

Y E M

Your Enquiry Manager

Updating an Enquiry to
Booked Status

Your Enquiry Manager

“CONNECTING PEOPLE”

- You have a YEM enquiry page with an automatic instant response
- You have data back up,
- Follow up reminders and
- Reports and statistics on all your enquiries

- Now it's time to drive your business

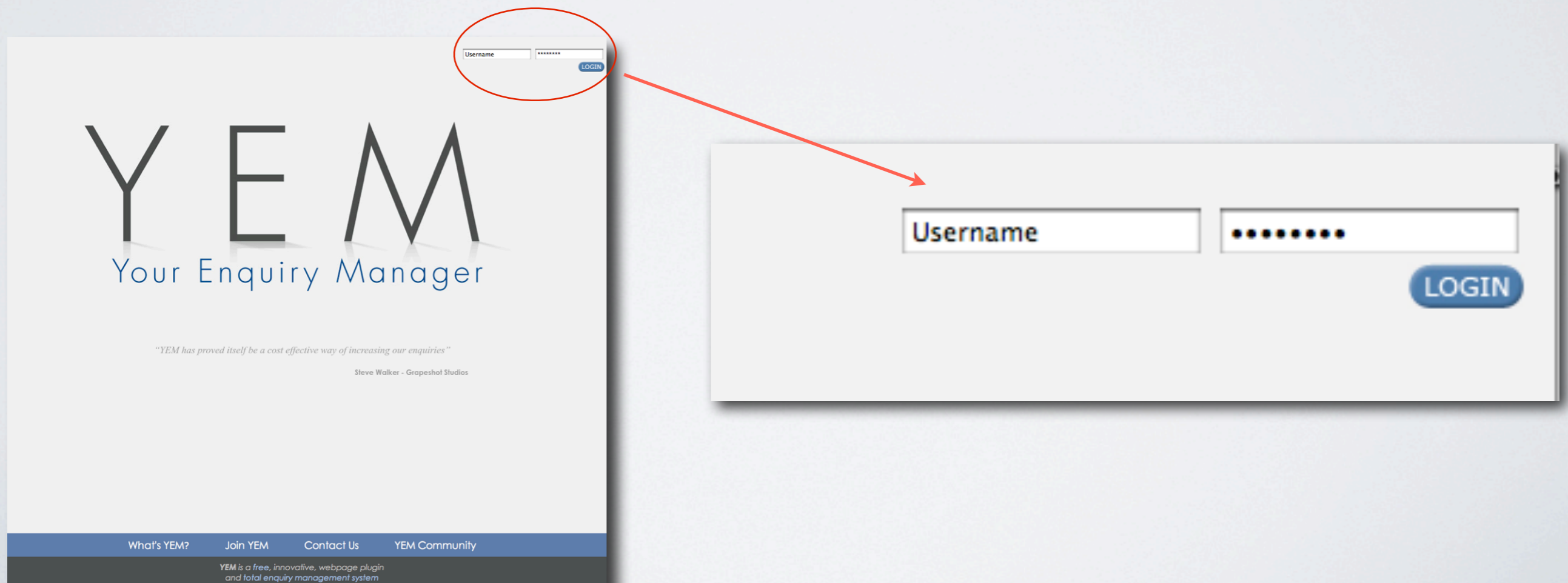
BOOKED REPORT

- The reports showing enquiries vs site visits
- Site visits vs bookings
- Where your bookings have come from and not just where your enquiries have come from
- This is what will drive your business and your marketing

BOOKED REPORT

- To get the booked report you just need to update your YEM data base when a client books
- This allows YEM to generate the next level of truly meaningful statistics and reports
- Even if you are not managing your enquiries within YEM's management system VPA - and you are just using your emails and then your own event management system, getting the booked report is easy!

