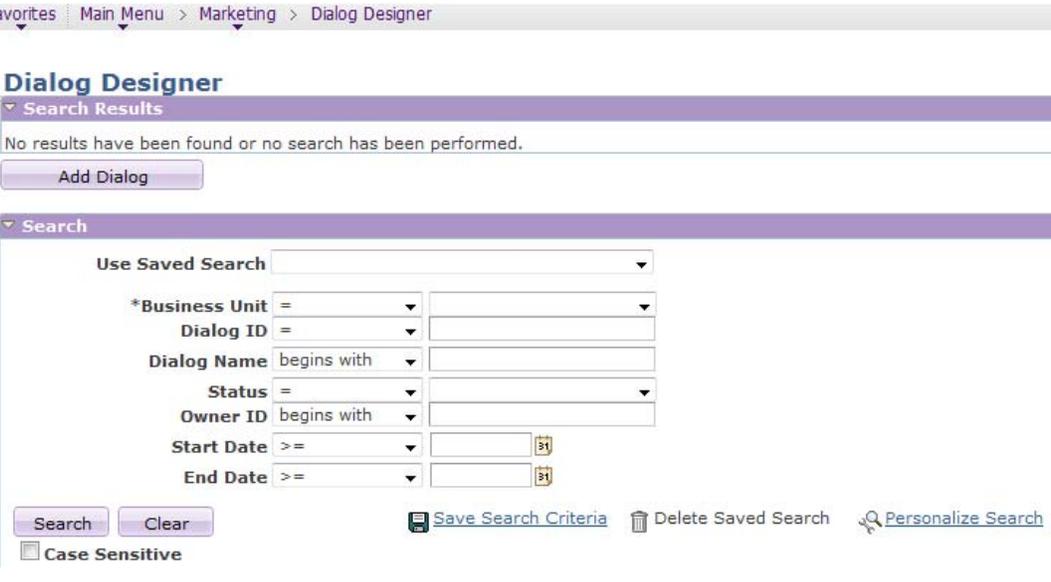


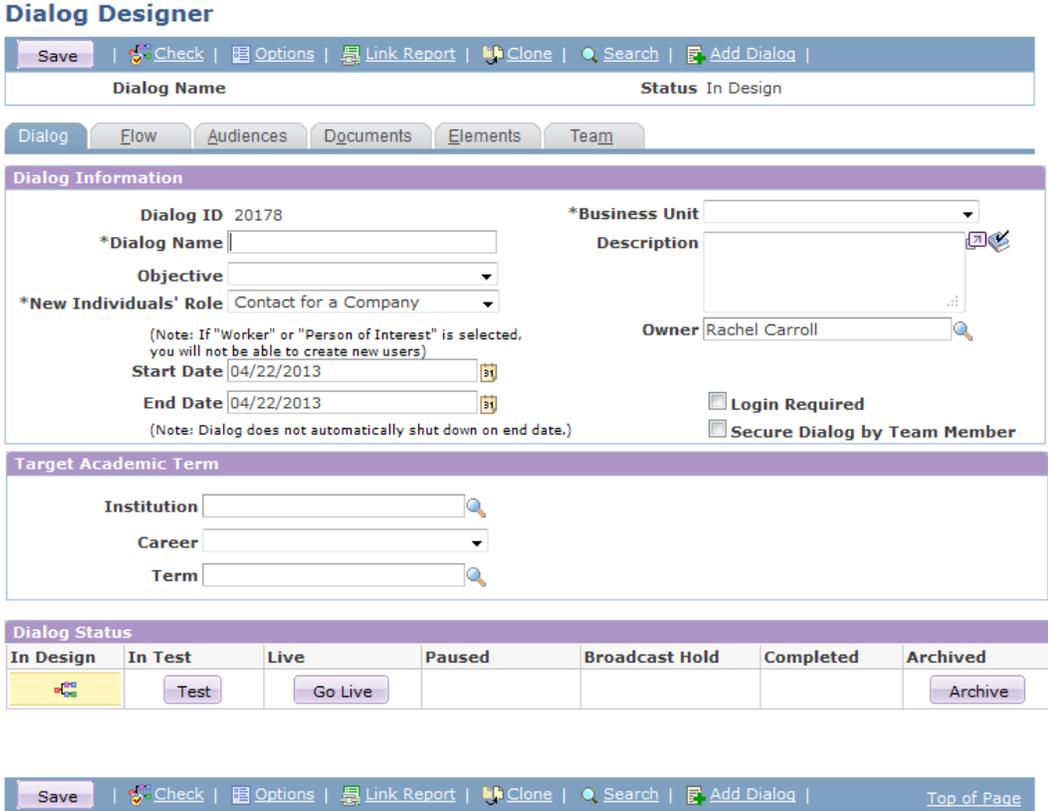
CRM – Building a Dialog Framework

Purpose: The main component of any online marketing campaign is the dialog. The dialog controls the sequence of events that occur in the online campaign. This document describes how to build a Dialog by completing the following tabs:

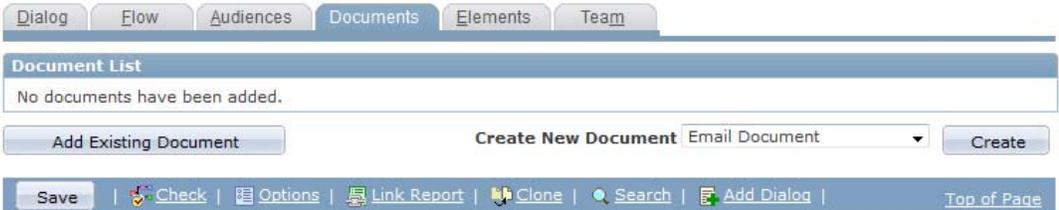
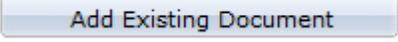
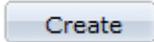
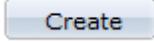
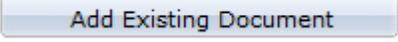
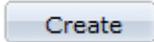
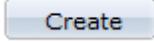
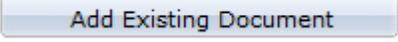
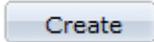
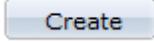
- Dialog
- Documents
- Audience
- Flow

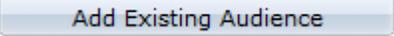
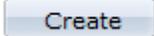
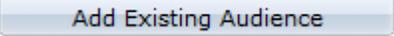
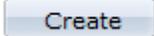
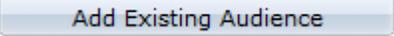
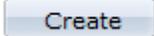
Follow the instructions below to build a new dialog in CRM.

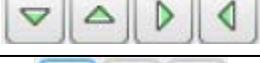
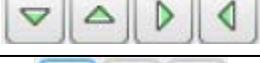
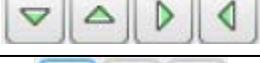
| Step | Action |
|------|---|
| 1. | <p>In CRM, navigate to the Dialog Designer page. Select Main Menu > Marketing > Dialog Designer</p>  |

| Step | Action |
|------|---|
| 2. | <p>Click the Add Dialog button. </p> <p>Result: The <i>Dialog Designer</i> page displays.</p>  <p>The screenshot shows the Dialog Designer interface with the following sections:</p> <ul style="list-style-type: none"> Dialog Information: Dialog ID 20178, *Dialog Name, Objective, *New Individuals' Role (Contact for a Company), Start Date (04/22/2013), End Date (04/22/2013), *Business Unit, Description, Owner (Rachel Carroll), Login Required checkbox, Secure Dialog by Team Member checkbox. Target Academic Term: Institution, Career, Term. Dialog Status: A table with columns: In Design (highlighted), In Test, Live, Paused, Broadcast Hold, Completed, Archived. Buttons: Test, Go Live, Archive. |
| 3. | <p>On the <i>Dialog</i> tab, complete the following:</p> <ul style="list-style-type: none"> • Dialog Name – Enter name for the dialog, using naming convention • Objective – • New Individuals' Role – Select <i>Consumer</i> • Note: If Worker or Person of Interest is selected, new users cannot be created. • Start/End Date(s) – Enter <i>date for which the dialog will start and stop running</i> • Business Unit – Enter or select <i>UNICS</i> • Approval Status – Displays if the Business Unit selected requires it. Values: <i>Approved, Rejected, Requested</i> • Description – Enter as applicable • Login Required checkbox – N/A unless requiring users to authenticate • Secure Dialog by Team Member checkbox – N/A unless restricting access to dialog to certain individuals. <p>NOTE: Target Academic Term section is not used at this time</p> |

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|--|--------|----------------|-----------|--|--|--|-----------|---------|------|--------|----------------|-----------|----------|---|-------------------------------------|--|--|--|--|--|---------------|--------------------|------------------|---|-------------|--|-------------|--|---------------|--|-----------------------|---|------------------|---|-----------------|---|
