TELEMARKETING INBOUND CALLS

SALES

NEW SALE

Go to the **MAIN Telemarketing MENU** (FIGURE 1) and select **Inbound Calls.**

FIGURE 1.

The last lead that has been entered into the system will appear on your screen. You will see the leadnumber within the window at the bottom right of your screen (FIGURE 2).

FIGURE 2.

Type in the customer's phone number (you do not need to use any dashes) and press **<Enter>**. Thecomputer will search the database to see if this phone number already exists in the database. If it is a newphone number, you will see a prompt window (FIGURE 3) appear which says **"Phone# not found. Addnew lead?? *NO* YES"**. Select **YES** to add a new lead, by typing "Y".

FIGURE 3.

NOTE: If the phone number already exists in the database, the record or records attached to this phonenumber will appear on your screen. These will be explained in section .
For a new customer, a blank **TM Lead Entry Screen** will appear (FIGURE 4). The purpose of this screenis to fill in all of the basic customer information.

FIGURE 4A defines all of the fields on this screen, and describes how they are to be filled in. Alwayspress enter (not the arrow keys) after you fill in a field. When you are finished filling in the screen,always press **<F2>** to save your entries.

FIGURE 4.
FIGURE 4A.
TM Office: Telemarketing Office. Enter the code from the office that you are located inand selling from. The computer may automatically enter this for you. If so,verify as correct, and if it isn't, enter your correct office code.

Entry Date: Today's date will automatically be entered in by the computer.

CSR: Customer Service Representative. If you are logged in to the system, youremployee number and name will automatically be entered here.

Lead Source: How the customer found out about the Branson Hotline. Ask the customer andenter the correct code for this source. If you don't know the code, press<Enter> and a prompt window (FIGURE 4B) will appear asking **"Do youwish to select from the valid list? *NO* YES".** Select **YES** by typing "Y"and an alphabetical list of **Lead Sources** will appear in a "look-up" window onthe screen (FIGURE 4C). Arrow or page down to the correct **Lead Source**and its code will be listed next to it. NOTE: To get to a source faster on thelook-up window, enter the first letter of the source, i.e. if the **Lead Source** is"Repeat Customer", type "R". Your cursor will move to the first entry thatstarts with an "R". Next type the second letter of the source, "E". Yourcursor will move to the first entry that begins "RE". Next type the thirdletter, "P" and the cursor will move to the first source that begins "REP",which happens to be "Repeat Customer". When you have reached the correct**Lead Source**, press <Enter> and the correct **Lead Source** will automaticallybe filled in on the **Lead Source** field. All of the look-up windows work likethis. This is a "required" field which means it is required that you fill it in.When you save this ascreen, a prompt window (FIGURE 4D) will appear thatsays "Lead Source: INPUT REQUIRED <ANY KEY>". Hit any key andyou will return to the entry screen so that you can enter a Lead Source.

First: First name of customer and spouse. This is also a required field. You willnotice that the keyboard is upper and lower case sensitive, thus you do notneed to hold down the CapsLock key. The computer will automatically placethe upper case letters where needed. The first letter of each proper noun willautomatically be capitalized and the remainder will be in lower case. Use the"**&**" symbol between the husband and wife's names. (Hold down the shift keyand press the number 7 key.) For example, **John & Mary**. OPTION: Youcan just write the husband's name here and then type in the wife's first andlast name just below where it says **First2**.

Last: Last name of the customer. Also a required field.

Birth Date: Customer's birth date.

Occ: Customer's occupation.
First2: May be used for the wife's name or another person who is with the customer.NOTE: The computer will ONLY search the database to find a name on arecord by using the **First** field name, not **First2** field name.

Address: Type in the full street address using Avenue, Lane, Street, etc.

Country: Only fill in if not USA. If USA, leave blank and press <Enter>.

Zip: Zipcode. Enter in the correct 5-digit zip code. The computer willautomatically enter the city and state for you. (More info below.)

