

Button Explanations

The screenshot shows the 'Wireless Marketing Wizard' v4.4.4.5 interface. The main window is titled 'Account Call Schedule' and contains a list of account call entries. The interface is annotated with red arrows pointing to various buttons and fields, each with a corresponding text label explaining its function.

Buttons and Fields:

- Clear:** Clear entries in fields
- Last:** Recalls the last lookup
- Recall:** Account select list
- Open Inactive Account:** Choose an Archived Account to Open
- Print This Unit:** Print the current unit
- Database Menu:** Create Lead Lists with Selection Options for Lookups
- Open Lead List:** Select a List to Open; It will then appear here
- Run Account Group:** Group Account Lookup Settings
- Setup:** Set Logins; set Repair & Wizard or Wizard Only
- Main Menu:** Set Network Storage Path, See Machine ID & Account ID, etc.
- EWAVE, PreCash, ONE, All Units:** Lookup One, Lookup All with Proposals
- Indirect, FDT, SNAP, ETK, Cleanup, SF.com:** Set Logins; set Repair & Wizard or Wizard Only

Fields:

- Phone Number:** PTN/MDN
- Account Number:** BAN
- To Post Payments:** SIM/Serial, Direct, Last Name, Zip Code
- Amount:** Amount
- Agent ID:** <Select Name>
- Equipment Prices:** Table with columns: Model, Equipment, Prices, Adjust

Text Labels:

- ISC Site Login
- Login for FDT
- Login for SNAP
- E Ticket - Repairs
- Archives old lookups
- Sales Force

Form Elements:

- Verify Agent
- Account Unit Qty:
- Display Text Worksheets
- Auto Set
- Enable Call Back Schedule
- List Accounts by Agent Name
- Source List Count: 0

Unit Lookups – Wizard Screen

Two fields of data from an account are required for the Wizard to perform lookups. An account with more than one unit is best so you can see the Wizard extract data for all account units.

Only 2 of the 4 fields are required, just as in the account search screen on the INC website that you are familiar with. For example, you may enter just the PTN and Account numbers.

If the Direct Connect field is used, enter: ** (two asterisks)

In the Upgrade Defaults section, enter the model number and price for a phone that you often upgrade customers to. This will allow the Wizard to pre-populate \$150 rebate-eligible units with the model number and price information. This will enable the calculation of the final upgrade cost for your customers. Use a negative number in the Adjust fields to give an additional discount.

Click the yellow All Units. The Wizard will perform a lookup for the first unit and extract the quantity of units on the account.

If there are more than 10 units on this account, a dialog box will allow you to set how many units to look up. It may also allow you to select certain area codes.

Clean-Up Account Call Schedule

The Account Call Schedule should only contain proposals that you are currently working on. It should *not be used* to track customers, nor to keep recalling them over an extended period. Under 30 days is the life of a proposal.

Click here to archive dated proposals. They will remain available for rebates.com proof of eligibility.

The screenshot shows the 'Wireless Marketing Wizard' software interface. On the left, there are fields for account information: PTN/MDN (5617199922), BAN (343382222), SIM/Serial (000810930339310), Direct (159*220929*13), Last Name, and Zip Code (32819). Below these are buttons for 'EWAVE', 'ONE', and 'All Units'. The 'Agent ID' is set to '<Select Name>'. Under 'Upgrade Defaults', there are options for 'Full Upgrade' and '1yr. Upgrade' with a 'Save' button. At the bottom left are buttons for 'Wizard Help', 'View Rebate Mailer', 'Setup', and 'Main Menu'. The main area displays a list of proposals with columns for 'Call Date - Time - Account Name'. The list includes: '02/19/2009-01:51P- GILL INDUSTRIES 7 AC423 of 110.xls', '02/19/2009-02:55P- GILL INDUSTRIES 110 PK.xls', '03/04/2009-01:35P- GILL INDUSTRIES 110.xls', and '10/23/2008-04:09P- ADAM_SOCARDA_4.xls'. A red dotted circle highlights the first three entries. Below the list is a 'Lead List Name' field containing '5617199946_159*229229*13_343384929_MARIAJOSE HIDALGO_MARI'. At the bottom right are buttons for 'Indirect', 'FDT', 'SNAP', 'ETK', 'Cleanup', and 'SF.com'. A red arrow points to the 'Cleanup' button. On the right side of the interface, there is a calendar for March 2009, a clock showing 1:35 PM, and buttons for 'Database Menu' and 'Open Lead List'. A 'Run Account Group' button is at the bottom right.

