



Update a YEM Account Password  
Your “Virtual Personal Assistant”

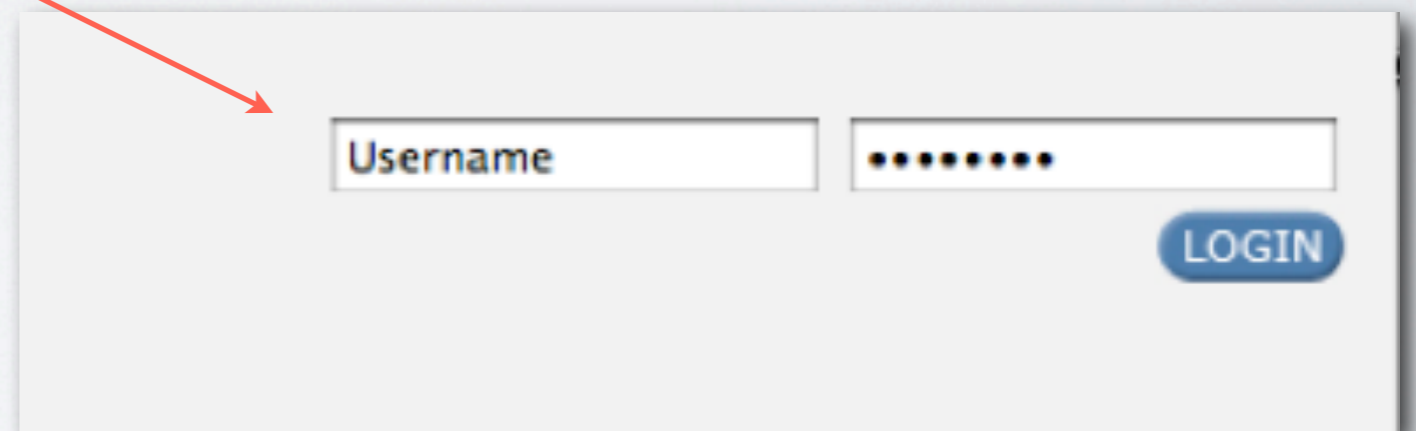
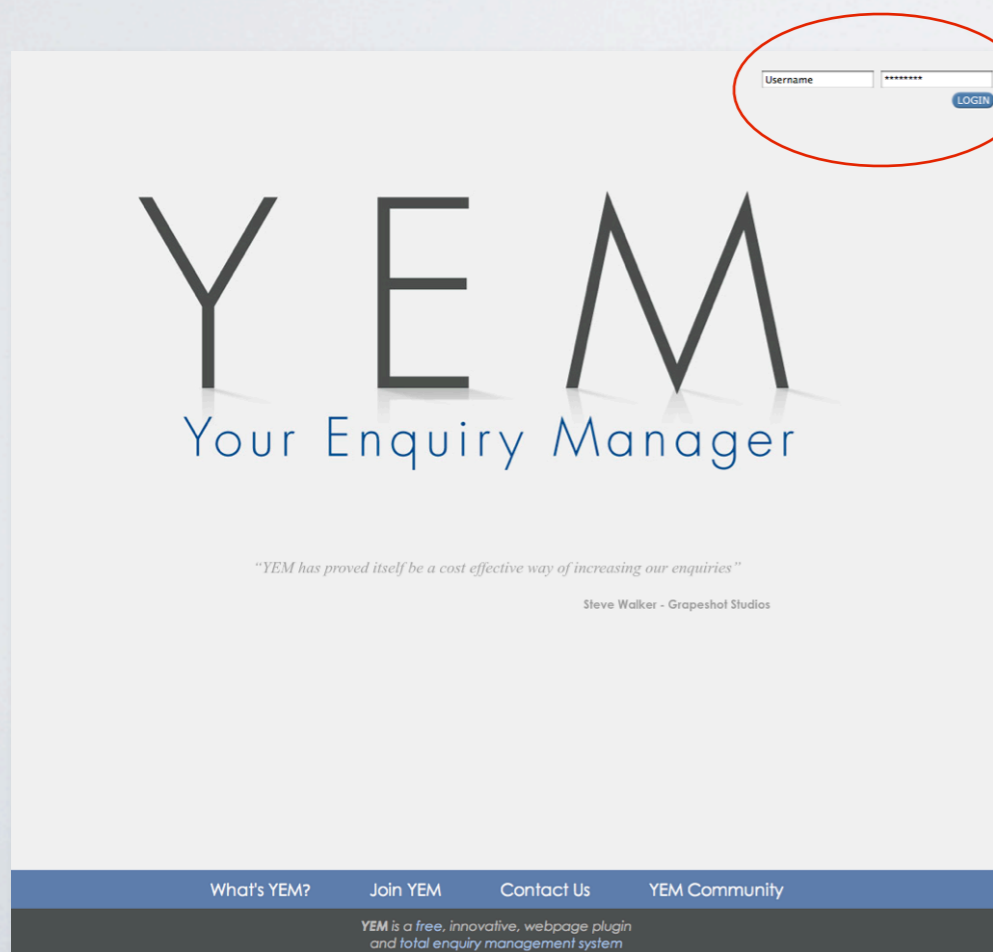
Your Enquiry Manager

