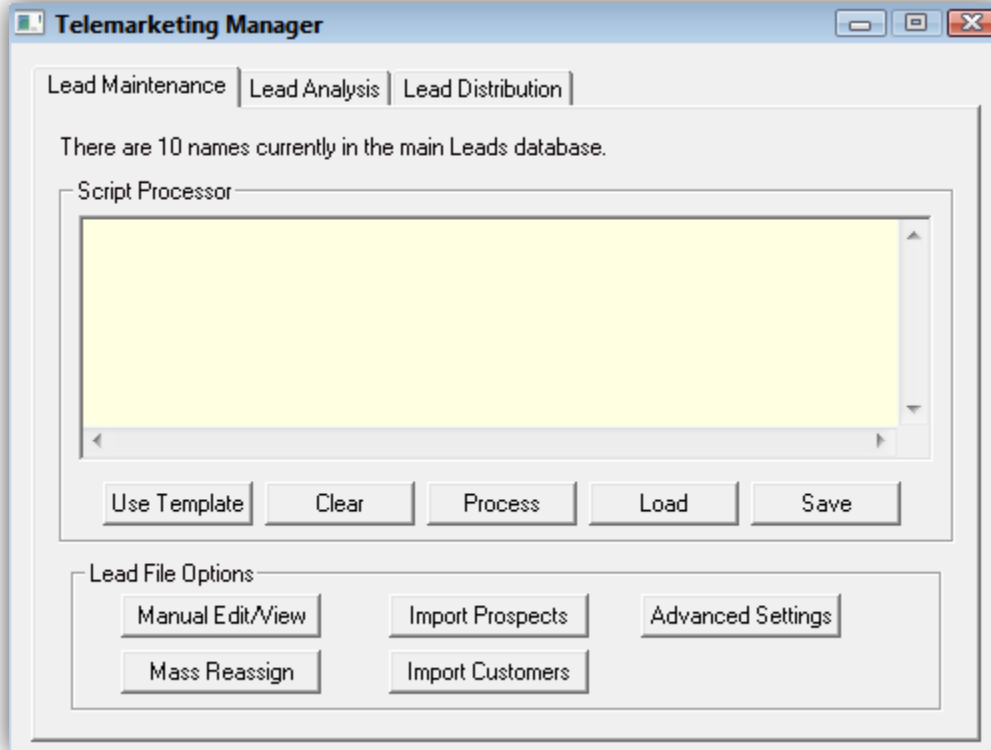
The Telemarketing Manager is used to populate your leads database, analyze your current leads, and then assign leads to your salesman for calling. Find out more information about each process below.

Lead Maintenance

This view is used to populate your leads database. You will use a special scripting language to populate the LEADS table.

Script Processor

The Script processor can be used to load customers, prospects, and contacts into the leads database for follow up. By using a special Scripting language and SQL select statements, insert new leads records into your database. The script syntax is as follows. Once the script is ready click the process button to run the script.

[CUSTOMER|PROSPECT] ADD
[TYPE ….(specify any type – doesn't have to exist yet)]
[TIMEPREF… (specify in military time any time range(s)]
[CALLDAYS… (specify ALL, WEEKDAYS, WEEKENDS, or any 3-char day name(s)]
[SCHEDULE… (specify an existing INTERVAL ID code)]
SQL SELECT [customer_id|prospect_id] from [syscust|mastpros] where…

