

Y E M

Your Enquiry Manager

Adding Event Types to your Account
Your “Virtual Personal Assistant”

Your Enquiry Manager

“CONNECTING PEOPLE”

ADDING AND REMOVING **EVENT TYPES** TO YOUR YEM ACCOUNT

- Think carefully about which Event types are specific to your business
- A reception venue might handle weddings, corporate functions, private events etc
- A photographer might specialise in family portraits, head shots and glamour photography
- Choose the event types that match your business profile - do not choose too many, keep it simple, you can always add more later
- Because YEM will respond to your enquiries instantly you will want event types to match the different event response you would usually make

BEWARE SAFARI BROWSERS

- You will use pop up boxes in YEM set up and to access New Enquiry from the main menu
- To be able to access YEM functionality that involves pop up boxes you will need to disable Safari's **Block Pop-up Windows**
- This can be found in the Safari Settings menu itself (simply untick) or under Preferences, also located within Safari Settings menu
- To disable **Block Pop-up Windows** within Preferences, first open the Security tab, then remove the tick from the Block Pop-up windows option

FIRST LOG IN TO YOUR DASH BOARD

Browser address bar: <http://testapp.studiowebonline.com.au/Client/Default.aspx>

Browser tabs: Your Enquiry Manager, Westpac Onl...g - Westpac, St George Banking, Commonweal...ank Group, StudioWebOnline, SWO Sales, Apple, Yahoo!, Google Maps, YouTube, Wikipedia

Navigation icons: Home, Calendar, Clients, Reports, Enquiries, **Setup** (circled), Support, Logout

Your Enquiry Manager

YEM Your Enquiry Manager

Common Tasks

- Events
 - [New enquiry](#)
- Search
 - [Search clients](#)
 - [Search venues](#)
- Calendar
 - [View calendar](#)
 - [View team calendar](#)
 - [Add general task](#)

Home

Upcoming Appointments

Appointment	Time

Pending Enquiries

Host	Date entered	Event type	Client		
	06-Mar-2011	Wedding	Vernell Hill	✓	✗
	06-Mar-2011	Wedding	Jane Cheung	✓	✗
	06-Mar-2011	Wedding	Danielle Thomas	✓	✗
	06-Mar-2011	Wedding	Rennie Sofos	✓	✗
	06-Mar-2011	Wedding	Catherine Wills	✓	✗
	06-Mar-2011	Wedding	Lee-anne Cutler	✓	✗
	06-Mar-2011	Wedding	Michael Savage	✓	✗

Upcoming Tasks

Task

Overdue Tasks

Task

Home Calendar Clients Reports Enquiries **Setup** Support

Your Enquiry Manager

Administration

- [Account Details](#)
- Events**
- Your Event Steps**
- Your Web Enquiry Page**
- [Enquiry Page](#)
- [Reportable Fields](#)
- [Automatic Enquiry Response](#)
- Import Data**
- [Clients](#)
- Export Data**
- [Clients](#)

Administration

Account Details

New Host Account

22 New Street
Newville NSW 2000

(p) 5555 7777
(e) newhost@new.com.au
(w) www.newhost.com.au

Users

Username	Name
newhost	Tom Smith

Active Modules

Module
Your Virtual P.A. This module provides access to your calendar steps and enquiry page.
Your Automatic Enquiry Response The Automatic Enquiry Response module instantly send a customised webpage response to enquiries.
Your Enquiry Manager - Host Host

To add or remove event types on a YEM Enquiry Page first click the **set up** icon to go to Administration and then click on **Your event steps**.

Administration



[Account Details](#)

Events

[Your Event Steps](#)

Your Web Enquiry Page

[Enquiry Page](#)

[Reportable Fields](#)

[Automatic Enquiry Response](#)

Import Data

Administration

Event Types



List Active Events Only



Event type

Wedding

Function

General

Private Functions

Small package Weddings

Steps

	Step	Parent Step
	Enquiry Date	
	Enquiry Follow Up	Enquiry Date
	Booked Date	
	Event Date	
	Event Complete	

Once in the **Event Types** screen click **+**

Event Type

Event Type Details

Name

Base Type

Wedding

Active

Save Cancel

The **Event Type Details** screen will appear and you can enter your Event name e.g. Portrait or Conference or Church weddings

Event Type

Event Type Details

Name
Church weddings

Base Type
Wedding

Active

Save Cancel

Event Type

Event Type Details

Name
Church weddings

Base Type
Wedding

Wedding
Function
General

Save Cancel

After entering your Event type, select from the **Base type Drop down menu** e.g. Portrait would be General base type, Conference would be Function base type, Church weddings is part of Weddings.

