CHAPTER 8: PROFILING AND CLASSIFICATION

Objectives

The objectives for this chapter are:

- Describe profile questionnaires.
- Set up profile questionnaires.
- Update profile questionnaires.
- Explain automatic classification.
- Create contact rating.
- Enter contact profiles.
- Add contacts to segments using profile information.
- Test and print questionnaires.
Introduction

The Profiling and Classification feature enables you to specify additional information about your contacts. This information is presented in a form of questions that you ask your contacts, along with the answers, and is called a profile questionnaire. Answers can be given manually or automatically. This chapter tells you how to:

- Set up a profile questionnaire and assign it to a contact.
- Have the program give answers to the questions automatically.
- Rate your contacts according to the answers they give.

Profile Questionnaires

Profile questionnaires are used to provide additional information about your contacts. For a contact, several different profile questionnaires can be created. Later, one of them can be assigned. The profile questions are visible on the Lines FastTab of the contact card, giving you a quick overview of information about the contact.

To be able to assign a profile questionnaire, it first must be set up.

Setting Up Profile Questionnaires

Each profile questionnaire consists of one or several questions and one or several answers to each question. Setting up a profile questionnaire involves:

- Creating a profile questionnaire code with specifying a contact type the questionnaire must be used for.
- Entering questions you intend to ask your contacts and giving answers to them.

To create a new profile questionnaire code and specify a contact type for it, follow this procedure:

1. In the navigation pane, click Departments > Sales & Marketing > Marketing, and then under Administration, in Profile, click Questionnaire Setup. The Profile Questionnaires window appears.
FIGURE 8.1 PROFILE QUESTIONNAIRES

2. In the Action Pane, click New to create a new profile.
3. In the Code field, enter a code for a new profile.
4. In the Description field, enter a description for the new profile.
5. Click the AssistButton next to the Priority field, and select among the existing priorities: Very Low, Low, Normal, High, or Very High.
6. Click the AssistButton next to the Contact Type field, and select the type of contact you want to use this profile questionnaire for. You can select among people and companies. The profile questionnaire will be available for assigning to contacts of the relative type if their business relation type coincides with the type selected in this field.
7. In the Business Relation Code field, click the AssistButton and select the business relation this profile applies to.

Now, as the profile questionnaire is created, you can enter questions and answers for it. You can give answers manually or have the program automatically answer some of the questions based on information specified on the contact card (for more information about answering profile questions automatically, refer to the “Automatic Classification” topic in the chapter).

To enter questions and answers, take the following actions:
1. In the Action Pane of the **Profile Questionnaires** window, click **Edit Questionnaire Setup**. The **Profile Questionnaire Setup** window appears.

![Profile Questionnaire Setup](image)

**FIGURE 8.2 ENTERING QUESTIONS AND ANSWERS TO THE PROFILE QUESTIONNAIRE**

2. On the first empty line, click the AssistButton next to the **Type** field and select Question.
3. In the **Description** field, enter the question.
4. If more than one answer can be applied to a contact, select the **Multiple Answers** check box.

Once you have entered a question, you must give at least one answer to it. The lines with answers must be right below the line with the question. You fill in the answers in the order that you want them to appear on a printed questionnaire.

5. Click the AssistButton next to the **Type** field, and select Answer.
6. In the **Description** field, enter the answer.
7. In the **Priority** field, click the AssistButton and select the priority level you want to assign to the answer: Very Low (Hidden), Low, Normal, High, or Very High.

Repeat steps 2-7 to enter as many questions and answers as you need.

The next fields in the **Profile Questionnaire Setup** window are used when automatic contact classification is set up. They are described in the “Automatic Classification” topic in this chapter.

Once the questions and answers are entered, the **Profile Questionnaire Setup** window looks as shown on the following figure.
Moving Lines Up or Down

In the Profile Questionnaire Setup window, you can move a line to a different place, for example, if you want the answers to a question to appear in a different order or to move a question and its answers to a different place in the questionnaire. To do so, perform the following procedure:

1. Open the Profile Questionnaire Setup window.
2. Select the line to be moved, and click Actions > Function > Move Up or Actions > Function > Move Down.

The program moves the selected line one line up or one line down.