*“CONNECTING PEOPLE”*

# SET YOUR UNIQUE ACCOUNT PASSWORD

- As the Administrator of your YEM account you will be sent a user name and password by YEM - use these to *log in* for the first time
- Then you should change that password to your own private, secure, unique password - it must be 6 digits long
- If you want to allow others to access your YEM account, you then go on and set them each a unique user name and password at the appropriate security level

- Firstly log in to your YEM dashboard
- Log in with the user name and password YEM has sent you
- Log in from anywhere you can get a web browser
- Simply [www.yourenquirymanager.com.au](http://www.yourenquirymanager.com.au) and logon



# AT THE YEM DASH BOARD CLICK THE **SET UP** ICON

The screenshot shows the 'Your Enquiry Manager' (YEM) dashboard. The browser address bar displays 'http://testapp.studiowebonline.com.au/Client/Default.aspx'. The navigation menu includes icons for Home, Calendar, Clients, Reports, Enquiries, and Setup. The 'Setup' icon, which is a gear, is circled in red. To the right of the navigation menu are links for Support and Logout, and the YEM logo.

**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

# TAKING YOU TO THE ADMINISTRATION PAGE

Home Calendar Clients Reports Enquiries Setup

## Your Enquiry Manager

**Administration**

**Account Details**

(Your Company Name)

Your Address  
Your Town NSW 2000

(p) 07 3367 3388  
(e) support@yourenquirymanager.com.au  
(w) www.yourenquirymanager.com.au

**Users**

Username	Name
Demo	Demo Admin

**Active Modules**

- Your Virt... This mod steps and
- Your Aut... The Auto instantly enquiries
- Your Enq Host

NEXT CLICK ON YOUR **USER NAME** TO OPEN THE USER DETAILS PANEL

IN THE USER DETAILS PANEL YOU CAN  
ENTER AND CONFIRM THE NEW  
PASSWORD YOU HAVE CHOSEN - THEN  
CLICK **SAVE**

**User Control**

**User Details**

Username  
Demo

Password  
[Empty]

Confirm Password  
[Empty]

First name: Demo      Last name: Admin

Email address  
support@yourenquirymanager.com.au

Active:       Team Calendar Filter:

**User Permissions**

<input checked="" type="checkbox"/>	Account Administrator	This user has FULL ACCESS to all areas within the software including control over other users' access.
<input type="checkbox"/>	Standard User	This user has access to the Home, Calendar, Clients & Reports areas only. This user cannot access the Administration or the YEM Community areas.
<input type="checkbox"/>	Enquiries Manager	Access to the YEM Community as well as everything a Standard User can access.
<input type="checkbox"/>	Web Enquiry Manager	This user has access to the Web Enquiry Settings ONLY. You can use this user level to give an external web designer the right to set up your YEM Web presence.