| 4. | <p>The Dialog Status section shows the current state of the dialog. The  icon is displayed to denote current state.</p> <div data-bbox="358 422 1414 516" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <table border="1"> <thead> <tr> <th colspan="7" style="background-color: #e0e0e0;">Dialog Status</th> </tr> <tr> <th style="background-color: #e0e0e0;">In Design</th> <th style="background-color: #e0e0e0;">In Test</th> <th style="background-color: #e0e0e0;">Live</th> <th style="background-color: #e0e0e0;">Paused</th> <th style="background-color: #e0e0e0;">Broadcast Hold</th> <th style="background-color: #e0e0e0;">Completed</th> <th style="background-color: #e0e0e0;">Archived</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"></td> <td style="text-align: center;"><input type="button" value="Test"/></td> <td style="text-align: center;"><input type="button" value="Go Live"/></td> <td></td> <td></td> <td></td> <td style="text-align: center;"><input type="button" value="Archive"/></td> </tr> </tbody> </table> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Dialog Status</th> <th>Status Description</th> </tr> </thead> <tbody> <tr> <td><i>In Design</i></td> <td>Denotes that the dialog is still in development. While the dialog is in a status of <i>In Design</i>, associated web/email documents and audiences can still be modified. Dialogs that are <i>In Design</i> can be moved to <i>Test</i>, <i>Live</i>, or <i>Archived</i> statuses.</td> </tr> <tr> <td><i>Test</i></td> <td>Dialogs can only be moved to <i>Test</i> from an <i>In Design</i> status. While in a status of <i>Test</i>, the Link Report will generate specific URLs for testing. Additionally, a Test Audience can be assigned to the dialog and certain testing options can be specified. A Dialog that is in <i>Test</i> status can be moved to <i>In Design</i> or <i>Live</i> status.</td> </tr> <tr> <td><i>Live</i></td> <td>Once dialog development and testing has been completed, the dialog can be moved into a status of <i>Live</i>. Placing a dialog in <i>Live</i> state deploys the dialog. This starts the dialog's flow, and makes the web pages of your dialog available to the outside world.</td> </tr> <tr> <td><i>Paused</i></td> <td>Placing a dialog in <i>Paused</i> state pauses all actions, so that you can make significant changes to the dialog and stage the dialog before redeploying it. In this state, none of the dialog's web pages can be accessed by the outside world. To make changes to the dialog, place it in the <i>In Design</i> state first. From the <i>Paused</i> state, you can change the dialog's state to <i>Broadcast Hold</i>, <i>Live</i>, and <i>Complete</i>.</td> </tr> <tr> <td><i>Broadcast Hold</i></td> <td>Placing a dialog in the <i>Broadcast Hold</i> state pauses all outbound actions and leaves the dialog's web pages accessible to the outside world. If you want to change a dialog while it is in <i>Broadcast Hold</i>, place the dialog in the <i>In Design</i> state and you can make changes to outbound and inbound actions of the <i>In Design</i> version. Changes you make will take effect once you move the <i>In Design</i> version to <i>Live</i>.</td> </tr> <tr> <td><i>Completed</i></td> <td>Placing a dialog in <i>Complete</i> state stops the dialog. The dialog is no longer <i>Live</i> and cannot be redeployed. All of the data gathered by the dialog is still available to CRM Analytics. If there is currently a Design version of the dialog at this point, all the changes will be reverted such that there is only one <i>Complete</i> version.