

## Outbound Telemarketing

**PROGRAM NAME:** TMMAIN

**MENU OPTION TITLE:** Outbound Telemarketing

**MAIN MODULE:** TELEMARKETING

**HELP KEY ACTIVE:** YES

### PROGRAM OVERVIEW

This program is one of the most powerful in all the IBS Software System. As the program starts, it will open many other databases throughout the software to give you access to massive amounts of data. You have the ability to create, track, and complete all company services for the customer. For a detailed description of all the fields in the customer view screen, refer to the documentation in {CMMMAINT}.

All information regarding customers is available in this area of the software. All previous and current information can be quickly accessed to speed information retrieval and better serve your customer base. Not only will your customers spend less time on the phone trying to get answers from you, but will feel like they are important because you will be able to service their requests without having to refer them to another person within the company.

One of the great parts of this system is the ability to reschedule the customer and call them back when you told them you would. This shows the customer that you remembered to return their call at the appropriate time. This can be very important for special promotions or follow-up of customer requests. **YOUR ACCURACY ON CALLBACKS WILL NOT ONLY IMPROVE YOUR RAPPORT WITH THAT CUSTOMER, BUT CAN EVEN INCREASE SALES!!**

Managers can enter notes to be viewed daily for constant company updates. This improves communication between supervisor and sales staff and eliminates serious confusion.

There is also an <F7> options menu within this program. This menu will have many options for quick and easy information retrieval and data manipulation. With all of this power at your fingertips, you now become the only link necessary between the customer and the company. When the customer calls in, you are now the only person they should need to speak with. This will give you the edge in settling disputes that may have arisen out of normal everyday activity.

### PROGRAM OPERATION

**Please enter your REP CODE:** Type in your unique REP CODE. This must be a valid code or a message will appear at the bottom of the screen "**REP CODE NOT FOUND - PLEASE REENTER**". After typing in the valid code press <ENTER>.

**Please verify today's date:** After you enter your own rep code, you will be asked to confirm today's date. You will normally hit return past the date unless either of the following conditions exist:

1) The date is incorrect: Type in the correct date and notify the systems manager of the condition.

2) You need to backdate an order: Type in the date you want to go on that order. Then, process THAT order only and exit the system. Once you enter a date, if you do not change it, every order you process will have that date. IF YOU BACKDATE AN ORDER, YOU MUST EXIT THE SYSTEM AFTER YOU PROCESS THAT ORDER!

**CONSUMER CONTROL CENTER:** IT IS HIGHLY RECOMMENDED THAT YOU READ THE MANAGERS NOTES EACH TIME YOU LOGIN. They will advise you of all current conditions that your supervisor thinks you should be aware of.

**SCHEDULED CALLS CONTROL SYSTEM:** Throughout the entire program, there are function keys available to help with the everyday tasks telemarketer's are going to need. To determine what keys are available in the program, press <F1>. This will display a pop-up window at the bottom of the screen that lists any function keys available. You will have different options at different places in the program. This pop-up window will show you what keys are active in any particular location of the program. The <F7> key is probably the most powerful of all the option keys you will use.

You now have access to any customer and any information pertaining to that customer. You also have access to any inventory information, any Return Merchandise information, and any shipping information.

Check this screen to make sure you have no past due calls or calls you currently need to make. You can select the customer you want to call by highlighting that customer and then pressing <ENTER>. The screen will change and you will be able to view the customers {TMENTRY} screen.

Every customer that calls in and/or purchases something from you needs a Customer ID. This ID is referred to as their <CUST ID>. This is how all customer information is stored. Since you have complete access to create a new customer, it is important to know how customer IDs are determined for your company. You should identify this with your supervisor before creating any new customers. Please refer the manual on creating new customers called <CMMAINT> before adding new customers if you are not sure of the recommended procedure.

**<F7> OPTIONS MENU:** This key activates a pop-up window that lets you have access to other software programs without having to exit the program you are currently in. For example, you could be processing an order and have a customer call in to find out about an inventory item's status, or check on an existing order already in the system. Just press the <F7> key to access the program you need. When done, just press the <ESC> key until you get back to where you were.

**<F8> UNSCHEDULED CALLS CONTROL SYSTEM:** To view a list of any or all customers in the system, while still at the scheduled calls screen, press the <F8> key to go to the Unscheduled calls screen.

**Enter Rep Code to search for:** The name of the rep that is logged in to the system will automatically be inserted into the rep code field. If you want to view customers for

that rep press <ENTER>. To blank out the rep name, hit the <BACKSPACE> key to blank the field. Now you can view all customers in the system or by typing in any other valid rep code you can view their customers. Use your rep code to find your customers or someone else's rep code to find their customers.

**Enter State to search for:** Enter the state the customer lives in to define the size of your list by state or leave blank to view all customers for the specified sales rep.

**Print in <A>lphabetical, or <Y>ear to date shipping order:** By typing <A> you will see the list of customers alphabetically.

**ENTER A STARTING SEARCH NAME:** Enter a beginning letter of the customer to find the beginning of the list or type in the customers complete name and that name will be the first name displayed or leave blank to see the list from the beginning of the list. By typing <Y> the list will display by Year to Date sales history, Highest to Lowest.

Select the customer to view by highlighting and pressing <ENTER>.

**CUSTOMER NOTES SYSTEM:** This screen gives you information on the customer you selected.

**Entering TMNOTES:** Once you have entered into a customer's information screen, you can now access the notes for that customer. The IBS software supports two keys for notes entry, <F6> and <F8>. There are two major differences between the two. When using <F6>, if the customer was flagged as an "S" in <CUST PROFILE>, you will have to enter a valid recall date before you can exit the notes area. This will also track phone time automatically.

Remember: Only customers flagged as "S" in <CUST PROFILE> will be able to be set up as recall scheduling.

By pressing the <F8> key, you can view existing notes and/or enter additional notes for that customer. When finished simply press the <ESC> key to exit the notes area.

NOTE: If you hear a beep when you press <F8>, don't be alarmed as it is telling you there are no previous notes entered in as of yet. An error message does display at the bottom of the screen.

To enter notes for the customer using <F6>, simply type in a valid <NOTE CODE> and press enter. If you don't know the valid note codes, you can use the <PAGE-UP/PAGE-DOWN> keys to find the appropriate note code or type in the valid code to use and press <ENTER>. You can type in any notes you need for future reference, pertaining to the customer. Keep in mind that when you get to the end of a line you must press <ENTER> to go to the next line. The cursor will fall into the note code field after every line of text and you must enter in the proper note code before you can continue typing in new text. Follow this same procedure for each line you need to type in. When you've finished typing in the notes, press <ENTER> twice to get to the bottom of the screen. You now have an option to add, edit, delete, see more, prioritize or quit the notes. Press <ESC> and you will be asked to enter the next call date. Type in a valid date, press <ENTER>, then type in whether you want your next call

<A> for AM or <P> for PM. The notes will be saved for future reference. This window will also show any previously scheduled call dates, and all previous customer notes. You can view old notes by using the <PAGE-UP/PAGE DOWN> key to scroll, but you can not be in notes entry when doing this.

When you press <ENTER> you will be taken back to the Scheduled calls screen to choose the next call to make. Pressing <ESC> will exit the TM system.