Assigning a Profile Questionnaire to a Contact

Once the profile questionnaire is set up, it can be assigned to a contact. Assigned profiles help view additional information on contacts directly on their cards.

To assign a profile to a contact, follow this procedure:

1. In the navigation pane, click Home > Contacts.
2. Browse to the contact you want to assign a profile questionnaire and click Related Information > Contact > Profiles.
3. In the Contact Profile Answers window, click the AssistButton next to the Profile Questionnaire Code field. The Profile Questionnaire List window appears with a list of profiles available for the selected type of contact.
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FIGURE 8.4 PROFILES AVAILABLE FOR A CONTACT

4. Select a profile to be assigned to the contact and click **OK**.

5. The **Contact Profile Answers** window fields are filled in with information from the selected profile.

FIGURE 8.5 THE PROFILE ASSIGNED TO A CONTACT

6. Click **OK** to save your changes.

As the profile questionnaire is assigned to the contact, answers on questions from the profile can be viewed on the **Lines** FastTab on the contact card.
Automatic Classification

You can have the program automatically classify your contacts according to contact, customer, vendor, and information by selecting questions that must be answered automatically. Automatic contact classification supposes giving answers to questions automatically as you assign the profile questionnaire containing these questions to a contact. The program takes information about customers and vendors that are synchronized with the contact and uses it for generating answers (for more about synchronizing contacts with customer, vendor, and bank account, refer to the “Synchronizing Contacts with Customers, Vendors, and/or Bank Accounts” section in the “Contacts” chapter).

To have the program automatically answer the questions entered in the Profile Questionnaire Setup window, follow this procedure:

1. In the Profile Questionnaire Setup window, browse to the question that you want to be automatically answered, and then click Related Information > Line > Question Details. The Profile Question Details window appears.

The fields on the General FastTab are filled in for you, based on the information you entered in the Profile Questionnaire Setup window. If you change them in the Profile Question Details window, the settings will be inherited by the Profile Questionnaire Setup window.

2. On the Classification FastTab of the Profile Question Details window, select the Auto Contact Classification check box.
Once you select the **Auto Contact Classification** check box, other fields on this FastTab become editable. The following table explains the meaning of the fields on the **Classification** FastTab.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Class. Field</strong></td>
<td>In these fields, select the criteria you want the program to use for classifying contacts. You can only fill in one of these fields. Once you fill in one of these fields, the other two will become non-editable, but fields on the right side of this FastTab will become available for editing.</td>
</tr>
<tr>
<td><strong>Vendor Class. Field</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Contact Class. Field</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Starting Date</strong></td>
<td>In these fields, set up date formulas for the dates the program will use to start and stop classifying contacts.</td>
</tr>
<tr>
<td><strong>Ending Date</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Classification Method</strong></td>
<td>In this field, select the method the program will use to classify the contacts. You can select among Defined Value, Percentage Value, and Percentage of Contacts. For information about these options, refer to the “Classification Method” section in this chapter.</td>
</tr>
<tr>
<td><strong>Sorting Method</strong></td>
<td>In this field, select the sorting method for the automatic classification the question is based on. You can select among two options: Ascending and Descending. You only need to fill in this field if either Percentage of Value or Percentage of Contacts in the <strong>Classification Method</strong> field is selected.</td>
</tr>
<tr>
<td><strong>No. of Decimals</strong></td>
<td>In this field, enter the number of decimal places you will use when filling in the <strong>From Value</strong> and <strong>To Value</strong> fields in the <strong>Profile Questionnaire</strong></td>
</tr>
</tbody>
</table>
3. After you have selected the necessary options, close the **Profile Question Details** window by clicking **OK**. If you click **Cancel**, no changes will be saved.

As the automatic contact classification is set up for a question, the **Auto Contact Classification** check box in the **Profile Questionnaire Setup** window is selected for that question. Now, you must specify criteria for the program to choose which answer is correct.

4. For the question that you set to auto classification, in the **Profile Questionnaire Setup** window, specify values that the program will use when choosing the correct answer to the question.