City: The computer normally enters this for you after you enter the zip code. Beaware that the computer generated city is the appropriate city for the postalservice based on the zip code that you entered even though your customer maysay that they live in a different city. Usually this is a city within the city thathas automatically been entered by entering the zip code. This is O.K.Sometimes, you may need to type in the full city name, e.g. Saint Louis,rather than St. Louis. Note that foreign countries have "cities" and "states"just like the U.S., even though they may be called something else. Forexample, Rome is a city in the country of Italy, and Toronto is a city in thecountry of Canada. Make sure that you put the city only in the city field.

State: Automatically filled in when you enter the zip code. See above.

Home Phone: This will already be entered.

Business Phone: Enter business phone. Make sure that the customer always gives you theirhome phone number for the Home Phone field as the home phone numberfield is the ONLY phone number the computer uses to search for the customerrecord.

Marital Status: Enter "M" for married, "S" for single, etc..

Children: Enter the number of children present, if there in person.

Credit Card: Enter "A" for American Express, "M" for Mastercard, "V" for Visa, etc. Ifthey have no credit card, enter an "X".

Household Income: This would be in thousands, and means "at least 0, 25, 30 or 55". Find outwhich is most appropriate and enter that number.

Homeowner:"Y" for yes, "N" for no.

Vacation Once Per Year:"Y" for yes, "N" for no.

Quality Code: Enter a one-digit code as provided by your management, if required.
Comment: If there is anything out of the ordinary that can not be included in any of theregular fields, this is where you can add that information, briefly.

Press **<F2>** to save all the information you have entered on the **TM Lead Entry Screen.** You willnotice that if you do no enter the **Lead Source** and the customer's first and last name, you will not beallowed to save the lead. This is called a "required" or "forced" field. You can not go past it withoutmaking an entry. When you save this screen, a highlighted box will appear on the screen that gives youthe Lead Number (FIGURE 5). Press any key to continue. A **TM Lead Edit** screen will appear. You willnotice that there is a Menu Bar in a window at the bottom of the screen. (FIGURE 6)

The purpose of the **TM Lead Edit** screen is to add or edit lead information. You will notice that there arefields set up for you to easily follow up on calling back this lead if they are not yet ready to choose orfinalize their vacation plans. When you need to get back into this screen to edit any of the customer (lead)information, you would select **Lead** on the Menu Bar by typing "L".

FIGURE 6A describes all of the fields on the **TM Lead Edit** screen that have not already been entered onthe previous screen (the **TM Lead Entry Screen)** where all of the basic customer information was entered. Figure 6B briefly defines and describes all of the selections on the Menu Bar. These selections providedirect access to the various screens and windows needed to complete a sale. Some of these selections aremore fully described in other sections of this manual.

FIGURE 6.

FIGURE 6A.
Call Date **Time**:The date and time that you spoke with the customer.

Call-Back **Time**:The date and time you wish to call back the customer.

SolicitorYour employee number.

Times Called Total number of times you have called.

Last Attempt Date of last call.

Num Attempt Number of times you tried to call on your last attempt.

FIGURE 6B.
MENU BAR SELECTIONS

The Menu Bar selections are used as follows:

QuitLeave this record.Type "Q" to escape from the current lead and go directlyto the **Find Lead** window. You can now search foranother lead by Phone Number, Lead number, Name,Survey Number (S####) or Contract Number (K####).

LeadEdit Lead InfoType "L" to go directly to the **TM Lead Edit** screen. This will allow you to edit any of the **Lead** information.

TourBook a TourType "T" to go directly to the Tour Booking window tobook a tour at one of the resorts for your customer,reschedule their tour or to edit information related toyour customer's tour.

Vac-Leg Add/Edit Vacation LegsType "V", and if no Vacation Legs have yet beenentered for this customer, you will go directly to the**SALE INFORMATION** window. If anyaccommodations and/or tickets have already beenentered, you will go directly to a window which listswhat Vacation Legs they have already purchased. Priorto typing "V", notice on the Menu Bar, that if thecustomer has already purchased a Vacation Leg therewill be a number after **Vac-Leg.** If 2 legs have alreadybeen booked, it will say **Vac-Leg2** on the menu bar.