Example Scripts

Ex. 1

//michigan restaurants, time pref 9-11:30, M-F, 2-5, evey 6 months

PROSPECT ADD

TYPE MI_REST

TIMEPREF 900-1130,1400-1700

CALLDAYS WEEKDAYS

SCHEDULE 6MONTHS

SQL Select prospect_id from mastpros where state = 'MI' and PROSP_TYPE_ID = 'RESTAURANT'

```
//michigan restaurants, time pref 9-11:30, M-F, 2-5, evey 6 months
PROSPECT ADD
TYPE MI_REST  Sets the lead type
TIMEPREF 900-1130,1400-1700  Sets the preferred call times
CALLDAYS WEEKDAYS  Sets the preferred call days
SCHEDULE 6MONTHS   Sets the call back interval
SQL Select prospect_id from mastpros where state = 'MI' and PROSP_TYPE_ID = 'RE
```
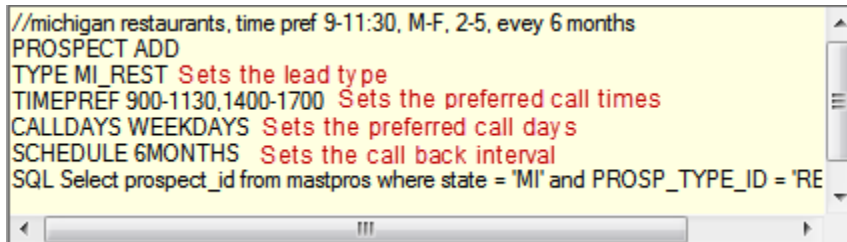
Ex. 2

//ohio grocers, time pref 10pm – midnight, only on Wed or Fri, call once per year

PROSPECT ADD

TYPE OH_GROCER

TIMEPREF 2200-2400

CALLDAYS WED,FRI

SCHEDULE 1YEAR

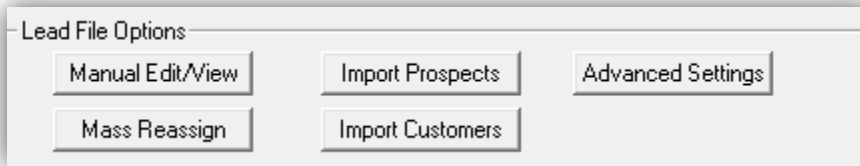SQL Select prospect_id from mastpros where state = 'OH' and PROSP_TYPE_ID = 'GROCER'
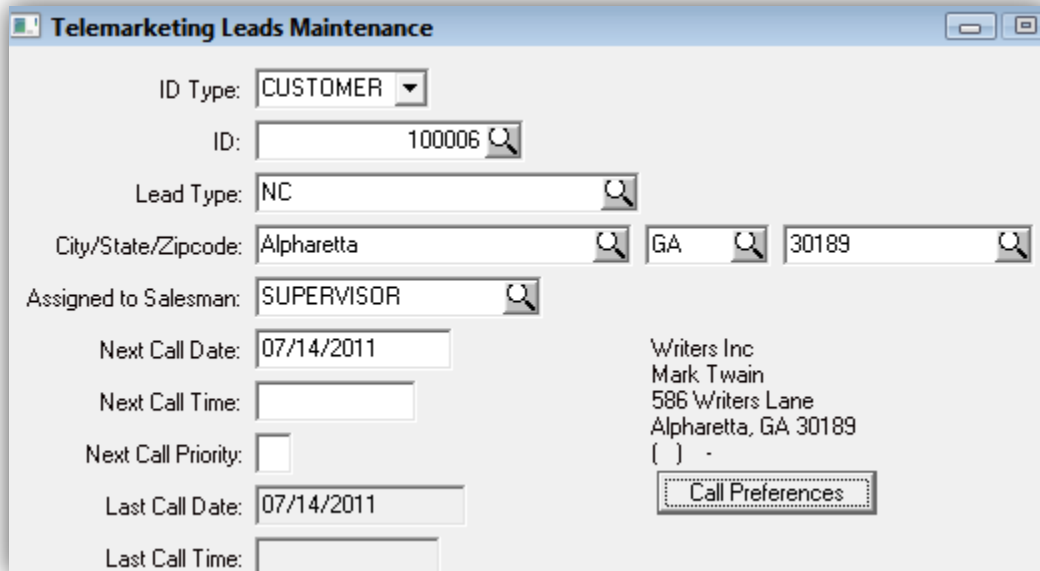
BUTTONS
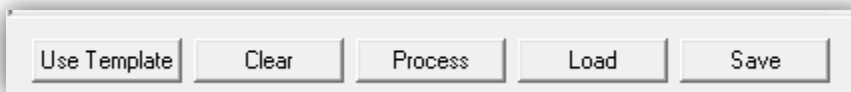
- ❖ **Use Template:** Load a default script template for inserting leads
- ❖ **Clear:** Clears the current text from the scripting view
- ❖ **Process:** Runs the script currently in view
- ❖ **Load:** Load a script that has previously been saved
- ❖ **Save:** Save the current script in view for later use

Lead File Options

```
Lead File Options
  [ Manual Edit/View ]   [ Import Prospects ]   [ Advanced Settings ]
  [ Mass Reassign ]      [ Import Customers ]
```

❖ **Manual Edit/View:** Opens the Telemarketing Leads Maintenance view. From here you can edit each lead record individually.