To understand what the values in these fields mean, take a look at the question Discount (%) Current Year on the “Automatic Contact Specification Is Set Up” figure. After the auto classification had been performed, the program found five contacts who had discounts more than five times (according to the value in the **From Value** field), one contact who had discounts from two to four times (according to the value in the **From Value** and **To Value** fields), and 62 contacts who had discounts only once during the current year (according to the value specified in the **To Value** field).

The **No. of Contacts** field shows how many contacts gave this answer. This field is filled in by the program after the automatic classification is performed.

![Automatic Contact Specification Is Set Up](image)

**FIGURE 8.8 AUTOMATIC CONTACT SPECIFICATION IS SET UP**

**Updating Profile Questionnaires**

The program does not automatically update the classification of contacts. To have the correct number of contacts recorded for each answer in the **Profile Questionnaire Setup** window, you must regularly update the contact classification. Do this with the Update Contact Classification batch job.
This batch job updates all the answers to the profile questions that are automatically answered by the program based on customer, vendor, or contact data. If you want to include more information to be updated, you can select additional fields to be included in the batch job.

To update contact classification, follow this procedure:

1. In the navigation pane, click **Departments > Sales & Marketing > Marketing**, and then under Tasks, in **Periodic Activities**, click **Update Contact Classification**.
2. The **Update Contact Classification** request form appears.
3. On the **Profile Questionnaire Header** FastTab, set filters for the profile questionnaires you want to update. If you want to update all the profile questionnaires, do not specify any filters.
4. On the **Options** FastTab, enter the date of the update. Only new information up to that date and entered on that date will be included in the update.
5. Click **OK** to run the batch job. If you do not want to run the batch job now, click **Cancel** to close the batch job.

The program compares information on customer, vendor, and contact cards, and if new information was entered prior to or on the specified date, the program uses this information for answering the questions in the profile questionnaires.

**Classification Method**

The **Classification Method** field determines the method that the program will use to classify contacts. There are three options: Defined Value, Percentage of Value, and Percentage of Contacts. The following table offers description of each option of this field.
### Lab 8.1 – Set Up a Questionnaire

In this lab, you will practice setting up a profile questionnaire for a vendor.

**Scenario**

You need to set up a new questionnaire for contacts that are vendors. Answers must be given automatically by the program.

**Challenge Yourself**

1. Create a profile questionnaire with a question and answers.
2. Make the program choose correct answers to the question.
3. Assign the new profile questionnaire to a contact.

**Need a Little Help?**

1. Create a profile questionnaire called Sales.
2. Enter a question, Number of sales, and answers
   - 1..49
   - 50..99
   - 100+
3. Make the program use automatic classification by specifying the following information:
   - Purchase (LCY)
   - Current Year (use percentage of value)
Chapter 8: Profiling and Classification

- Defined Value

4. Assign the profile questionnaire to contact AR Day Property Management.

**Step by Step**

*Create a profile questionnaire called Sales.*

1. In the navigation pane, click Departments > Sales & Marketing > Marketing > Questionnaire Setup.
2. In the Profile Questionnaires window, click New to create a new profile.
3. In the Code and Description field, enter “Sales” for the new profile questionnaire.
4. Click the AssistButton next to the Contact Type field and select Companies.

*Enter a question and answers.*

1. In the Action Pane, click Edit Questionnaire Setup.
2. Click the AssistButton in the Type field and select Question.
3. In the Description field, enter “Number of sales”.
4. On the new line, click the AssistButton in the Type field and select Answer.
5. In the Description field, enter “1..49”.
6. For the second answer, enter “50..99”. For the third answer, enter “100+”.

*Make the program use automatic classification.*

1. Click Related Information > Line > Question Details.
2. Select the Auto Contact Classification check box.
3. Click the AssistButton next to the Vendor Class. Field field and select Purchase (LCY).
4. In the Starting Date Formula field, enter CY for the current year.
5. Click the AssistButton next to the Classification Method field and select Defined Value. Click OK.
6. In the To Value field for the first answer, enter “49”.
7. In the From Value field for the second answer, enter “50”. In the To Value field, enter “99”.
8. In the From Value field for the third answer, enter “100”.
9. Click OK.

*Assign the profile questionnaire to contact AR Day Property Management.*

1. Open the list of the contacts and browse to contact company CT000067, AR Day Property Management.
2. Click **Related Information > Contact > Profiles**. The **Contact Profile Answer** window appears.

