



OTC Learning Guides

Search, Look-up Customer Profiles and Add New Contacts

TRAVEL SCIENCES, INC.

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Introduction

This Learning Guide will teach you how to (i) search for contacts, (ii) look-up and access a customer contact, and (iii) profile add new contacts to your database.

Here's a Shocker...We're Not Perfect!

We know you're crushed and disappointed. But, "open" means being honest too. This Learning Guide is not intended to be an exhaustive review of all the functions available in OpenTravel CRM™ ("OTC"). Also, this Guide may not always be up to date and show the most current version of OTC. OTC is a dynamic and changing solution where community inputs and needs will be implemented from time to time to. Finally, we do make a mistake on a rare occasion. O.k., maybe even more frequently than that, but we try not to. So, please excuse any errors, omission or inconsistencies that may exist. If you find any errors or problems, or if something just doesn't help, please drop us a note. We will try and fix them. You can contact us at fixyourmanuals@opentravelcrm.com.

Liability for Errors & Omissions

Unfortunately, we live in a world where some believe litigation is a way of life (excluding you and us of course). So, for those litigious people out there, we disclaim all warranties of any kind, including the suitability of this Guide for a particular purpose, the completeness or accuracy of this Guide and any other crazy theory of detrimental reliance, implied representation, or whatever your creative lawyer may come up with. This Guide is made available to you AS IS WITH ALL FAULTS.

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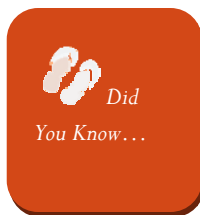
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Use & Style Conventions

We have tried to provide some consistent styles and methods to make things easier to understand and identify. So, here are few things you'll see:

<Buttons and Icons> - Button and Icons in the application which can be clicked are highlighted in this lovely burnt orange color and also are surrounded by sharp parentheses < >. The name of the icon or button will be listed inside the parentheses. Example, **<Save>** means look for the Save Button.

[Tabs and Pages] – Tabs and Pages within the applications, such as the Tabs in the OTC Navigation Bar are also highlighted in our lovely burnt orange color and are surrounded by square brackets []. The name of the Tab or page is listed inside the brackets. Example, **[My Tools]** refers to the My Tools Tab located in the Navigation Bar.



Did you know boxes are friendly little factoids about OTC.



COOL FEATURE

These little icons point out some really cool features you can find in OTC.

1. Basic Principles of OTC Search and Adding

Once you understand the basic principles of OTC searching and adding, using the system becomes very easy. In OTC, before you can add any new contact record, you must conduct a search. If your search does not return a record match, then you can add a new record.

“Why do I have to search first? I just want to add a contact, don’t hassle me with that.”



to the same person (which tells your customer you really don’t know them at all and don’t care – we call that “Contact Repulsion and Alienation Processing (CRAP). It also messes up your ability to find important customer information because it may stored in different place. This results in CRAP customer service. In summary, it messes up a lot of things which creates more work for you.

Answer: Duplicate contacts are bad...very bad...very, very bad. Did we mention they are bad? Ok. You get the idea. If you already use an older contact system you know that. It messes up your marketing efforts, because you send duplicates