Telemarketing Leads Maintenance

ID Type: CUSTOMER ▼
ID: 100006
Lead Type: NC
City/State/Zipcode: Alpharetta   GA   30189
Assigned to Salesman: SUPERVISOR
Next Call Date: 07/14/2011
Next Call Time:
Next Call Priority:
Last Call Date: 07/14/2011
Last Call Time:

Writers Inc
Mark Twain
586 Writers Lane
Alpharetta, GA 30189
( ) -
[Call Preferences]

❖ **Mass Reassign:** Opens the Lead Reassignment View. From here you can reassign all of one salesman's leads to another.

Lead Reassignment

Reassign leads from:
to:
[Reassign] [Close]
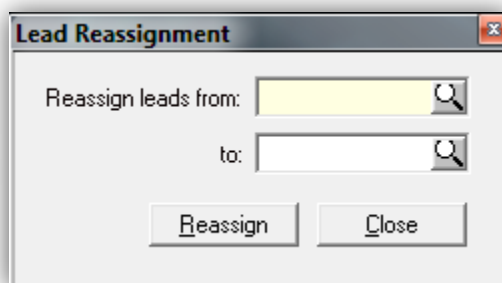
❖ **Import Prospects:** Opens the prospect import utility. For more information on importing data such as prospects into Response, see our Import Documentation.

❖ **Import Customers:** Opens the customer import utility. For more information on importing data such as prospects into Response, see our Import Documentation.

❖ **Advanced Settings:** Opens the Telemarketing Setup menu seen above on pg.2

Lead Analysis

This screen shows the disposition of certain records in the main LEADS database.
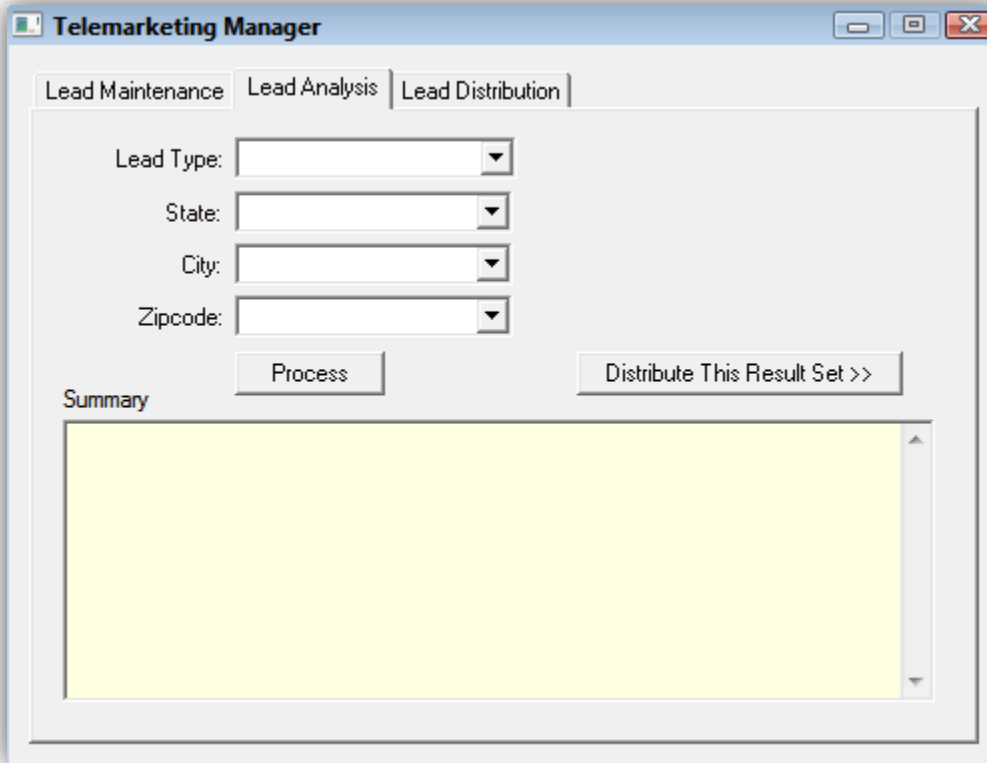
- ❖ **Lead Type:** Dropdown choices populated by the unique customer types in the LEADS database. Will constrain the result set to this lead type.
- ❖ **State** – Dropdown populated by the unique state records in the LEADSdatabase. Limits the result set to only this state.
- ❖ **City** – Dropdown populated by the unique city records in the LEADS database. Limits the result set to only this city.
- ❖ **Zipcode** – Dropdown choices populated by the unique zipcode records in the LEADS database. Limits the result set to only this zipcode.
- ❖ **Process Button:** Clicking the "Process" button analyzes the leads within the selected criteria and displays the disposition of those leads. # distributed, # called, and # available for distribution.
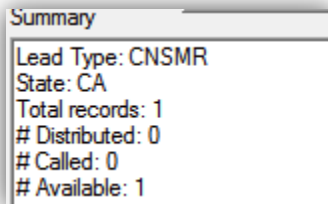
❖ **Distribute This Result Set button:** Clicking the "Distribute This Result Set" will bring up the "lead distribution" screen for purposes of distributing the available leads from the result set. **SEE BELOW FOR MORE DETAILS.**