![Contact Profile Answer Window](image)

**FIGURE 8.10 VIEWING CONTACT PROFILE ANSWERS**

3. Click the AssistButton next to the **Profile Questionnaire Code** field and select the Sales profile you just created.

4. Click **OK**.

**Contact Rating**

**NOTE**: To work with the following section, use the Classic version of Microsoft Dynamics® NAV 2009.

Contact rating is similar to contact estimation. Create a contact rating by giving points to each answer in the contact profile questionnaire and, depending on the range you specified in the **From Value** and **To Value** fields, the program will group your contacts into the categories. You create categories separately, for example, High, Low, or A, B, and C.

There are two methods for rating your contacts:

- Use the Create Rating wizard. Access the wizard from the **Profile Questionnaire Setup** window by clicking **Actions > Functions > Create Rating**.

  Or

- Set the rating up manually.
Creating Contact Rating Manually

*NOTE: Remember to open the Classic version of Microsoft Dynamics NAV.*

To manually create rating for your contacts, follow this procedure:

1. Open the **Profile Questionnaire** window.

2. Click the AssistButton next to the **Profile Questionnaire Code** field and select a profile questionnaire you need to create rating for.

3. In the **Profile Questionnaire Setup** window, select the line with the question you want to rate and click **Line > Question Details**.

4. On the **Classification** tab of the **Profile Question Details** window, select the **Auto Contact Classification** check box.

5. Click the AssistButton next to the **Contact Class. Field** field and select **Rating**.

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**FIGURE 8.11 PROFILE QUESTIONNAIRES**

**FIGURE 8.12 SETTING UP CONTACT RATING**
6. Fill in the **Min. % Questions** field (0 is default) with the percent of questions that must be answered for rating to be calculated by the program.

7. Click the **Answer Points** button.

8. In the **Points** field, enter the points you want to assign to each answer.

![Figure 8.13 Answer Points Specified](image)

**FIGURE 8.13 ANSWER POINTS SPECIFIED**

9. If you want to get an overview of the points you have given to each answer, click **Points > List**. The **Answer Points List** window appears, where you can view all the points you assigned.

![Figure 8.14 A List of Answer Points](image)

**FIGURE 8.14 A LIST OF ANSWER POINTS**

10. Return to the **Profile Questionnaire Setup** window.

11. Click **Functions > Update Classification**. The **Update Contact Classification** batch job appears. To update classification on all contacts, do not specify any filters. Click **OK** to run an update.

You can now view the result of your rating on the lines in two places:
In the Profile Questionnaire Setup window, the values in the From Value, To Value, and No. of Contacts fields.

On the lines of the contact card for the contact the selected profile is assigned to.

Creating Contact Rating Automatically

To have the program create contact ratings automatically, follow these actions:

1. Open the Questionnaire Setup window.
2. Select a profile which you want to create rating for and click Edit Questionnaire Setup.
3. In the Profile Questionnaire Setup window, click Actions > Functions > Create Rating.
4. In the Create Rating wizard, click the AssistButton next to the For which questionnaire should this rating be created field and select, for example, CUSTOMER.
5. In the Describe the type of rating field, enter the questionnaire description.
6. In the What percentage of questions need to be answered before a rating is assigned? field, enter “20” to indicate the percentage of questions needed to be answered before a rating is assigned.
7. Click Next.
8. In the Specify which of the following grouping methods you will use to rate your contacts field, select ABC. Click Next.
9. For rating A, set the interval from 1 to 20. Click Next.
10. For rating B, set the interval from 21 to 40. Click Next.
11. For rating C, set the interval from 41 to 60.
12. Click Next, and then Finish.
13. Go back to the Profile Questionnaires window. Browse to the CUSTOMER profile and click Edit Questionnaire Setup.
14. In the Profile Questionnaire Setup window, browse to the new question with Answer C. Its values are from 41 to 60.

![Profile Questionnaire Setup](image)

**FIGURE 8.16 AUTOMATICALLY CREATED RATING**

The new question, answers, and rating appear at the bottom of the list. The description of the rating type you entered in the wizard is used as a new question. Answers are grouping methods you selected. The values you specified for rating are entered in the From Value and To Value fields.