SaleCash RegisterType "S" to go directly to the **TM Edit SaleInformation** screen. This will allow you to edit or addany information to the SALE INFORMATION, such asthe Credit Card name and number, Amount Received,etc. You would also press "S" if you wanted to add orchange the Package Program code.

Pick-Up Pick up Tickets Type "P" to go directly to the window where you wouldtype in the required information to print the ticketvouchers for the customer to pick up.

Cancel

NotesEnter Notes Type "N" to go directly to the **Notes** window. Again, ifthere are already notes for this customer record enteredinto the system, there will be a number on the next tothis selection on the Menu Bar saying how many noteshave been entered for this record by an end user.

AddlSaleAdditional Sale Type "A" if you are going to enter a new VacationPackage for an already existing customer. Typing "A"will bring you to a **TM Contact Add** screen which willcreate an additional Lead Number for this customer.There are only two times to use this: 1) If the customeris purchasing Vacation Legs for a different vacation timethan the already existing lead, and 2) If the customerwants to add tickets to an existing package, but thatpackage purchase has already been paid for, confirmedand authorized.

OutOutputType "O" to get a screen or printed report which givesyou the customer information as well as the VacationLegs the customer has purchased along with the pricesand the total cost.
After the basic lead (customer) information has been entered into the computer, you are ready to enter thesales information for the customer's vacation - what they want to buy, i.e. accommodations and showtickets. Each of these entries is called a "Vacation Leg". Select **Vac-Leg** (Vacation Leg) on the Menu Barat the bottom of your screen by typing "V". A **SALE INFORMATION** window will appear on yourscreen (FIGURE 7).

FIGURE 7.

To proceed with a sale, the fields on the **SALE INFORMATION** window need to filled in. These aredefined and described in FIGURE 7A.
FIGURE 7A.
TM Office: Telemarketing Office. The code for the location you are sellingfrom will automatically be filled in for you. Verify this ascorrect, and if not, put in the correct code for your location.

Pckg Program: Package Program. There are various types of special packagesavailable for you to sell. They all have codes. If you do notknow the correct code, type in the wrong code or just type inany letter(s) and press <Enter>, and a box will appear whichwill say **"Package ____ does not exist. Lookup? YES NO".** Select **YES** by typing "Y" and an alphabetical list of packageswill appear on your screen. Find the correct **Package Program**and move your cursor to it. The code will be next to it. Press<Enter) and this code will automatically be filled in on the**Pckg Program** field for you.

Sold by: If you are logged on to the system, your employee number andyour name will appear automatically.

Welcome Cntr: Welcome Center. Enter the code for the location where thecustomer will go to pick up their ticket vouchers.

Arrival Date: This is the date that the customer will be arriving to pick uptheir ticket vouchers.

When the above fields are filled in, press **F2** to save this information and proceed to a **Vacation Leg** entrywindow (FIGURE 8). It will automatically be set up for an accommodations entry. FIGURE 8A describesand defines all of the fields for an Accommodations (Hotel/Motel) Vacation Leg entry.

If the customer is not interested in accommodations, but in purchasing tickets only, a different VacationLeg entry window will need to be filled in. The window will automatically switch to a Show TicketVacation Leg entry window when you enter a show ticket code in the **Venue** field on the accommodationswindow, and then press <Enter>. See FIGURE 9. The fields for the Show Ticket Vacation Leg windoware described and defined in FIGURE 9A.
FIGURE 8.

FIGURE 8A.
VacNum: Vacation Number. This is the number for this specific VacationLeg. It will automatically be filled in for you after you save thisscreen.

Hotel: The computer will automatically fill this in for you.

Voucher#: This will be blank, and will only be used if you needed tohand-write a voucher, thus this would give the voucher analternate identification number for this vacation leg.

Package: Package Code. This will automatically be filled in.
Item: Enter the code for the Hotel/Motel where the customer wouldlike to stay. For example, if they will be booked at theDogwood Motel, enter that code **"DOG..."** If you don't knowthe correct code for a specific hotel or motel, type in **HOT** andpress <Enter>, and a window will appear which will say**"Premium ____ does not exist. Lookup? YES NO".** Select**YES** by typing "Y" and an alphabetical list of hotels and motelswill appear on your screen. Find the correct **Premium** andmove your cursor to it. The code will be next to it. Press<Enter> and this code will automatically be entered in the**Venue** field.