Lead Distribution

This screen manages the distribution of leads to different salesmen. Clicking a salesman from the bottom list will default the recommended settings for the distribution options.
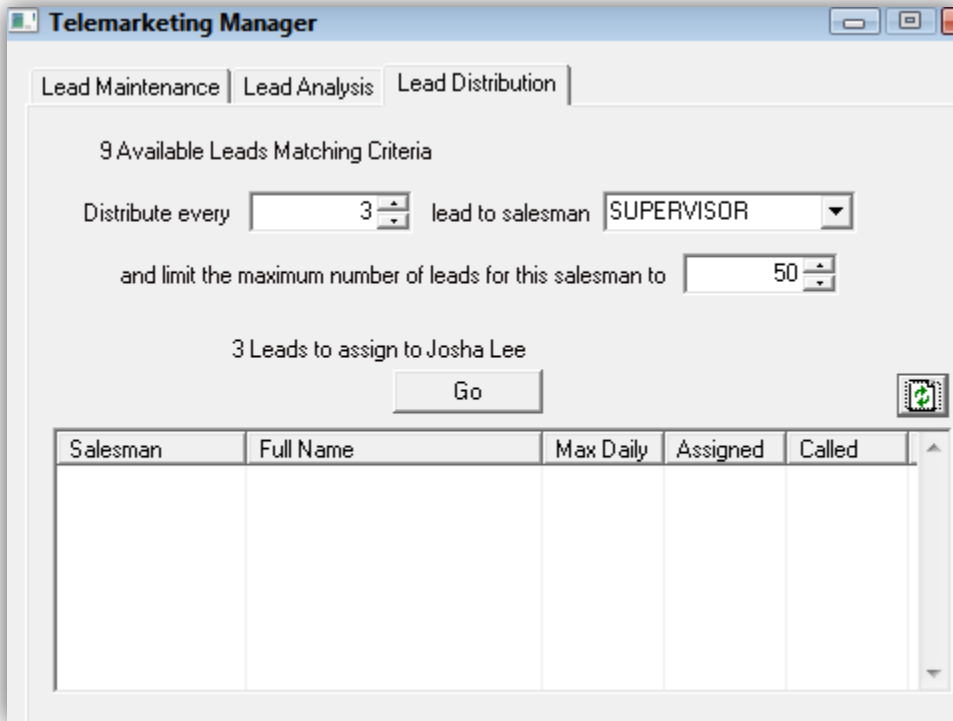
1. Select the number of leads to distribute.
2. Select a Salesman to assign the leads to.
3. Set the maximum number of leads that can be assigned to a single salesman
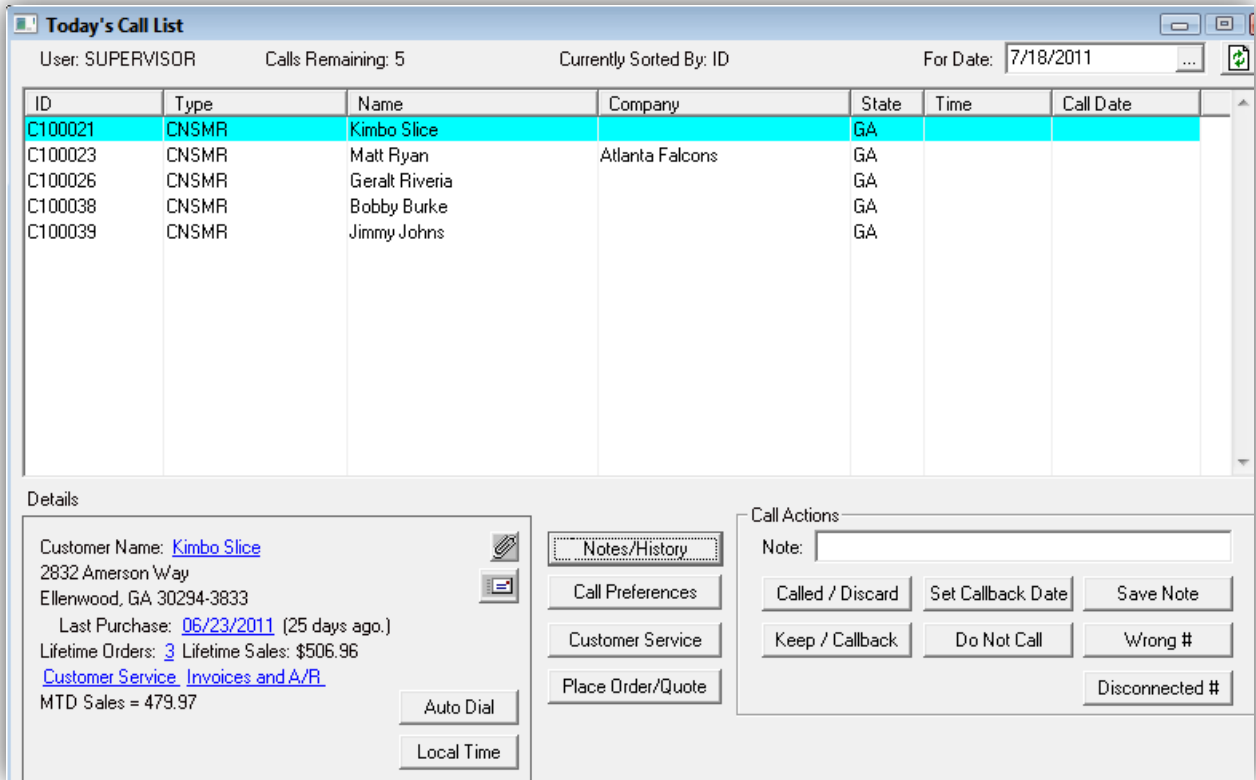4. Click the Go button to assign these leads to the salesman.

Repeat the above process till you have no more leads to assign
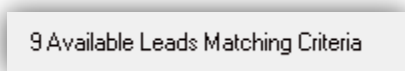
Today's Call List

Menu Path: File / Telemarketing / Today's Call List

The Today's Call List view shows all of the leads that need to be called for the user who is logged in, and by what date is chosen. Leads who are assigned to who is currently logged in, and has a call back date matching the "For Date" selection will be shown.

General information about each customer can be seen in the Grid view.

The details pane at the bottom shows additional information that is determined by the details Expression you previously setup (See pg.4-6).

