

# 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 lead number 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>. The computer will search the database to see if this phone number already exists in the database. If it is a new phone number, you will see a prompt window (FIGURE 3) appear which says "**Phone# not found. Add new 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 phone number 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 screen is 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. Always press 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 in and 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, your employee number and name will automatically be entered here.

**Lead Source:**

How the customer found out about the Branson Hotline. Ask the customer and enter 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 you wish 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 on the 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 the look-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 that starts with an "R". Next type the second letter of the source, "E". Your cursor will move to the first entry that begins "RE". Next type the third letter, "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 automatically be filled in on the **Lead Source** field. All of the look-up windows work like this. 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 that says "Lead Source: INPUT REQUIRED <ANY KEY>". Hit any key and you 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 will notice that the keyboard is upper and lower case sensitive, thus you do not need to hold down the CapsLock key. The computer will automatically place the upper case letters where needed. The first letter of each proper noun will automatically be capitalized and the remainder will be in lower case. Use the "&" symbol between the husband and wife's names. (Hold down the shift key and press the number 7 key.) For example, **John & Mary**. OPTION: You can just write the husband's name here and then type in the wife's first and last 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 a record 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 will automatically enter the city and state for you. (More info below.)

**City:** The computer normally enters this for you after you enter the zip code. Be aware that the computer generated city is the appropriate city for the postal service based on the zip code that you entered even though your customer may say that they live in a different city. Usually this is a city within the city that has 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. For example, Rome is a city in the country of Italy, and Toronto is a city in the country 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 their home phone number for the Home Phone field as the home phone number field is the ONLY phone number the computer uses to search for the customer record.

**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. If they have no credit card, enter an "X".

**Household Income:** This would be in thousands, and means "at least 0, 25, 30 or 55". Find out which 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 the regular 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 will notice that if you do not enter the **Lead Source** and the customer's first and last name, you will not be allowed to save the lead. This is called a "required" or "forced" field. You can not go past it without making an entry. When you save this screen, a highlighted box will appear on the screen that gives you the Lead Number (FIGURE 5). Press any key to continue. A **TM Lead Edit** screen will appear. You will notice 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 are fields set up for you to easily follow up on calling back this lead if they are not yet ready to choose or finalize 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 on the 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 provide direct access to the various screens and windows needed to complete a sale. Some of these selections are more fully described in other sections of this manual.

FIGURE 6.

FIGURE 6A.

<b>Call Date</b>	<b>Time:</b>	The date and time that you spoke with the customer.
<b>Call-Back</b>	<b>Time:</b>	The date and time you wish to call back the customer.
<b>Solicitor</b>		Your employee number.
<b>Times Called</b>		Total number of times you have called.
<b>Last Attempt</b>		Date of last call.
<b>Num Attempt</b>		Number of times you tried to call on your last attempt.

FIGURE 6B.

**MENU BAR SELECTIONS**

The Menu Bar selections are used as follows:

<b>Quit</b>	Leave this record.	Type "Q" to escape from the current lead and go directly to the <b>Find Lead</b> window. You can now search for another lead by Phone Number, Lead number, Name, Survey Number (S#####) or Contract Number (K#####).
<b>Lead</b>	Edit Lead Info	Type "L" to go directly to the <b>TM Lead Edit</b> screen. This will allow you to edit any of the <b>Lead</b> information.
<b>Tour</b>	Book a Tour	Type "T" to go directly to the Tour Booking window to book a tour at one of the resorts for your customer, reschedule their tour or to edit information related to your customer's tour.
<b>Vac-Leg</b>	Add/Edit Vacation Legs	Type "V", and if no Vacation Legs have yet been entered for this customer, you will go directly to the <b>SALE INFORMATION</b> window. If any accommodations and/or tickets have already been entered, you will go directly to a window which lists what Vacation Legs they have already purchased. Prior to typing "V", notice on the Menu Bar, that if the customer has already purchased a Vacation Leg there will be a number after <b>Vac-Leg</b> . If 2 legs have already been booked, it will say <b>Vac-Leg2</b> on the menu bar.

