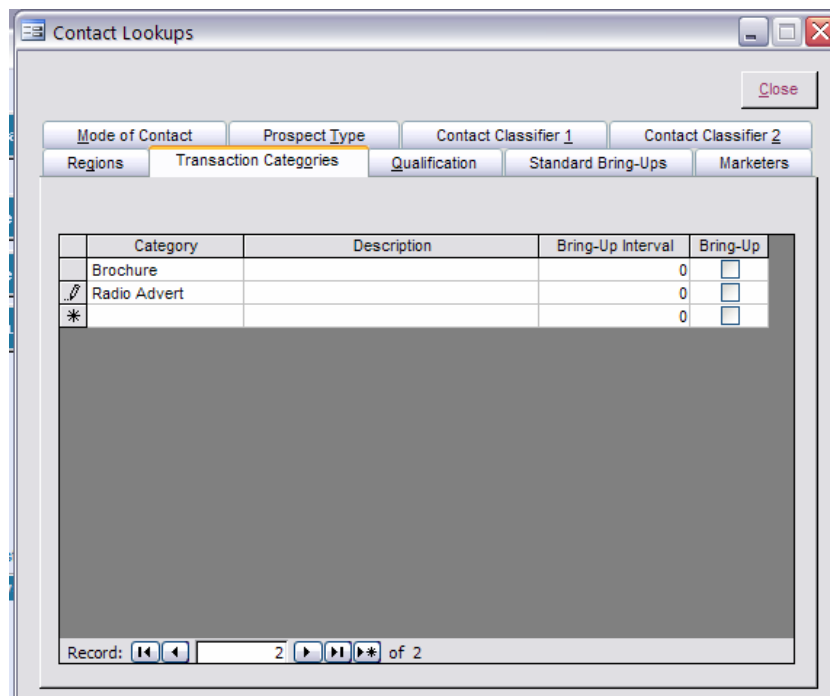


Setting Contact and Transaction Lookup Values

Contact and transaction lookup values are useful for customising your prospect system.

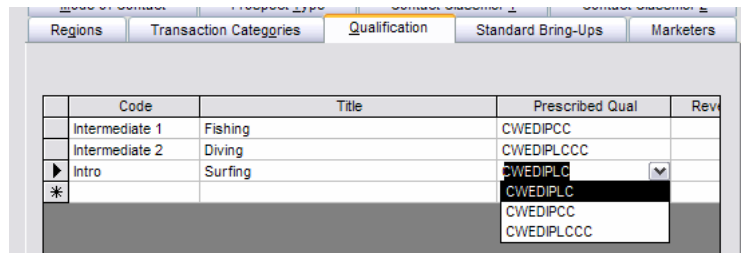
1. Open the Administration Module.
2. Click *System Management*.
3. Click *Contact Lookups*.



There are nine types available:

- *Contact Classifier 1* – A list of recruitment sources that influence prospective students, e.g. “Family”, “Friend”, “Media”, etc.
- *Contact Classifier 2* – A list of advertising or promotional methods used, for example “More FM”, “NZ Herald”, “Career Expo”, etc.
- *Marketers* – Used to specify which persons are marketers, i.e. persons who can be associated with a prospect’s contacts and transactions.
- *Mode of Contact* – Used to classify how a prospect initially contacts your organisation, for example by phone, mail, email, etc.
- *Prospect Type* – Used simply to classify a prospect in a general way, for example as wanting to study full-time or part-time.
- *Qualification* – A list of qualifications or programmes that your organisation offers (or plans to offer). When you add a prospect’s contact record you can note what

qualifications interest the prospect. You can link a qualification here to a prescribed qualification in the curriculum using the *drop down box*.



- *Regions* – Used to classify prospects by their region of origin.
- *Standard Bring-Ups* – Used to classify standard bring-ups.
- *Transaction Categories* – Transaction categories are used to define each transaction between your organisation and a prospect. For example you may have “Standard Letter 1”, “Phone Call”, “Brochure A”, “Follow Up”, etc. A transaction category can be defined as being a “bring-up” and therefore having a default bring-up interval.

Adding a Transaction Lookup Value:

1. **Click** on the empty bottom row of the lookup list.
2. **Type** the code and the name of the new transaction value in the empty bottom row.
3. **Click** close. You can now use your new entry in the contact form in the Main Module.