Base Types are very important for statistical groupings and reports

Don't forget - tick **active** and **Click save**

Next add the new event type to your enquiry page or pages - where you want to see it included in the display.

Return to the dashboard and click **set up**
This will take you to the Administration page.

Home Calendar Clients Reports Enquiries **Setup** Support

Your Enquiry Manager

Administration

- [Account Details](#)
- Events**
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Account Details

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Username	Name
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Then click on Enquiry Page

Administration

[Account Details](#)

Events

[Your Event Steps](#)

Your Web Enquiry Page

Enquiry Page

[Reportable Fields](#)

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Import Data

[Clients](#)

Export Data

[Clients](#)



Web Enquiry Page Setup Area for: YEMDemo

General

Email Settings

Enquiry Form Fields

Your available Enquiry Pages

<input checked="" type="radio"/>	YEMDemo	X
<input type="radio"/>	Wedding	X

Make sure to select the correct Enquiry page if you have more than one

Display Settings

Font Colour



Font

Arial



Background Colour



Font-Size

8pt



Event Types to Display

Wedding



Private Functions



Function



General



Church Weddings



Click here to select the event you wish to add



Content Settings

Web Enquiry Page Access

Use this page for my Home

Enquiry page partners' o

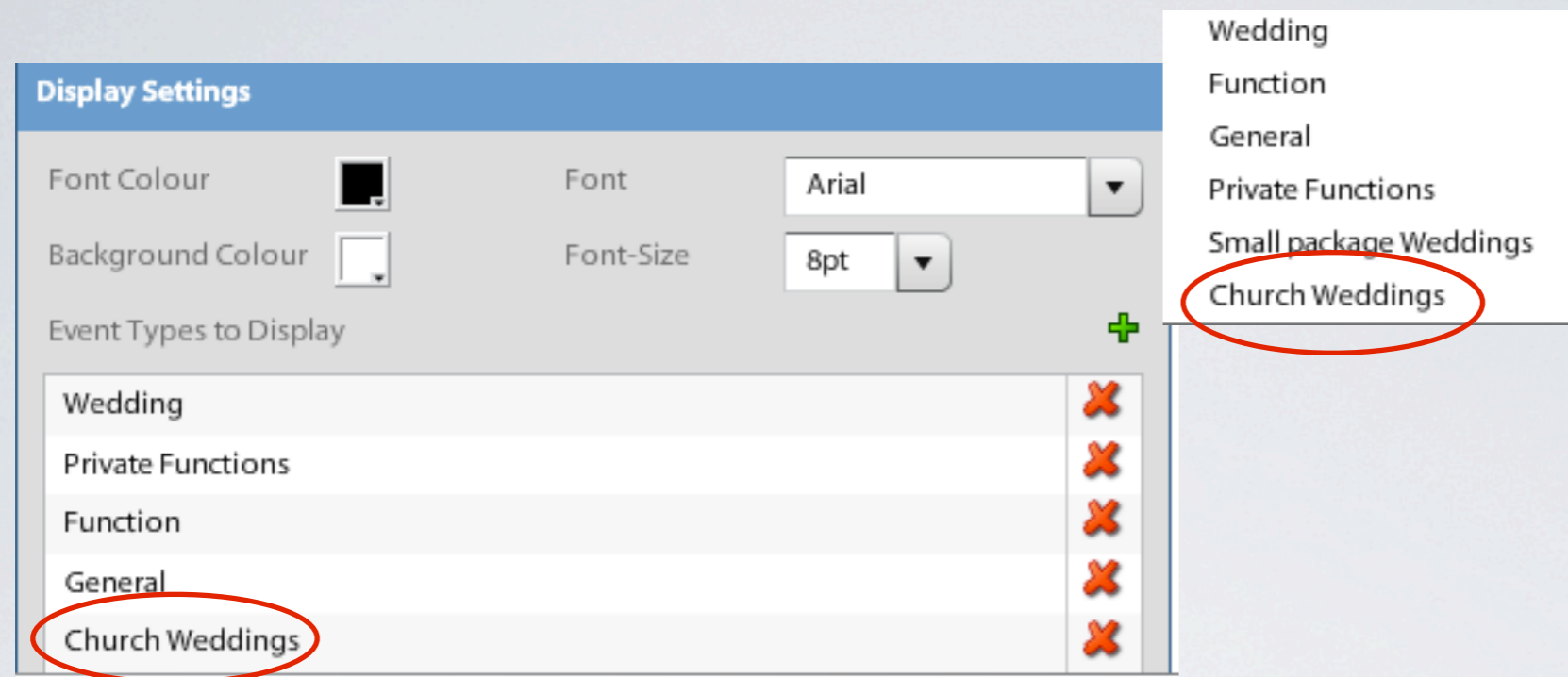
Web Address for this Enqu

<http://yourclientportal.co>

Title

Message

Response Message After W



The new event type will now be displayed at the bottom of the events listed.

To change the event list order use the red cross to remove events and then repeat the process to put them back in the correct order.

Don't forget to save

Administration

Account Details

Events

Your Event Steps

Your Web Enquiry Page

Enquiry Page

Reportable Fields

Automatic Enquiry Response

Import Data

Clients

Export Data


Clients


?


General | Email Settings | Enquiry Form Fields

<input checked="" type="radio"/> YEMDemo	X
<input type="radio"/> Wedding	X

Display Settings

Font Colour  Font Arial

Background Colour  Font-Size 8pt

Event Types to Display 

Wedding	X
Private Functions	X
Function	X
General	X
Church Weddings	X

Web Enquiry Page Accessible from the Internet?

Use this page for my Home Page New Enquiries

Enquiry page partners' checkboxes pre-selected