**Lab 8.2 – Rate Your Contacts**

In this lab, you will practice creating rating for a contact.

**Scenario**

You need to create rating of your prospects to make it possible for you to identify the ideal prospects to focus your sales campaign on.

**Challenge Yourself**

You choose to base the rating on four different questions to group your prospects in the following categories: Ideal, Good, Average, Not interesting.

**Need a Little Help?**

1. Create a new profile questionnaire with the code name IDEAL.
2. Set up questions and answers in the questionnaire.
3. Create rating of your prospects based on these four questions to group them into the categories: Ideal, Good, Average, Not interesting.
Step by Step

Create a new profile questionnaire with the code name Ideal.

1. Open the Profile Questionnaire Setup window.
2. Click the AssistButton next to the Profile Questionnaire Code field.
3. In the Profile Questionnaire window, go to the first empty line to create a new profile.
4. In the Code and Description fields, enter “Ideal”.

Set up questions and answers in the questionnaire.

1. Click Edit Questionnaire Setup.
2. In the Profile Questionnaire Setup window, set up the questions and answers shown in the following figure.

FIGURE 8.17 THE PROFILE QUESTIONNAIRE SET UP

Create the rating of your prospects based on these four questions to group them into the categories: Ideal, Good, Average, Not interesting.

1. For each with a question, click Related Information > Line > Question Details.
2. In the Profile Question Details window, select the Auto Contact Classification check box.
3. Click the AssistButton next to the Contact Class. Field field and select Rating.
4. In the Min. % Questions field, enter “20”.
5. In the Action Pane of the Profile Question Details window, click Answer Points.
6. Enter the points you want to assign to each answer listed in the Answer Points window.
7. In the Profile Questionnaire Setup window, click Functions > Update Classification.
8. Click OK to run the batch job and update classification.

**Adding Contacts to Segments Using Profile Information**

You can use profile information as criteria for selecting contacts for segments. Detailed information about segments can be found in the “Campaigns and Segmentation” chapter.

To add contacts to a segment taking into consideration their profile information, follow this procedure:

1. In the navigation pane, click the Home button, and then click Segments.
2. Select the segment to which you want to add contacts and open its card.
3. In the Action Pane, click Add Contacts. The Add Contacts window appears.
4. Go the Profile FastTab and click the AssistButton next to the Profile Questionnaire Code field to select the relevant questionnaire.
5. Click the AssistButton next to the Line No. field. Select the line that contains profile questionnaire code and description – the question and answers – that you want the program to use as a filter when you select contacts for the segment.

![FIGURE 8.18 SELECTING PROFILE QUESTIONNAIRE](image)

6. After you filled in all the fields on the other FastTabs of the Add Contacts window, click OK.

The program adds all the contacts that meet the selected answer on the selected questionnaire to the segment.
Lab 8.3 – Add Contacts to a Segment

In this lab, you will practice adding contact to a segment according to their profile.

**Scenario**

You want to add to a segment (SM 10001 - Increase Sale) all your contacts that are companies with more than 1000 employees.

**Challenge Yourself**

Use a profile questionnaire as criteria for adding contact companies to the Increase Sale segment.

**Step by Step**

1. Open the list of the segments.
2. Open the segment card for the Increase sale segment.
3. In the Action Pane, click Add Contacts.
4. Click the AssistButton next to the Profile Questionnaire Code field and select COMPANY.
5. Click the AssistButton next to the Line No. field and select line 50000 since it refers to the company with more than 1000 employees.
6. Leave all other fields on other FastTabs of the Add Contact request form empty.
7. Click OK to run the batch job and add all relevant companies to the segment.

The Segment window with companies added now looks as shown in the following figure.
NOTE: This lab ends using the Classic version of Microsoft Dynamics NAV in this chapter.

Testing and Printing Questionnaires

You can print test reports and questionnaire handouts. Both reports and handouts print the questionnaire questions and answers, but the handout is designed to be viewed by your contacts. Specifying filters determines the information and the questionnaires to be printed on the reports.

You can print test reports of your profile questionnaires. A test report shows information from each line of the **Profile Questionnaire Setup** window. You can also print questionnaires to be distributed to your contacts and returned to you.