Save      Cancel

TO ADD ANOTHER USER (e.g. STAFF MEMBER or WEB DESIGNER) TO YOUR ACCOUNT  
CLICK ON THE PERSON/PLUS SIGN

Home Calendar Clients Reports Enquiries Setup

# 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**

(Your Company Name)

Your Address  
Your Town NSW 2000

(p) 07 3367 3388  
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**Users**

Username	Name
Demo	Demo Admin

**Active Modules**

- Your Virtu**  
This modu  
steps and e
- Your Auto**  
The Autom  
instantly se  
enquiries.
- Your Enqu**  
Host

THIS OPENS A BLANK USER DETAILS PANEL -  
ENTER THE USERNAME, PASSWORD AND  
PERSONAL DETAILS AND TICK ACTIVE

The screenshot shows a 'User Control' dialog box with two main sections: 'User Details' and 'User Permissions'. The 'User Details' section contains input fields for Username, Password, Confirm Password, First name, Last name, and Email address. At the bottom of this section, there are two checkboxes: 'Active' (checked) and 'Team Calendar Filter' (unchecked). The 'User Permissions' section is a table with four rows, each representing a user role with its corresponding permissions. The 'Active' checkbox in the 'User Details' section is circled in red.

User Permissions	
<input type="checkbox"/>	Account Administrator This user has FULL ACCESS to all areas within the software including control over other users' access.
<input type="checkbox"/>	Standard User This user has access to the Home, Calendar, Clients & Reports areas only. This user cannot access the Administration or the YEM Community areas.
<input type="checkbox"/>	Enquiries Manager Access to the YEM Community as well as everything a Standard User can access.
<input type="checkbox"/>	Web Enquiry Manager This user has access to the Web Enquiry Settings ONLY. You can use this user level to give an external web designer the right to set up your YEM Web presence.

When choosing a user name it is best to identify by job description, e.g. Functions manager. Then you can simply change the password if that staff member leaves and their tasks and appointments can be then be seen by the next functions manager.

DON'T FORGET TO ASSIGN A **SECURITY LEVEL** (USER PERMISSION) TO THE NEW USER AND CLICK SAVE

## User Control

### User Details

Username

dianedemo

Password

\*\*\*\*\*

Confirm Password

\*\*\*\*\*

First name

diane

Last name

smith

Email address

diane@smith.biz

Active



Team Calendar Filter



### User Permissions

<input type="checkbox"/>	Account Administrator	This user has FULL ACCESS to all areas within the software including control over other users' access.
<input type="checkbox"/>	Standard User	This user has access to the Home, Calendar, Clients & Reports areas only. This user cannot access the Administration or the YEM Community areas.
<input type="checkbox"/>	Enquiries Manager	Access to the YEM Community as well as everything a Standard User can access.
<input checked="" type="checkbox"/>	Web Enquiry Manager	This user has access to the Web Enquiry Settings ONLY. You can use this user level to give an external web designer the right to set up your YEM Web presence.

Save

Cancel

# AND TICK TEAM CALENDAR FILTER IF YOU WANT THEM TO BE VISIBLE TO YOU IN YOUR TEAM CALENDAR

**User Control**

User Details		User Permissions	
Username	<input type="text" value="dianedemo"/>	<input type="checkbox"/> Account Administrator	This user has FULL ACCESS to all areas within the software including control over other users' access.
Password	<input type="password" value="*****"/>	<input type="checkbox"/> Standard User	This user has access to the Home, Calendar, Clients & Reports areas only. This user cannot access the Administration or the YEM Community areas.
Confirm Password	<input type="password" value="*****"/>	<input type="checkbox"/> Enquiries Manager	Access to the YEM Community as well as everything a Standard User can access.
First name	<input type="text" value="diane"/>	<input checked="" type="checkbox"/> Web Enquiry Manager	This user has access to the Web Enquiry Settings ONLY. You can use this user level to give an external web designer the right to set up your YEM Web presence.
Last name	<input type="text" value="smith"/>		
Email address	<input type="text" value="diane@smith.biz"/>		
Active	<input checked="" type="checkbox"/>		
Team Calendar Filter	<input type="checkbox"/>		

SHOULD YOU NEED TO DELETE A USER AT ANY TIME SIMPLY **DE-ACTIVATE** THEM BY REMOVING THE TICK, THEN SAVE

**User Control**

**User Details**

Username:

Password:

Confirm Password:

First name:  Last name:

Email address:

Active:  Team Calendar Filter:

**User Permissions**

<input type="checkbox"/>	Account Administrator	This user has FULL ACCESS to all areas within the software including control over other users' access.
<input type="checkbox"/>	Standard User	This user has access to the Home, Calendar, Clients & Reports areas only. This user cannot access the Administration or the YEM Community areas.
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Save Cancel

YEM

Your Enquiry Manager

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Your “Virtual Personal Assistant”

Your Enquiry Manager

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