MOMS nTouch Demonstration
24 May 2001 – 10 a.m.

Attendees:

Instead of listing all of the attendees and your username and password, I will just tell you how the login screen is set up. Once you go to the web site listed below, you will be asked to login to the system. Your username is first initial and last name (i.e.- Kris Evans is "kevans" and Terease Baker-Bell is "tbakerbell"). Your password is "password".

Demonstration Flow:

Logging In:

1. Access MOMS test system at http://mms-test.harte-hanks.com

2. Users will be immediately prompted to change their password. Please enter a new password and confirm.

The Administrative Features:

3. Click **BP Admin** on navigation bar at the top of the screen. Then, select the "**Modify User**" feature on the left-side navigation bar.

4. Each participant should update their address, e-mail, phone and fax numbers to the correct information, and submit the changes.

5. Click the "**Add User**" feature on the left-side navigation bar. Choose "**System User/Sales Rep**" from the drop-down box. Each participant should enter a new user into the system, with name, e-mail, address, phone and fax numbers.

6. Click the "**Modify User**" feature again. Please note that each participant now has the ability to modify the User they just entered.

The Leads Features:

7. Click the "**Leads**" application set on the top navigation bar. Once the Leads features appear on the left-side navigation bar, click the "**Add Prospects**" feature.

8. Each participant should add a lead by entering the demographic information and answering the script questions.

9. Once submitted, click the "**View Prospects**" feature. Test the following functionality:

   - **Mark one lead**. Click the **print button** and print the lead details.
   - Click the "**Download to Excel**" button and create an Excel spreadsheet.

- Click the **hyperlinked Contact Name field**. Edit the contact information and submit changes.
- **Mark two leads**. Click the "**Change Priority**" button and upgrade to High Priority.

10. Click the "**Open Leads**" feature. Test the following functionality:

    - Click the "**Priority**" column heading to sort the leads by priority.
    - Click the **circular arrow** for the first lead in the set (You should have no Priority 'P' leads). View the Responses associated with the lead. Click the Feedback tab and update the lead to "**Sale Potential**".
    - Click the checkbox next to another lead. Click the "**Reassign Leads**" button, and reassign the lead to the other sales rep in your group.

11. Click the "**Pending Leads**" feature. Test the following functionality:

    - Click the **circular arrow** for one of the leads in the set (there may only be one). View the Responses associated with the lead. Click the Feedback tab and update the lead to "**Sale**".

12. Click the "**Search Leads**" feature. Test various query parameters within the feature.

13. Click the "**Bulk Upload**" feature. HH will explain how it works.

14. Click the "**Create Campaign**" feature. HH will explain how it works

15. Test various reporting functions.

End of System Demo

Go through the IBM reports that will be generated from this system.

Q&A Session