❖ **Auto Dial:** uses TAPI to dial the currently selected Lead. (**REQUIRES TAPI INTERFACE**)
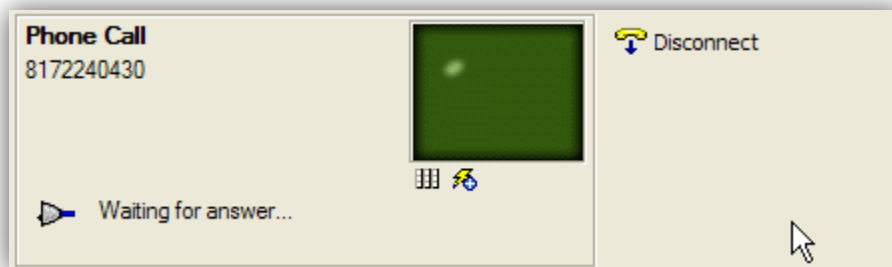
❖ **Local Time:** uses web service to show the local time for the current Lead (using Zipcode). Will also let you know based on preferred call back times if this customer can be called at the current time.
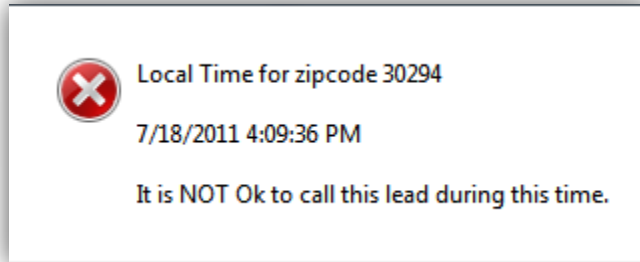
❖ **Notes/History:** Opens the Customer Activity for the current Customer/Prospect selected.
❖ **Call Preferences:** Opens the callback preferences for the current customer selected.
❖ **Customer Service:** Opens the customer service window and pre-populated the window with the current customer selected.
❖ **Place Order/Quote:** Opens Order Entry with pre-populated customer information based on the customer selected from the Today's Call list view.

Call Actions

❖ Called / Discard
  ✳ Updates the lead next call date using today's date plus the interval stored with the lead (MONTHLY)
  ✳ Sets the lead last_call_date to today
  ✳ If the lead is a customer, retains the salesman
  ✳ If the lead is NOT a customer, returns to lead pool (removes salesman)
  ✳ Note saved for lead as entered (or if not entered, logs "All set.")
❖ Set Callback Date
  ✳ Prompts for callback date / time
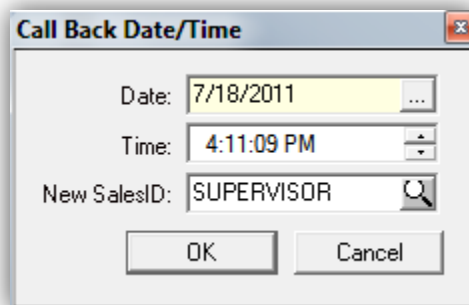
  ✳ if note entered, logs the note
  ✳ if no note entered, saves note as "Manually set callback date/time to <date> @ <time>"
  ✳ sets the lead next call date to what was manually selected
  ✳ sets the lead next call time to what was manually entered

- ✴ (does NOT set lead last_call_date and probably should)
- ❖ Save Note
  - ✴ Saves a note in the activity log
  - ✴ Does not update leads record
- ❖ Keep / Callback
  - ✴ Prompts for callback date / time
  - ✴ if note entered, logs the note
  - ✴ if no note entered, saves note as "Keeping/ working this lead. Manuallys et callback date/time to <date> @ <time>"
  - ✴ sets the lead next call date to what was manually selected
  - ✴ sets the lead next call time to what was manually entered
  - ✴ (does NOT set lead last_call_date and should)
- ❖ Do Not Call
  - ✴ Sets the lead last call date to today
  - ✴ Sets the lead next call date to todays date plus the interval defined in setup for "no call"
  - ✴ If the lead is a customer, retains the salesman
  - ✴ If the lead is not a customer, removes the salesman
  - ✴ Logs a note "do not call!"
- ❖ Wrong #
  - ✴ Warning displays saying lead will be removed if they continue
  - ✴ Logs note if note entered
  - ✴ If no note entered, logs "wrong number!"
  - ✴ Lead record is deleted
- ❖ Disconnected #
  - ✴ Warning displays saying lead will be removed if they continue
  - ✴ Logs note if note entered
  - ✴ If no note entered, logs "number disconnected!"
  - ✴ Lead record is deleted

TECH: Document modification history

❖ 07/18/2011: Document Recreated (Replaced Telemarketing.doc)