Before you Generate New Lead lists from the Database Menu, you should be sure your Account Call Schedule is cleaned up.

Dated Lead Lists will be renewed when you use the Database Menu to Generate New Lead Lists. The same accounts will come back as new leads.

If there are proposals that have not been used in over 30 days, click on the 'Cleanup' button to automatically send them to the Inactive Folder.

Generate Lead List

Click: Get This Window >

< New Lead List Goes Here

To Lookup an Account Group Click Here

Make Selections then Click Generate List

< Make Selections then Click Locate Accounts

Database Menu

Choose Network

Set Date Range. Click on the Red Circle to use today's date in either calendar.

Use this initially to import leads from your existing Point-of-Sale software or any other source of data.

Wireless Marketing Wizard - Database Menu

Create Lead Lists

Wizard Menu

Generate Eligibility Lists and go to the Wizard Menu to Analyze Accounts and Generate Spreadsheet Proposals.

Inter-Store Remote Upload

Select Network

IDEN/CDMA CDMA ACDMA VCDMA GSM

Select Search Functions

Contract End Date One Year Old Two Years Old 150 Rebate Date

Rebate Extract History

Direct Mail Unit Quantity Rebate Update

Period Select

Start Date 150 Rebate Stop Date

February, 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6
7	8	9	10	11	12	13

Today: 3/16/2009

March, 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Today: 3/16/2009

Skip Accounts that have a Wizard Sheet generated within the last: 0 Days

Populate Database Resubmit List Count DB DB Maintenance

Close Help Generate List

Use this to skip a repeat of recent lookups. Click the up-down arrows to select whole months, or just enter a number.

Click here after all options are chosen.

Click on Generate List to Continue

After Database Menu

Details of highlighted List.

Agent ID choice controls which set of Proposals will show in the Account Call Schedule window.

Wizard Account / Rebate Lookup

Account Unit Qty:

PTN/MDN: 4232731333

BAN: 567719999

SIM/Serial: 000823594121310

Direct: 168*166963*8

Last Name:

Zip Code: 49525

Agent ID: <Select Name>

Upgrade Defaults: IDEN CDMA

Full Upgrade	Equipment	Prices	Adjust
Model: i860		150.00	
Model: i570		269.99	
Model: i335		229.99	

1yr. Upgrade: Save

Wizard Help View Rebate Mailer

Setup Add / Edit Employee Names

Main Menu <<< 4 >>> EXIT

Account Call Schedule

Call Date - Time - Account Name

- 02/19/2009-01:51P- GILL_INDUSTRIES_7_AC423_of_110.xls
- 02/19/2009-02:55P- GILL_INDUSTRIES_110_PK.xls
- 03/04/2009-01:35P- GILL_INDUSTRIES_110.xls
- 10/23/2008-04:00P- ADAM_SOCARDA_4.xls

Open Inactive Account

Display Text Worksheets

PTN: 423-273-1423 Model: I530BR

UNITS: 110

Account Type: Corporate/Agnts

Contract Co-op Dir Dist Frnchse Etc

Contract Start: 2007:03:06

Billing Name: GILL INDUSTRIES

Contact Name:

Contract END: 2009:03:05

City: GRAND RAPIDS, MI

Network: iDEN Fax# Not Available

AcclD: 567713513

Status: Good Standing

Home Phone: 6165592700

150 Rebate Date: Eligible

Last Ran Sheet on: 2009-02-19

List Accounts by Agent Name

Database Menu

Open Lead List

Automatic Logins - List Cleanup - SF.com

Indirect FDT SNAP ETK Cleanup SF.com

Lead List Name: 03 16 2009 Rebate Dates 2009 03 16 to 2009 04 15 iDEN CDMA

4232731423_148*162923*4_567713513_GILL INDUSTRIES_CHRIS	6168892760_130*35*50005_567713513_GILL INDUSTRIES_CHRIS	6168894199_130*35*35514_567713513_GILL INDUSTRIES_CHRIS	6168930259_130*15*120_567713513_GILL INDUSTRIES_CHRISTIN
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Source List Count: 9

Account Unit Qty: 110

Close List Run Account Group

Highlight a line then click on Open Selected Worksheet to see the Proposal Spreadsheet. (the button will appear at the top)

Newly Generated Lead Lists reside here. A highlighted List will display details in the right side window.

Click here to Lookup a Group of Accounts. There are five options groups for fine tuning your selection

View Proposals

The screenshot shows the 'Wireless Marketing Wizard' v4.4.4.5 interface. On the left, there's a 'Wizard Account / Rebate Lookup' section with fields for PTN/MDN (5617199922), BAN (343382222), SIM/Serial (000810930339310), Direct (159*220929*13), and Zip Code (32819). Below this are 'Agent ID' and 'Upgrade Defaults' options. The main area contains a table of call records:

Call Date	Time	Account Name
02/19/2009	01:51P	GILL INDUSTRIES_7_A0423_of_110.xls
02/19/2009	02:55P	GILL INDUSTRIES_110_PK.xls
03/04/2009	01:35P	GILL INDUSTRIES_110.xls
10/23/2008	04:09P	ADAM_SOCARDA_4.xls

Buttons at the top include 'Open Selected Worksheet' and 'Send to Inactive Folder'. A calendar on the right shows 'March, 2009' with 'Today: 3/16/2009' highlighted. At the bottom, there are buttons for 'Indirect', 'FDT', 'SNAP', 'ETK', 'Cleanup', and 'SF.com', along with a 'Lead List Name' field containing '5617199946_159*229229*13_343384929_MARIAJOSE HIDALGO_MARI'.

Select an Agent to Limit Proposals at right.

Open a Worksheet to display the Proposal.

Old lookups should be archived.

Select an exact date and time to revisit a Proposal

Setup Menu: Wireless Marketing Wizard

Setup Menu - Wireless Marketing Wizard

Login ID's and Passwords

Eticket Repair / Indirect

Indirect Login ID: cc577824
Indirect Password: xxxxxxxx **Test**

DARA Login Data

DARA Login Name: ca062888
DARA Password: xxxxxxxx

Indirect Unified Login (FDT/SNAP)

Login: cc577824 PW: xxxxxxxx

Menu System Controls

Sales / Marketing Wizard
 Repair / Marketing Wizard
 Require Access Password

idenphones.motorola Login Data

Motorola Login: FARRELLJI
Motorola PW: xxxxxxxx **Test**

PreCash Login Data

Password: xxxxxxxx
Login: xxxxxxxx

E-Wave - Alltel Login Data

Login: V014157
Password: xxxxxxxx

Sales Force

Login: _____ PW: _____
UserID: 10brown

FDT / SNAP

FDT: _____ SNAP: _____

Wireless Marketing Wizard

Enable Call Back Time Schedule
 List Accounts by Agent Name

Skip Rebate Check
 Skip Voucher History Search

CellRam License Information


License Days Remaining	111
iDEN Unit / Repair Depot	YES
Repair X-Ref/Voucher Generate	YES
Wizard Communications Link Setting	NO_COM
Your Customer ID	54751