<b>Sale</b>	Cash Register	Type "S" to go directly to the <b>TM Edit Sale Information</b> screen. This will allow you to edit or add any information to the SALE INFORMATION, such as the Credit Card name and number, Amount Received, etc. You would also press "S" if you wanted to add or change the Package Program code.
<b>Pick-Up</b>	Pick up Tickets	Type "P" to go directly to the window where you would type in the required information to print the ticket vouchers for the customer to pick up.
<b>Cancel</b>		
<b>Notes</b>	Enter Notes	Type "N" to go directly to the <b>Notes</b> window. Again, if there are already notes for this customer record entered into the system, there will be a number on the next to this selection on the Menu Bar saying how many notes have been entered for this record by an end user.
<b>AddSale</b>	Additional Sale	Type "A" if you are going to enter a new Vacation Package for an already existing customer. Typing "A" will bring you to a <b>TM Contact Add</b> screen which will create an additional Lead Number for this customer. There are only two times to use this: 1) If the customer is purchasing Vacation Legs for a different vacation time than the already existing lead, and 2) If the customer wants to add tickets to an existing package, but that package purchase has already been paid for, confirmed and authorized.
<b>Out</b>	Output	Type "O" to get a screen or printed report which gives you the customer information as well as the Vacation Legs the customer has purchased along with the prices and the total cost.

After the basic lead (customer) information has been entered into the computer, you are ready to enter the sales information for the customer's vacation - what they want to buy, i.e. accommodations and show tickets. Each of these entries is called a "Vacation Leg". Select **Vac-Leg** (Vacation Leg) on the Menu Bar at the bottom of your screen by typing "V". A **SALE INFORMATION** window will appear on your screen (FIGURE 7).

FIGURE 7.

To proceed with a sale, the fields on the **SALE INFORMATION** window need to be filled in. These are defined and described in FIGURE 7A.

FIGURE 7A.

**TM Office:**

Telemarketing Office. The code for the location you are selling from will automatically be filled in for you. Verify this as correct, and if not, put in the correct code for your location.

**Pckg Program:**

Package Program. There are various types of special packages available for you to sell. They all have codes. If you do not know the correct code, type in the wrong code or just type in any letter(s) and press <Enter>, and a box will appear which will say "**Package \_\_\_\_ does not exist. Lookup? YES NO**". Select **YES** by typing "Y" and an alphabetical list of packages will 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 and your name will appear automatically.

**Welcome Cntr:**

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

**Arrival Date:**

This is the date that the customer will be arriving to pick up their ticket vouchers.

When the above fields are filled in, press **F2** to save this information and proceed to a **Vacation Leg** entry window (FIGURE 8). It will automatically be set up for an accommodations entry. FIGURE 8A describes and 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 Vacation Leg entry window will need to be filled in. The window will automatically switch to a Show Ticket Vacation Leg entry window when you enter a show ticket code in the **Venue** field on the accommodations window, and then press <Enter>. See FIGURE 9. The fields for the Show Ticket Vacation Leg window are described and defined in FIGURE 9A.

FIGURE 8.

FIGURE 8A.

**VacNum:**

Vacation Number. This is the number for this specific Vacation Leg. It will automatically be filled in for you after you save this screen.

**Hotel:**

The computer will automatically fill this in for you.

**Voucher#:**

This will be blank, and will only be used if you needed to hand-write a voucher, thus this would give the voucher an

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File Edit Options Help

TM Edit Sale Information 910254 02/02/2002 Sys:03/17/2003 11:39 james

TM-Office MN Lead Source OR Owner Referral CSR: 0

Lois Henley B.Date

5329 Camp Betty Hastings Rd B.Date

Country: ZIP.: 27051

City.... Walker Town State: NC

HomePhone: 336-595-7085 Bus.Phone

Comment

SALE INFORMATION

Sale...: 02/22/2002 Pckg Program POP Owner Program 3nt MB(2rooms)

Pckg Cost 50.00 CC Name Acct Exp

Amt Rcvd 50.00 Addl Date PickUp at MB on

Exp.Date:

APPROVAL INFORMATION

Approved: Auth# 0 Tracking# 0

Paid : 02/21/2002 Wire# 0 Ver: \_ Tape:

CANCEL/DECLINE INFORMATION

Cancel Cancel\$: 0 Rfnd Date

Decline Refund\$: 0.00 Status A Date 02/22/2002

PAYROLL INFORMATION

Sold by .... 10777 No Number, Tele Commsn 0.00 Paid

Quit Lead Tour Vac-Leg1 \$ Sale PickUp Cancel Notes AddlSale Out

alternate identification number for this vacation leg.

**Package:  
Item:**

Package Code. This will automatically be filled in.  
Enter the code for the Hotel/Motel where the customer would like to stay. For example, if they will be booked at the Dogwood Motel, enter that code "DOG..." If you don't know the correct code for a specific hotel or motel, type in **HOT** and press <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 motels will appear on your screen. Find the correct **Premium** and move 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 specific room requirements, i.e. PLSD for Pool Side.

