

Y E M
Your Enquiry Manager

Handling Enquiries
Your “Virtual Personal Assistant”

Your Enquiry Manager

“CONNECTING PEOPLE”

HANDLING ENQUIRIES THAT COME INTO VPA

- All enquiries enter VPA via the Pending Enquiries quadrant on the dashboard
- The enquiries come in from different sources and each need to be handled correctly
- With the right followup and sorting
- Handling them correctly will help when marketing to them later and will assist in follow up

LOG IN TAKES YOU TO THE DASH BOARD OF YEM WHERE YOU CAN SEE YOUR PENDING ENQUIRIES QUADRANT

The dashboard is titled "Your Enquiry Manager" and features a navigation bar with icons for Home, Calendar, Clients, Reports, Enquiries, and Setup. The main content area is divided into four quadrants:

- Upcoming Appointments:** A table with columns for Appointment and Time.
- Pending Enquiries:** A table with columns for Host, Date entered, Event type, and Client. This quadrant is circled in red. It contains the following data:

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:** A table with a column for Task.
- Overdue Tasks:** A table with a column for Task.

A left-hand sidebar titled "Common Tasks" contains links for Events (New enquiry), Search (Search clients, Search venues), and Calendar (View calendar, View team calendar, Add general task).

THE DATE OF ENQUIRY, TYPE OF EVENT AND CLIENT NAME ARE SEEN ON THE DASH BOARD

THE **HOST** COLUMN TELLS YOU WHERE THE ENQUIRY HAS COME FROM.

Pending Enquiries						
Host	Date entered	Event type	Client			
Chris Hall	29-May-2011	Wedding	Kurt Rohweder	✓	✗	
Stamford	29-May-2011	Wedding	Stacey Acheson	✓	✗	
Stamford	29-May-2011	Wedding	Theresa Lenoy	✓	✗	
Chris Hall	28-May-2011	Wedding	Jane Wilson	✓	✗	
Stamford	28-May-2011	Wedding	Jane Wilson	✓	✗	

THE PENDING ENQUIRY QUADRANT IS ONLY A HOLDING BOX - ACTION THEM AS SOON AS POSSIBLE

IF THE **PENDING ENQUIRY** HAS ARRIVED FROM YOUR OWN WEB PAGE, THE **HOST** COLUMN WILL LIST YOUR BUSINESS NAME.

IF THE ENQUIRY HAS ARRIVED FROM ANOTHER YEM BUSINESS THAT YOU PARTNER , THEN THAT BUSINESS WILL BE LISTED

Pending Enquiries						
Host	Date entered		Event type	Client		
Chris Hall	29-May-2011		Wedding	Kurt Rohweder	✓	✗
Stamford	29-May-2011		Wedding	Stacey Acheson	✓	✗
Stamford	29-May-2011		Wedding	Theresa Lenoy	✓	✗
Chris Hall	28-May-2011		Wedding	Jane Wilson	✓	✗
Stamford	28-May-2011		Wedding	Jane Wilson	✓	✗

IF THE **PENDING ENQUIRY** HAS ARRIVED FROM YOUR OWN YEM WEB ENQUIRY PAGE THE CLIENT HAS ALREADY RECEIVED YOUR AUTO RESPONSE - SIMPLY **CLICK THE TICK** AND THE CLIENT WILL APPEAR IN YOUR CALENDAR FOR FOLLOW UP AS PER YOUR CUSTOMISED FOLLOW UP PROTOCOL

Pending Enquiries							
Host	Date entered		Event type		Client		
Chris Hall	29-May-2011		Wedding		Kurt Rohweder		
Stamford	29-May-2011		Wedding		Stacey Acheson		
Stamford	29-May-2011		Wedding		Theresa Lenoy		
Chris Hall	28-May-2011		Wedding		Jane Wilson		
Stamford	28-May-2011		Wedding		Jane Wilson		

IF THE PENDING ENQUIRY HAS ARRIVED FROM AN ASSOCIATE YEM HOST, THE CLIENT HAS REQUESTED YOUR INFORMATION AND IS WAITING TO HEAR FROM YOU

CLICK ON THE ENTRY TO OPEN THE CLIENT'S WEB ENQUIRY DETAILS PANEL

Pending Enquiries						
Host	Date entered		Event type	Client		
Chris Hall	29-May-2011		Wedding	Kurt Rohweder	✓	✗
Stamford	29-May-2011		Wedding	Stacey Acheson	✓	✗
Stamford	29-May-2011		Wedding	Theresa Lenoy	✓	✗
Chris Hall	28-May-2011		Wedding	Jane Wilson	✓	✗
Stamford	28-May-2011		Wedding	Jane Wilson	✓	✗

IN THE **WEB ENQUIRY DETAILS PANEL** YOU WILL SEE THE CLIENT'S CONTACT DETAILS AND CAN DECIDE WHAT TO DO WITH THE ENQUIRY:

- **FOLLOW UP**
- **NO FOLLOW UP** - the enquiry is removed from the pending enquiry quadrant and client's details will be saved in your data base for future marketing and statistics
- **DELETE**- removes the enquiry from the pending enquiry quadrant and the details do not go into the database

Web Enquiry

Web Enquiry Details

Event Type
Wedding

Name
Mary Fletcher

Email
maryfletcher@bigpond.com

Phone
0400000000

Notes

EVENT VENUE(S) :

PROPOSED DATE :
Saturday 16 June 2012

HOW DID YOU HEAR ABOUT US :
Referral

COMMENTS OR QUESTIONS :

PARTNERS :

Calendar (C)

7 00

8 00

9 00

10 00

11 00

12 PM

1 00

2 00

3 00

4 00

5 00

Follow Up

No Follow Up

Delete Client

IF YOU CHOOSE TO CLICK FOLLOW UP THE ENQUIRY DETAILS WILL LOAD INTO YOUR CLIENT PAGE

The screenshot displays a web application interface with a modal window titled "Web Enquiry". The modal is divided into two main sections: "Web Enquiry Details" and "Calendar (Chris Hall)".