Web Address for this Enquiry Page

<http://yourclientportal.com.au/YEMDemo/Enquiry>

Title

Message

Response Message After Web Enquiry Is Submitted

Save

Don't forget to **save**

If you have not got a large screen you will find you have to scroll down to find the save button

Administration

Web Enquiry Page Setup Area for: YEMDemo

General | Email Settings | Enquiry Form Fields

Your available Enquiry Pages

<input checked="" type="radio"/>	YEMDemo	X
<input type="radio"/>	Wedding	X

Display Settings

Font Colour: [Color Picker] Font: Arial

Background Colour: [Color Picker] Font-Size: 8pt

Event Types to Display

Wedding	X
Private Functions	X
Function	X
General	X
Church Weddings	X

Content Settings

Web Enquiry Page Accessible from the Internet?

Use this page for my Home Page New Enquiries

Enquiry page partners' checkboxes pre-selected

Web Address for this Enquiry Page

<http://yourclientportal.com.au/YEMDemo/Enquiry>

Title

Message

Response Message After Web Enquiry Is Submitted

Then check your enquiry page
You can get there by scrolling up to the **web page icon**
or Click on the **web address**



First Name *

Last Name *

Event Type

Email Address *

Phone Number

Proposed Date

How did you hear about us?

Comment

"Your Enquiry Manager Instant Delivery System"Powered by www.yourenquirymanager.com.au

Remember after you make a change to **refresh the browser page** in order to see the changes are made correctly.

First Name *

Last Name *

Event Type

- ✓ Wedding
- Private Functions
- Function
- General
- Church Weddings

Proposed Date

How did you hear about us?
Referral

Comment

"Your Enquiry Manager Instant Delivery System"

If you want to change the order of the event types go back to
Administration/Enquiry page/Display settings

In Display settings you can use the red cross to remove events and
then repeat the process to put them back in the correct order.

*Always remember to **save** and to refresh the **browser***

- Remember after you make a change to refresh the browser page in order to see the changes are made correctly.
- Now you have chosen your event types you will find them again not only in your 'enquiry page set up' - they will be in your 'administration Event steps' where you can setup the follow up steps for each event type
- You can customise your responses to each event type, your attachment links for each event type and the handling of the booked events if you so choose

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