**Conf#:** Confirmation number. This will be provided by the theater when the customer's tickets are confirmed and will be typed in by whomever confirms the reservation.

**ConfDate:** Confirmation date. To be entered when this reservation is confirmed.

**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, this date will automatically be entered.

**Entry:** The entry date and the employee # and name of the person who was logged in and entered this Vacation Leg information will automatically be filled in.

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

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

**Cancel:**

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

**Amt Rcvd:**

The Amount Received will automatically be displayed here when this 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.

<b>VacNum:</b>	Vacation Number. This is the number for this specific Vacation Leg. It will automatically be filled in for you after you save this screen.
<b>Venue:</b>	This will automatically be filled in when you type in the show ticket code in the Ticket field along with the theater's reservations phone number, and fax number, if available.
<b>Package:</b>	Package Code. This will automatically be filled in.
<b>Ticket:</b>	Enter the code for the Show Ticket the customer would like to see. For example, if they would like to see Jimmy Stafford, the code is JSA, thus type in "JSA" and press <Enter>. If you don't know the correct code for a specific show ticket, type in <b>TIX</b> and press <Enter>, and a window will appear which will say " <b>Premium ____ does not exist. Lookup? YES NO</b> ". Select <b>YES</b> by typing "Y" and an alphabetical list of available show tickets will appear on your screen. Find the correct <b>Premium</b> and move your cursor to it. The code will be next to it. Press <Enter> and this code will automatically be entered in the <b>Ticket</b> field. You will notice that the Theater information, the phone number for the Theater and the Selling Price for a ticket for this show will automatically appear on the screen after you enter the show ticket code.
<b>A:</b>	Adults. Enter the number of adults attending.
<b>C:</b>	Children. Enter the number of children attending.
<b>Qty:</b>	Quantity. Enter the total number of tickets needed for a specific show (on a specific date at a specific time.) This should include number of adults and children.
<b>Day:</b>	Day of show. Enter the date that your customer would like to go to the show.
<b>Time:</b>	Enter the time of the show. Just enter the 8A or 8P and the computer will standarize it to 08:00AM or 08:00PM, etc..
<b>Special Requirements:</b>	Such as "aisle", or "Wheelchair", etc.
<b>Price:</b>	The cost for one ticket for this show at the appropriate price for the Package Code entered will be automatically filled in this field when the show ticket code is entered. Note: This amount

will automatically change when the quantity of tickets or the Package Code is changed.

**Xtra:**

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

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

**ConfDate:** Confirmation date. To be entered when this reservation is confirmed.

**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, this date will automatically be entered.

**Entry:** The entry date and the employee # and name of the person who is logged in and enters this Vacation Leg information will automatically be filled in.

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

**PckUp:** Pick Up Date, and Employee Number and Name whom the vouchers were picked up from. Will automatically be filled in when tickets are picked up.

**Cancel:**

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

**Amt Rcvd:** The Amount Received will automatically

Due Venue:

Paid Venue:

Emp:

After a Vacation Leg is filled in, save this information by pressing **F2**. This will bring you back to the Menu Bar. If you have another Vacation Leg to enter, type "V". A window, FIGURE 10, will appear on your screen. It will have a listing of all Vacation Legs that have already been entered and saved. Included will be the venue, date booked, arrival date, cost of the venue, total cost of the package, quantity of nights or 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 Program Code 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" and you will see the **TM Sale Information** screen appear (FIGURE 11). The fields for this screen are described 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 has already 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 entered automatically.

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

**Acct:** 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 next payment.

**Sold by:** This will already be entered.

### **APPROVAL INFORMATION**

**Approved:** The date that the money, check or credit card, etc. has been approved.

**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**

<b>Sold by:</b>	This has already been entered.
<b>Commsn:</b>	This will automatically be handled by your payroll officer's employee records.
<b>Paid:</b>	Date the commission was paid. Again handled by your payroll officer.
<b>TO:</b>	"Take Over's" employee number. This is a manager or other sales person that may tag or take over this sale.
<b>Commsn:</b>	As above.
<b>Paid:</b>	As above.
<b>Manager:</b>	Manager's employee number
<b>Commsn:</b>	As above.

When the sale is complete along with the financial and other approvals as well as the confirmation information entered by the appropriate management personnel, the tickets are ready to be picked up at the designated Welcome Center that has been indicated. The personnel at these Welcome Centers will greet the 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 to the customer's confirmation letter, and then use the **Pick Up** selection on the Menu Bar in order to confirm that each leg of the customer's vacation is being picked up and then the customer's ticket vouchers will automatically be printed out at the Welcome Center.