**Printing the Test Report**

To print a test report, follow this procedure:

1. Open the **Profile Questionnaires** window.
2. Select a profile you want to print a test report for and click **Edit Questionnaire Setup**.
3. In the **Profile Questionnaire Setup** window, click **Actions > Function > Test Report**. The **Questionnaire - Test** window appears.
4. Click the AssistButton next to the Code field and select the questionnaire you want to test (if you leave this field blank, the questions and answers for all your questionnaires will appear on the report).

5. To print the report, click the Print button. To preview the report on screen, click Preview. If you do not want to print the report, click Cancel.

The following figure shows a preview of the report.

Printing the Questionnaire – Handouts Report

With the questionnaire handouts report, you can print your profile questionnaires and distribute them among your contacts. To print the report, follow this procedure:
1. Open the **Profile Questionnaires** window.

2. Select a profile you want to print a handouts report for and click **Edit Questionnaire Setup**.

3. In the **Profile Questionnaire Setup** window, click **Actions > Function > Print**. The **Questionnaire – Handouts** window appears.

![Edit - Questionnaire - Handouts](image)

**FIGURE 8.22 PRINTING HANDOUTS**

4. On the **Profile Questionnaire Header** FastTab, click the AssistButton next to the **Code** field and select the profile questionnaire that you want to print. If you leave this field empty, all your questionnaires will be printed.

5. On the **Options** FastTab, select the **Print Classification Fields** check box if you want the report also to include the questions that are automatically answered by the program.

6. To print the report, click the **Print** button. To preview the report on screen, click **Preview**. If you do not want to print the report, click **Cancel**.

The following figure shows a preview of this report.
Lab 8.4 – Update Contact Classification and Print a Report

In this lab, you will practice updating contact classification with the Update Classification wizard and printing a handouts report.

Scenario

Make the contact classification up-to-date. Print a report.

Challenge Yourself

Update the contact classification with the Update Classification wizard. Print the report.

Step by Step

*Update the contact classification.*
1. In the navigation pane, click Departments > Sales & Marketing > Marketing > Update Contact Classification.

2. Click the AssistButton next to the Code field and select the COMPANY profile questionnaire code. Click OK.

Print a test report for your new questionnaire.

1. Open the Profile Questionnaires window.
2. Select the profile for which you want to print a report. In the Action Pane, click Edit Questionnaire Setup.
3. Click Actions > Functions > Print. Click Print to print out the report.

Summary

Microsoft Dynamics NAV offers you means for entering additional information about your contacts: profile questionnaires. A profile questionnaire is a set of questions and answers about the contact. You can give answers manually or have the program do it automatically.

Using profile questionnaire information as criteria of selection enables you to add contacts to a segment.

Profile questionnaires can be printed and distributed among your contacts.
Test Your Knowledge

1. What are questionnaires used for?

2. True or False: Automatic classification is used for having the program automatically generate questions and give answers.

3. Complete the following sentence: You can use _____ information to add contacts to _____ for your campaigns.

4. The Update Contact Classification batch job updates
   ( ) Contacts
   ( ) Questions
   ( ) Answers
   ( ) Customers

5. Where do you set up contact rating?
Quick Interaction: Lessons Learned

Take a moment and write down three Key Points you have learned from this chapter

1. 
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

2. 
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

3. 
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
Chapter 8: Profiling and Classification

Solutions

Test Your Knowledge

1. What are questionnaires used for?

MODEL ANSWER:

You create your profile questionnaires to provide precisely the information you want to view on the contact card.

2. True or False: Automatic classification is used for having the program automatically generate questions and give answers.

False. You can have the program automatically answer the questions that you set up.

3. Complete the following sentence:
   You can use _____ information to add contacts to _____ for your campaigns.

MODEL ANSWER:

You can use profile information to add contacts to segments for your campaigns.

4. The Update Contact Classification batch job updates

   ( ) Contacts
   ( ) Questions
   (√) Answers
   ( ) Customers

5. Where do you set up contact rating?

MODEL ANSWER:

You set up contact rating in two places:

- The Answer Points window.
- The Contact Rating wizard.