Repair Print Settings

Print Account: Yes No Ask

Report Access Password: _____

Update Company Information

Cancel  **SAVE**

The Wireless

How to Use Proposals

Eligibility Dates for each rebate

Approved Credit Line Count

Eligibility Counts
T1 for \$75 - T2 for \$150

Billing Contact Info

Use Adjust Column to place discounts or extra charges

Unit Quantity

Office Code: Bar Code numbers from rebates.com

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Wireless Marketing Wizard Customer Account Workbook - 3 Proposals for Acc# 55555555															
2																
3	Billing Name: CELL INDUSTRIES				Units: 6				Billing System: ENSEMBLE							
4	Contact Name: Susan Smith				Approved Line Count: 160											
5	Contact phone: 5088883764				Eligibility Counts: T1=0 T2=6				Wizard Run Date: 2011:03:04							
6	Fax Number: Not Available				Type: Corporate/Agnts Cntrctr Co-op Dlr Dist Frchse Etc											
7																
8	Phone No	75 Dt	150 Dt	Upgrade Rebate\$	Equip	SRP	Adjust	Total	Model	Alias	Plan	DC	SIM	Contract End	Office Code	Network
9	6165554199	Jan-09	Eligible	\$150.00	i570	\$269.99		\$119.99	I530BR	Shop Pho	Bus.Essentials Add	130*35*6666	000801411709999 x	Jan-09		iDEN
10	6165554200	Sep-07	Eligible	\$150.00	i570	\$269.99		\$119.99	I730	John Smit	Bus.Essentials Add	130*15*666	000824299999310 x	Sep-07		iDEN
11	6165554201	Jan-09	Eligible	\$150.00	i570	\$269.99		\$119.99	I530	EMPTY	Bus.Essentials Add	666*45*7610	000999968649310 x	Jan-09		iDEN
12	6165554202	Aug-09	Eligible	\$150.00	i570	\$269.99	-\$20.00	\$99.99	I530BR	Karen	Suspend Push to T	130*46*26666	000801411999930 x	Aug-09		iDEN
13	6165554203	Jan-09	Eligible	\$150.00	i570	\$269.99		\$119.99	I560	Paul John	Bus.Essentials Add	130*66*3666	000877771884330 x	Jan-09		iDEN
14	6165554204	Mar-09	Eligible	\$150.00	i570	\$269.99		\$119.99	I530BR	Ricky Lak	Bus.Essentials Add	148*162555*4	000823594777710 x	Mar-09		iDEN
15																
16					\$900.00			\$1,619.94	-\$20.00	\$699.94						
17																
18																
19	Click the link below to view stored unit service details and/or rebate eligibility pages (Click in Column 'B')															
20	Click This Link to Display Services Detail and Rebate Pages															
21																
22	See TABS below to view all 3 proposals															
23																

Cell Number

Click here to display Services Details

Proposal #2 or #3

Upgrade Model

Rebate Amount

Retail Price

Totals Row

Current Model

Models & Prices change when Proposals #2 or #3 are selected

Phone User, Plan Info, DC & SIM
Click Link at cell B20 at the left

Contract End Month - Year

Network

At Sales Floor: Eligibility Lookups

Of the first four fields, only two fields need data in order to lookup an account.

Click on All Units:

After the lookup, a spreadsheet Proposal will be generated. This will lookup all the units related to this PTN.

Wireless Marketing Wizard

Wizard Account / Rebate Lookup

Verify Agent

Account Unit Qty:

PTN/MDN

BAN

SIM/Serial:

Direct

Last Name

Zip Code

Amount

Amount

EWAVE PreCash ONE All Units

See Proposal after Next Page

Repair Wizard Lookups

Of the first four fields, only two fields need data in order to lookup an account.

Click on Lookup

CellRam Action Menu - Repair Automation - Wireless Marketing Wizard v4.4.5.4

iDEN Account Search

PTN

Account ID

SIM

Direct Connect

Unit Search

IMEI Verified? No Skip Unit Search Skip Neg Check

Serial No. Model #

Warranty Expires Reimburse Timer

Click here to run repair functions

AutoTab

Auto Mode