</td> </tr> <tr> <td><i>Archived</i></td> <td>Placing a dialog in Archived status makes no functional change; it simply provides a status that you can use to search for dialogs that are no longer used.</td> </tr> </tbody> </table> | Dialog Status | | | | | | | In Design | In Test | Live | Paused | Broadcast Hold | Completed | Archived |  | <input type="button" value="Test"/> | <input type="button" value="Go Live"/> | | | | <input type="button" value="Archive"/> | Dialog Status | Status Description | <i>In Design</i> | Denotes that the dialog is still in development. While the dialog is in a status of <i>In Design</i> , associated web/email documents and audiences can still be modified. Dialogs that are <i>In Design</i> can be moved to <i>Test</i> , <i>Live</i> , or <i>Archived</i> statuses. | <i>Test</i> | Dialogs can only be moved to <i>Test</i> from an <i>In Design</i> status. While in a status of <i>Test</i> , the Link Report will generate specific URLs for testing. Additionally, a Test Audience can be assigned to the dialog and certain testing options can be specified. A Dialog that is in <i>Test</i> status can be moved to <i>In Design</i> or <i>Live</i> status. | <i>Live</i> | Once dialog development and testing has been completed, the dialog can be moved into a status of <i>Live</i> . Placing a dialog in <i>Live</i> state deploys the dialog. This starts the dialog's flow, and makes the web pages of your dialog available to the outside world. | <i>Paused</i> | Placing a dialog in <i>Paused</i> state pauses all actions, so that you can make significant changes to the dialog and stage the dialog before redeploying it. 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| In Design | In Test | Live | Paused | Broadcast Hold | Completed | Archived | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | <input type="button" value="Test"/> | <input type="button" value="Go Live"/> | | | | <input type="button" value="Archive"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Dialog Status | Status Description | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| <i>Test</i> | Dialogs can only be moved to <i>Test</i> from an <i>In Design</i> status. While in a status of <i>Test</i> , the Link Report will generate specific URLs for testing. Additionally, a Test Audience can be assigned to the dialog and certain testing options can be specified. A Dialog that is in <i>Test</i> status can be moved to <i>In Design</i> or <i>Live</i> status. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <i>Live</i> | Once dialog development and testing has been completed, the dialog can be moved into a status of <i>Live</i> . Placing a dialog in <i>Live</i> state deploys the dialog. This starts the dialog's flow, and makes the web pages of your dialog available to the outside world. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Step | Action | | | | | | | | |
|------------------------------------|---|-------------------|---------|--------------------------|--|------------------------------------|--|----------------------------------|---|
| 5. | <p>Click the Save button.</p> <p>Result: The dialog is now saved. The top section shows the Dialog Name and Status.</p> <p>Dialog Designer</p>  | | | | | | | | |