Web Enquiry Details:

- Event Type: Wedding
- Name: Jane Black
- Email: janeblack@hotmail.com
- Phone: 1234567890
- Notes:
 - EVENT VENUE(S): Custom House
 - PROPOSED DATE: Saturday 14 April 2012
 - HOW DID YOU HEAR ABOUT US: Referral from a Friend
 - COMMENTS OR QUESTIONS: can I get some information on packages

Calendar (Chris Hall): Saturday 14-Apr-2012

The calendar shows a grid of time slots from 7:00 to 5:00. The "Follow Up" button at the bottom of the modal is circled in red.

Background Interface:

- Upcoming Appointments:** You have, 46, overdue appointments.
- Pending Enquiries Table:**

Host	Date entered	Event type	Client
	13-May-2011	Wedding	Jane Black

Other visible elements include a "Close" button and a list of follow-up items at the bottom right of the screen.

CLIENT PAGE

Client

Client Details

Jane Black

(h) 1234567890

(m)

(s) Unknown

janeblack@hotmail.com

Associated Clients

General

Selected Event Details

Notes & Activities

Date	Origin	Type	Details
13-May-2011	Wedding	Note	EVENT VENUE(S) : Custom House PROPOSED DATE : Saturday 14 April 2012 HOW DID YOU HEAR ABOUT US ...
13-May-2011	Client	Email (Outgoing)	Web enquiry auto response sent

Events

Type	Status	Date	Proposed Date(s): Saturday 14 April 2012 Venue(s): Custom House
Wedding	Enquiry		

CLIENT PAGE - SELECTED EVENT DETAILS

Client

Client Details

Jane Black
(h) 1234567890 (w)
(m) (f)
(s) Unknown (d)
janeblack@hotmail.com

Associated Clients

General Selected Event Details

Notes & Activities

Date	Origin	Type
13-May-2011	Wedding	Note
13-May-2011	Client	Enquiry

General Selected Event Details

Notes & Activities

Date	Origin	Type
13-May-2011	Wedding	Note

Events

Type	Status	Date
Wedding	Enquiry	

Proposed Date(s): Saturday 14 April 2012
Venue(s): Custom House

CLIENT PAGE - SELECTED EVENT DETAILS

Client ✕

Client Details ✎

Jane Black

(h) 1234567890 (w)
 (m) (f)
 (s) Unknown (d)
janeblack@hotmail.com

General
Selected Event Details

Wedding - Enquiry -
Update This Event

Steps ✎ ✎

Active Steps

Wedding Interview	To Be Booked	Mellissa Kelland	✓	✗
Booking Confirmed	To Be Booked	Mellissa Kelland	✓	✗
Timing Plan	To Be Booked	Chris Hall	✓	✗

General
Selected Event Details

Wedding - Enquiry -

Steps ✎ ✎

Active Steps

Wedding Interview	To Be Booked	Mellissa Kelland		
Booking Confirmed	To Be Booked	Mellissa Kelland		
Timing Plan	To Be Booked	Chris Hall		
Event Shoot	To Be Booked	Chris Hall		
Album Design	To Be Booked	Chris Hall		
Order Taken	To Be Booked	Chris Hall		
Event Complete	To Be Booked	Chris Hall		












Completed Steps

Enquiry Date	Complete	13-May-2011	Mellissa Kelland	
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✎
✎
✎ ✎

Jane Black	1234567890	janeblack@hotmail.com	✗
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LISTS ALL YOUR CUSTOMISED STEPS FOR FOLLOWING UP THE CLIENT - TO SEE HOW TO SET YOUR STEPS GO TO 'SET UP'

General		Selected Event Details	
Wedding - Enquiry - 			
Steps			
▼  Active Steps			
 Wedding Interview	To Be Booked		Mellissa Kelland
 Booking Confirmed	To Be Booked		Mellissa Kelland
 Timing Plan	To Be Booked		Chris Hall
 Event Shoot	To Be Booked		Chris Hall
 Album Design	To Be Booked		Chris Hall
 Order Taken	To Be Booked		Chris Hall
 Event Complete	To Be Booked		Chris Hall
▼  Completed Steps			
 Enquiry Date	Complete	13-May-2011	Mellissa Kelland

SELECTED EVENT DETAILS LISTS:

- THE **STEP STATUS**: COMPLETED OR ACTIVE (STILL BEING ACTIVELY PURSUED)
- THE **STAFF MEMBER** DESIGNATED TO HANDLE THE STEP. THIS PERSON WILL SEE THE FOLLOW UP TASK LISTED IN THEIR YEM CALENDAR

FOLLOW UP STEPS AND INTERVALS AND TASK DELEGATION TO SPECIFIC STAFF MEMBERS IS CUSTOMISED BY YOU

IN YOUR SET UP/ADMINISTRATION

- The Pending enquiries quadrant should be reviewed and emptied regularly
- Go on to Administration / Your Event Steps to set up your follow up for specific types of enquiries
- YEM's automatic responses and reminders make it simple to stay on top of your enquiries

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