Data Super Center Initial Onboarding Checklist

(For detailed instructions and walk-throughs see the DSC training videos)

Log on and password

1. The email address you used when you signed up
2. DSC onboarding page - https://www.datasupercenter.com/Login.aspx

Configuration Wizard

1. Time Zone

Mail Merge Profile

1. The information flows into the email and mail templates
2. Make sure all information is correct and spelled correctly
3. Name can be the name of a person (John Smith) or a role (Customer Service Team)
4. Phone Number: Start with your normal business phone number, but change it to your VoiceTouch number after you select one
5. Newsletter Settings: Leave Blank for now

Set Up Emails to Automatically Send

1. Click on the *To-Do* tab at the top of the page
2. Click on the *Send Emails* sub-tab
3. Check the AutoSend box. (We suggest you select send in the morning option)

Modify and Validate Email Templates

1. Automated, merge field filled email templates are the foundation of the Data Super Center
2. We provide many prewritten, merge field loaded templates
3. You MUST personalize and validate the email templates for you and your business. DO NOT send out an email template that has not been checked for personalization and errors.
4. **To make the process easy, check email templates as you decide to use them, do not spend hours trying to check all templates as there will be some templates that you never use.**

VoiceTouch Marketing Phone Number (Optional)

1. You must use a VoiceTouch phone number if you want to use text messaging, voice hotlines, and the Voice Touch answering machine functionality of the system
2. If you want to use your existing phone number as your marketing contact number, skip setting up Voice Touch

Setting Up Voice Touch

1. Click on the VoiceTouch tab and click the "Let's Get Started Box"
2. Select a phone number that will be used as your marketing and tracking phone number. (We recommend you use the Area Code Option as your search option)
3. Once you have selected a phone number you will see it display on your VoiceTouch Screen
4. (Note: VoiceTouch is an automated answering machine system. Set it up just as you would a normal answering system with: a main greeting that details the various extensions available to a caller, call forwarding options, and multiple extensions that can have their own message or automatically forward to another phone number)
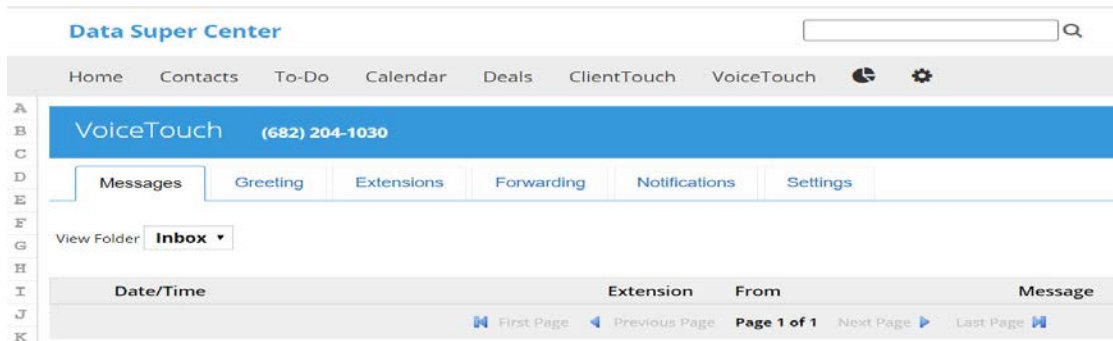
Setting Up Text Messaging

1. Text Messaging is a built-in, no-charge feature of the Data Super Center
2. A contact has to opt-in by texting their email address or the word start to the VoiceTouch phone number. **You CAN NOT send a text to a person that did not text into the system first! This will protect you and us a company from potential legal actions related to text messaging.**
3. You can't send a mass text message blast using our system, only one-to-one text messages
4. Your VoiceTouch number is your inbound text message number
5. Once a contact has opted in, you can send individual text, schedule automated text through a workflow, and assign an autoresponder email series. You should always have at least one autoresponder email that goes out when a person text into the system (See our text message response email template)
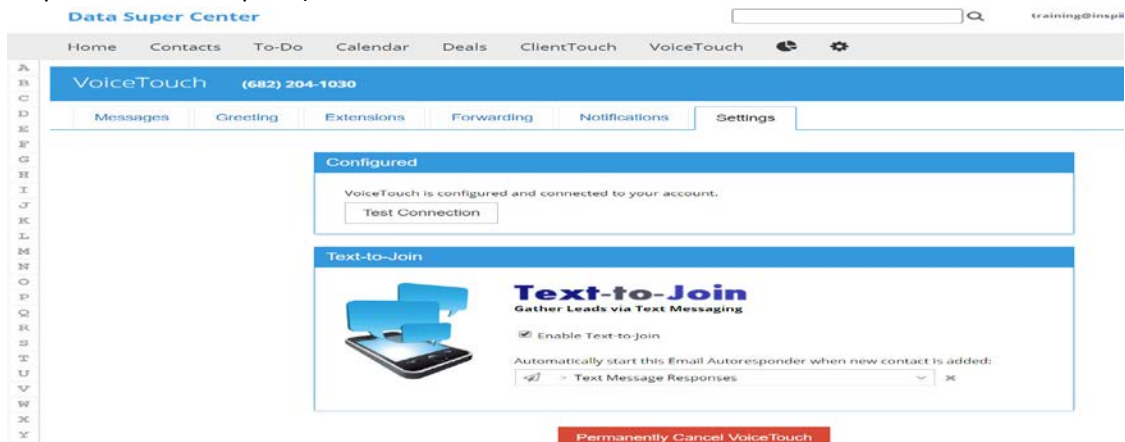
This initial onboarding checklist will lay the foundation for using the Data and Marketing Super Center, however, it is important that you take the time to watch the training videos associated with each part of the system.

DO NOT OVERWHELM YOURSELF by trying to watch all of the videos in one day or one week.

Work with one part of the system at a time (such as Email, VoiceTouch, Landing Pages, etc.) and you will quickly learn and experience the true power of this "Best-in-Class" Data and Marketing CRM.

Billy R. Williams, PhD

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"People with a *Wealthy Mentality* make complicated things seem simple; People with a *Poor Person's Mentality* make simple things unnecessarily complicated"

Check out some of my free business mentoring videos and podcast

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