| 6. | <p>Click the Documents tab.</p>  | | | | | | | | |
| 7. | <p>You may add an existing document or create a new email or web document.</p> <table border="1" data-bbox="354 970 1409 1776"> <thead> <tr> <th data-bbox="354 970 743 1010">If you wish to...</th> <th data-bbox="743 970 1409 1010">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="354 1010 743 1213">Add an existing document</td> <td data-bbox="743 1010 1409 1213"> <ul style="list-style-type: none"> Click the Add Existing Document button.  <ul style="list-style-type: none"> Use the <i>search icon</i> to select from the existing documents. Click the Save button. </td> </tr> <tr> <td data-bbox="354 1213 743 1495">Create a new email document</td> <td data-bbox="743 1213 1409 1495"> <ul style="list-style-type: none"> Select Email Document in the <i>Create New Document</i> field.  <ul style="list-style-type: none"> Click the Create button. Complete the <i>Email</i> and <i>Designer</i> tabs. Click the Save button <p>For more details, see Creating an Email Document job aid.</p> </td> </tr> <tr> <td data-bbox="354 1495 743 1776">Create a new web document</td> <td data-bbox="743 1495 1409 1776"> <ul style="list-style-type: none"> Select Web Document in the <i>Create New Document</i> field.  <ul style="list-style-type: none"> Click the Create button. Complete the <i>Email</i> and <i>Designer</i> tabs. Click the Save button <p>For more details, see Creating a Web Document job aid.</p> </td> </tr> </tbody> </table> | If you wish to... | Then... | Add an existing document | <ul style="list-style-type: none"> Click the Add Existing Document button.  <ul style="list-style-type: none"> Use the <i>search icon</i> to select from the existing documents. Click the Save button. | Create a new email document | <ul style="list-style-type: none"> Select Email Document in the <i>Create New Document</i> field.  <ul style="list-style-type: none"> Click the Create button. Complete the <i>Email</i> and <i>Designer</i> tabs. Click the Save button <p>For more details, see Creating an Email Document job aid.</p> | Create a new web document | <ul style="list-style-type: none"> Select Web Document in the <i>Create New Document</i> field.  <ul style="list-style-type: none"> Click the Create button. Complete the <i>Email</i> and <i>Designer</i> tabs. Click the Save button <p>For more details, see Creating a Web Document job aid.</p> |
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| Create a new email document | <ul style="list-style-type: none"> Select Email Document in the <i>Create New Document</i> field.  <ul style="list-style-type: none"> Click the Create button. Complete the <i>Email</i> and <i>Designer</i> tabs. Click the Save button <p>For more details, see Creating an Email Document job aid.</p> | | | | | | | | |
| Create a new web document | <ul style="list-style-type: none"> Select Web Document in the <i>Create New Document</i> field.  <ul style="list-style-type: none"> Click the Create button. Complete the <i>Email</i> and <i>Designer</i> tabs. Click the Save button <p>For more details, see Creating a Web Document job aid.</p> | | | | | | | | |

| Step | Action | | | | | | |
|--------------------------|--|-------------------|---------|--------------------------|--|-----------------------|--|
| 8. | <p>Click the <i>Audiences</i> tab.</p>  | | | | | | |