Rooms: Enter the number of rooms being booked.

Nghts: Enter the number of nights your customer will be booking.

Arrival: Enter the first night of their reservation.

#adults: Enter the number of adults that will be staying in the room(s).
#chldrn: Enter the number of children that will be staying in the room(s).Leave blank if 0.

RoomType: Enter the specific codes provided by your management, i.e.1KNS for one King bed, non-smoking.

Room Req: Enter the code provided by your management for any specificroom requirements, i.e.

PLSD for Pool Side.

Conf#: Confirmation number. This will be provided by the theaterwhen the customer's tickets are confirmed and will be typed inby whomever confrims the reservation.

ConfDate: Confirmation date. To be entered when this reservation isconfirmed.

Book-Date: Booking date. Computer will default to today's date.

Qual: The computer will automatically fill this in for you.

TourDate: Tour Date. When a tour is scheduled for this customer, thisdate will automatically be entered.
Entry: The entry date and the employee # and name of the person whowas logged in and entered this Vacation Leg information willautomatically be filled in.

Sold: The entry date and the employee # and name of the person whosold this Vacation Leg will automatically be filled in.

PckUp: This will automatically be filled in with the date this VacationLeg was Sold, and with the Employee Number and Name forthe employee who sold this Vacation Leg.

Cancel:

Comment: Enter anything out of the ordinary that can not be included inone of the regular fields.

Amt Rcvd: The Amount Received will automatically be displayed here whenthis amount is filled in on the Sale Information Entry Screen.

Due Venue: The amount due to Venue will automatically be filled in here.

Paid Venue: The amount paid the Venue will automatically be filled in here.

FIGURE 9.
FIGURE 9A.
VacNum: Vacation Number. This is the number for this specific VacationLeg. It will automatically be filled in for you after you save thisscreen.

Venue: This will automatically be filled in when you type in the showticket code in the Ticket field along with the theater'sreservations phone number, and fax number, if available.

Package: Package Code. This will automatically be filled in.

Ticket: Enter the code for the Show Ticket the customer would like tosee. For example, if they would like to see Jimmy Stafford, thecode is JSA, thus type in "**JSA**" and press <Enter>. If youdon't know the correct code for a specific show ticket, type in**TIX** and press <Enter>, and a window will appear which willsay **"Premium _____ does not exist. Lookup? YES NO".** Select **YES** by typing "Y" and an alphabetical list of availableshow tickets will appear on your screen. Find the correct**Premium** and move your cursor to it. The code will be next toit. Press <Enter> and this code will automatically be enteredin the **Ticket** field. You will notice that the Theaterinformation, the phone number for the Theater and the SellingPrice for a ticket for this show will automatically appear on thescreen after you enter the show ticket code.

A:Adults. Enter the number of adults attending.

C:Children. Enter the number of children attending.

Qty: Quantity. Enter the total number of tickets needed for a specificshow (on a specific date at a specific time.) This should includenumber of adults and children.
Day: Day of show. Enter the date that your customer would like togo to the show.

Time: Enter the time of the show. Just enter the 8A or 8P and thecomputer will standarize it to 08:00AM or 08:00PM, etc..

Special Requirements: Such as "aisle", or "Wheelchair", etc.

Price: The cost for one ticket for this show at the appropriate price forthe Package Code entered will be automatically filled in thisfield when the show ticket code is entered. Note: This amountwill automatically change when the quantity of tickets or thePackage Code is changed.
Xtra:

Voucher#: This will be blank, and will only be used if you needed tohand-write a voucher, thus this would give the voucher analternate identification number for this vacation leg.

Conf#: Confirmation number. This will be provided by the theater whenthe customer's tickets are confirmed, and will be typed in at thattime.

ConfDate: Confirmation date. To be entered when this reservation isconfirmed.

Book-Date: Booking date. Computer will default to today's date.