- Firstly log in to your YEM dashboard
- Log in with the user name and password YEM has sent you
- Simply www.yourenquirymanager.com.au and logon



LOG IN TAKES YOU TO THE DASH BOARD OF YEM

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

CLICK ON CLIENTS IN THE ICON BAR

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** (circled in red), Reports, Enquiries, Setup

Your Enquiry Manager

Support, Logout, YEM Your Enquiry Manager

Common Tasks

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	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

CLICK ON THEIR NAME TO OPEN THEIR CLIENT DETAILS

Home Calendar Clients Reports Enquiries Setup Support Logout **YEM** Your Enquiry Manager

Your Enquiry Manager

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Clients

Client Search: Kevin Return Active Clients Only

Name	Business Name	Phone	Work	Mobile
Kevin Smith	April Showers	07 33567899		0430999888
Kevin Wellers	Bungee Brakes	07 34567835		0412345678
Kevin Zithers	Up there Umbrellas	07 38899666		0419020202

Your recently accessed Clients

CLICK ON SELECTED EVENT DETAILS

Client

Client Details

Kevin Smith
April Showers
(h) 03 34567664 (w)
(m) 0430 373737 (f)
(s) Unknown (d)
k@home.com.au
22 Albert St
Townston NSW 2456

Associated Clients

General **Selected Event Details**

Notes & Activities

Date	Origin	Type	
12-May-2011	Client	Email (Outgoing)	Web enquiry auto

Events

Type	Status	Date
Wedding	Enquiry	

THEN CLICK ON UPDATE THE EVENT

The screenshot shows a software interface with a blue header and a white main area. On the left, there is a 'Client' sidebar with 'Client Details' and 'Associated Clients' sections. The main area has two tabs: 'General' and 'Selected Event Details'. The 'Selected Event Details' tab is active, showing a 'Wedding - Enquiry -' event. Below the tabs is a 'Steps' section with a table of active steps. A red circle highlights the 'Update This Event' button in the top right corner of the main area.

Client Details

Kevin Smith
April Showers
(h) 03 34567664 (w)
(m) 0430 373737 (f)
(s) Unknown (d)
kullboma.com.au
22 Albert St
Townston NSW 2456

Associated Clients

General | **Selected Event Details**

Wedding - Enquiry -

Steps

Step	Status	Date	Assigned To	Completed	Cancelled
Enquiry Follow Up	Confirmed	04-Jul-2011	Demo Admin, Tom Smith	✓	✗
Wedding Interview	To Be Booked		Demo Admin, Tom Smith	✓	✗
Booking Confirmed	To Be Booked		Demo Admin, Tom Smith	✓	✗
Timing Plan	To Be Booked		Demo Admin, Tom Smith	✓	✗
Event Shoot	To Be Booked		Demo Admin, Tom Smith	✓	✗
Album Design	To Be Booked		Demo Admin, Tom Smith	✓	✗

Update This Event

IN QUICK EVENT STATUS FIND THE BOOKING CONFIRMED STEP CLICK THE TICK

(w)
(f)
(d)

Quick Event Status or Step Updater

Current Overall Status for this Event: Enquiry

Select from this list and click Update Event below to change this event's overall status:

Use the list and Update Event below to quickly update the date or status of individual event steps

Step	Date	Complete Steps	Cancel Steps
Enquiry Date	01-Jul-2011		
Enquiry Follow Up	04-Jul-2011	✓	✗
Wedding Interview		✓	✗
Booking Confirmed		✓	✗
Timing Plan		✓	✗
Event Shoot		✓	✗
Album Design		✓	✗
Order Taken		✓	✗
Event Complete		✓	✗
Second Wedding Interview		✓	✗

Update Event Cancel

CLICK ON UPDATE EVENT AND ANSWER **YES** TO THE CONFIRMATION QUESTION

(w)
(f)
(d)

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Enquiry Follow Up	04-Jul-2011	✓	✗
Wedding Interview		✓	✗
Booking Confirmed		✓	✗
Timing Plan		✓	✗
Event Shoot		✓	✗
Album Design		✓	✗
Order Taken		✓	✗
Event Complete		✓	✗
Second Wedding Interview		✓	✗

NOW YOUR EVENT IS UPDATED TO
BOOKED

WHEN DO I UPDATE

- You don't have to update YEM each time you make a booking
- You can update weekly or even monthly
- Simply update the clients that came in for a site visit and the clients that then booked
- This will create a new range of reports that will really assist in tracking the success of your marketing and your packages

Y E M

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