| 9. | <p>You may add an existing audience or create a new audience.</p> <table border="1" data-bbox="354 653 1406 1136"> <thead> <tr> <th data-bbox="354 653 688 695">If you wish to...</th> <th data-bbox="688 653 1406 695">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="354 695 688 890">Add an existing audience</td> <td data-bbox="688 695 1406 890"> <ul style="list-style-type: none"> Click the Add Existing Audience button.  <ul style="list-style-type: none"> Use the <i>search icon</i> to select from the existing audiences. Click the Save button. </td> </tr> <tr> <td data-bbox="354 890 688 1136">Create a new audience</td> <td data-bbox="688 890 1406 1136"> <ul style="list-style-type: none"> Select Internal: Audience Builder in the <i>Create New Audience</i> field.  <ul style="list-style-type: none"> Click the Create button. Complete the <i>Audience Detail</i> and <i>Result List</i> tabs. Click the Save button <p>For more details, see Creating an Audience job aid.</p> </td> </tr> </tbody> </table> | If you wish to... | Then... | Add an existing audience | <ul style="list-style-type: none"> Click the Add Existing Audience button.  <ul style="list-style-type: none"> Use the <i>search icon</i> to select from the existing audiences. Click the Save button. | Create a new audience | <ul style="list-style-type: none"> Select Internal: Audience Builder in the <i>Create New Audience</i> field.  <ul style="list-style-type: none"> Click the Create button. Complete the <i>Audience Detail</i> and <i>Result List</i> tabs. Click the Save button <p>For more details, see Creating an Audience job aid.</p> |
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| 10. | <p>Click the <i>Flow</i> tab.</p>  | | | | | | |
| 11. | <p>Add an event trigger (Click the External Event Trigger  from the bottom toolbar). Enter a <i>Name</i> and <i>Description</i> for the External Event Trigger. Click the Apply button.</p>  <p>Result: The Event Trigger is added to the flow.</p> | | | | | | |

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|--------|-------------|---|-------------------|---|------------------------|---|--------------|---|-------------------|---|------------|---|-----------------|---|--------------------|---|-----------------|--|--------------|---|----------------|---|----------------|---|---------------|---|-----------|---|--------------------------------|---|-----------------------------|---|---------------------|---|------------------|---|---------------------------------------|---|--|
| 12. | <p>Add additional elements into the flow. <i>Tip:</i> Click on the Trigger element within the flow to activate other elements you wish to add.</p> <table border="1" data-bbox="354 415 1141 1654"> <thead> <tr> <th data-bbox="354 415 678 457">Button</th> <th data-bbox="678 415 1141 457">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="354 457 678 520"></td> <td data-bbox="678 457 1141 520">Date-Time Trigger</td> </tr> <tr> <td data-bbox="354 520 678 583"></td> <td data-bbox="678 520 1141 583">External Event Trigger</td> </tr> <tr> <td data-bbox="354 583 678 646"></td> <td data-bbox="678 583 1141 646">Landing Page</td> </tr> <tr> <td data-bbox="354 646 678 709"></td> <td data-bbox="678 646 1141 709">Intermediate Page</td> </tr> <tr> <td data-bbox="354 709 678 772"></td> <td data-bbox="678 709 1141 772">Final Page</td> </tr> <tr> <td data-bbox="354 772 678 835"></td> <td