Qual: Qualified. The computer will automatically enter this.

TourDate: Tour Date. When a tour is scheduled for this customer, thisdate will automatically be entered.

Entry: The entry date and the employee # and name of the person whois logged in and enters this Vacation Leg information willautomatically be filled in.

Sold: The entry date and the employee # and name of the person whosold this Vacation Leg will automatically be filled in.

PckUp: Pick Up Date, and Employee Number and Name whom thevouchers were picked up from. Will automatically be filled inwhen tickets are picked up.
Cancel:

Comment: Enter anything out of the ordinary that can not be included inany of the regular fields.

Amt Rcvd: The Amount Received will autmatically

Due Venue:

Paid Venue:

Emp:

After a Vacation Leg is filled in, save this information by pressing **F2**. This will bring you back to theMenu Bar. If you have another Vacation Leg to enter, type "V". A window, FIGURE 10, will appear onyour screen. It will have a listing of all Vacation Legs that have already been entered and saved. Includedwill be the venue, date booked, arrival date, cost of the venue, total cost of the package, quantity of nightsor tickets, number of rooms and the Package Code that was entered.

To add a new vacation leg, highlight **ADD NEW VACATION** and press <Enter>.

To change the Package Program Code, arrow down to highlight **Change Package Code** and press<Enter>. The original SALE INFORMATION window will appear. Type in the new package ProgramCode and save this by pressing **F2**. You will then return to the ADD NEW VACATION window.

When all Vacation Legs have been entered for the customer, prices adjusted if necessary and all legs saved,you are ready to go into the "cash register", which is the **SALE** selection on the Menu Bar. Type "S" andyou will see the **TM Sale Information** screen appear (FIGURE 11). The fields for this screen aredescribed and defined in FIGURE 11A.

FIGURE 11.

FIGURE 11A.
There are five sections of information on this screen. The top section is the contains the lead info that hasalready been entered. The other sections are described and defined below.

SALE INFORMATION
Sale: The sale date must be entered here. This is a required field.

Pckg Program: This will already be entered.

Pckg Cost: This is the total cost of the legs entered. It will be enteredautomatically.

CC Name: If customer is paying by credit card and the name on the card isdifferent than the customer's, enter the name listed on the cardhere.

Accnt: Credit Card Account Number.

Exp: Credit Card expiration date. Enter digits, i.e. 0497.

Addl Date: If the customer is not paying the total, enter the date of the nextpayment.
Sold by: This will already be entered.

APPROVAL INFORMATION
Approved: The date that the money, check or credit card, etc. has beenapproved.

Auth#: Authorization number, if it was a credit card transaction.

Batch#: Pertains to credit card approvals.

Paid: The date the money was actually paid.

Wire#: Pertains to credit card approvals

Ver: Verified? Y or N.

Tape: Pertains to credit card approvals

CANCEL/DECLINE INFORMATION
Cancel: Cancellation Date.

Cancel$: Cancellation Amount.

Refund$: Refund Amount.

Refund Date: Date of Refund.

Status: Status of the customer record: A = Active.
X = Cancelled.

Date: Date of ???

PAYROLL INFORMATION
Sold by: This has already been entered.

Commsn: This will automatically be handled by your payroll officer'semployee records.

Paid: Date the commission was paid. Again handled by your payrollofficer.

TO:"Take Over's" employee number. This is a manager or othersales person that may tag or take over this sale.
Commsn: As above.

Paid: As above.

Manager: Manager's employee number

Commsn: As above.

When the sale is complete along with the financial and other approvals as well as the confirmationinformation entered by the appropriate management personnel, the tickets are ready to be picked up at thedesignated Welcome Center that has been indicated. The personnel at these Welcome Centers will greetthe customer's and ask them their phone number in order to pull their record up on their computer screen. They will verify their name and the information on the ADD VACATION LEG screen as it compares tothe customer's confirmation letter, and then use the **Pick Up** selection on the Menu Bar in order to confirmthat each leg of the customer's vacation is being picked up and then the customer's ticket vouchers willautomatically be printed out at the Welcome Center.