data-bbox="678 772 1141 835">Standalone Page</td> </tr> <tr> <td data-bbox="354 835 678 898"></td> <td data-bbox="678 835 1141 898">Web Link Promotion</td> </tr> <tr> <td data-bbox="354 898 678 961"></td> <td data-bbox="678 898 1141 961">Broadcast Email</td> </tr> <tr> <td data-bbox="354 961 678 1024"></td> <td data-bbox="678 961 1141 1024">Single Email</td> </tr> <tr> <td data-bbox="354 1024 678 1087"></td> <td data-bbox="678 1024 1141 1087">Update Profile</td> </tr> <tr> <td data-bbox="354 1087 678 1150"></td> <td data-bbox="678 1087 1141 1150">Decision Point</td> </tr> <tr> <td data-bbox="354 1150 678 1213"></td> <td data-bbox="678 1150 1141 1213">Custom Action</td> </tr> <tr> <td data-bbox="354 1213 678 1276"></td> <td data-bbox="678 1213 1141 1276">Push Lead</td> </tr> <tr> <td data-bbox="354 1276 678 1339"></td> <td data-bbox="678 1276 1141 1339">Broadcast Print Correspondence</td> </tr> <tr> <td data-bbox="354 1339 678 1402"></td> <td data-bbox="678 1339 1141 1402">Single Print Correspondence</td> </tr> <tr> <td data-bbox="354 1402 678 1465"></td> <td data-bbox="678 1402 1141 1465">Broadcast Telesales</td> </tr> <tr> <td data-bbox="354 1465 678 1528"></td> <td data-bbox="678 1465 1141 1528">Single Telesales</td> </tr> <tr> <td data-bbox="354 1528 678 1591"></td> <td data-bbox="678 1528 1141 1591">Canvas Scroll (down, up, right, left)</td> </tr> <tr> <td data-bbox="354 1591 678 1654"></td> <td data-bbox="678 1591 1141 1654">Canvas View (zoom in, zoom out, return to original view)</td> </tr> </tbody> </table> | Button | Description |  | Date-Time Trigger |  | External Event Trigger |  | Landing Page |  | Intermediate Page |  | Final Page |  | Standalone Page |  | Web Link Promotion |  | Broadcast Email |  | Single Email |  | Update Profile |  | Decision Point |  | Custom Action |  | Push Lead |  | Broadcast Print Correspondence |  | Single Print Correspondence |  | Broadcast Telesales |  | Single Telesales |  | Canvas Scroll (down, up, right, left) |  | Canvas View (zoom in, zoom out, return to original view) |
| Button | Description | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Date-Time Trigger | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | External Event Trigger | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Landing Page | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Intermediate Page | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Final Page | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Standalone Page | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Web Link Promotion | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Broadcast Email | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Single Email | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Update Profile | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Decision Point | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Custom Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Push Lead | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Broadcast Print Correspondence | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Single Print Correspondence | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Broadcast Telesales | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Single Telesales | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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