2. Searching for a Contact

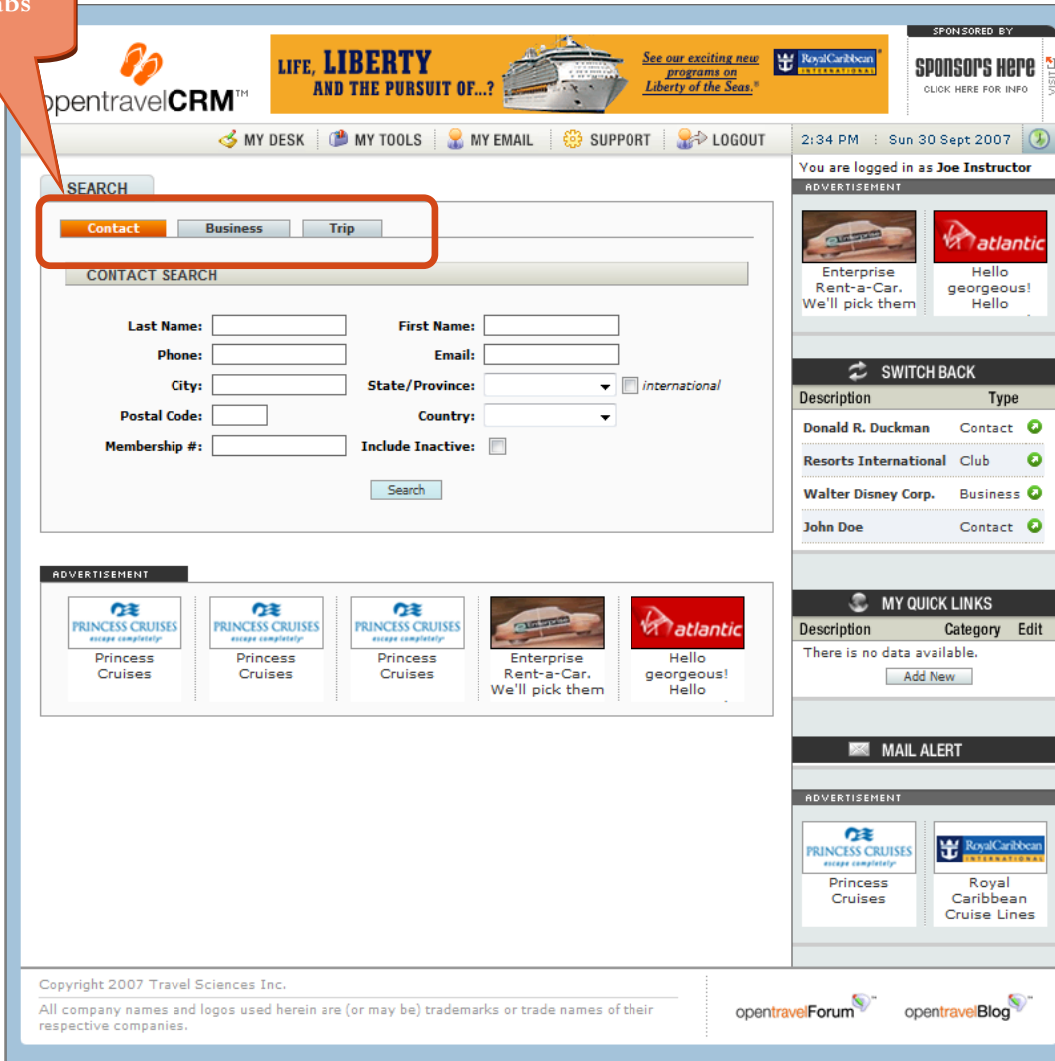
Searching for a contact in OTC is simple from anywhere in the application. Start a search as follows:

1. **Start** - Select the **<MY TOOLS >** TAB
2. **Go to Search Utility** - Click the **[Contact Search]** ICON under the.



3. **Contact Search Tab** - After clicking [Contact Search], you will be brought to a “Search” page. You will see three (3) Page Tabs: [**Contact**], [**Business**], and [**Trip**]. Please note that the page opens with the [**Contact**] tab open. The three search tabs perform searches for different information, giving you powerful searching capabilities.

3 Search Tabs



[**Contact**] - enables searching of customer contact records for individuals. Search criteria include:

- Name
- phone number
- City, State and Country
- Postal Code
- Membership I.D. – If your organization has a membership program feature, OTC handles it!

 *Did You Know...*

OTC handles memberships.



Did You Know....

OTC handles groups!

[Business] - enables searching for business entities, including suppliers, travel partners, groups, business customers and more.

[Trips] - enables searching by itinerary #s, destinations, dates, and passenger names.

4. Enter Search Information - Next, enter the information that is available for your contact, such as a last name. Please note you can enter only a few letters of the name and OTC will search for all matching names. Click the **<Search>** Button.

Part of Last Name & City Info Entered

Click Search Button



Did You Know....

OTC is an advanced customer relationship management technology that tracks all kinds of relationships that people have. It tracks passenger relationships, business relationships and family relationships.

5. **Search Returned** – OTC will search the database for any customer records that match your search criteria. The closest matches will be returned first.

The screenshot shows the opentravelCRM interface. At the top, there are navigation tabs: MY DESK, MY TOOLS, MY EMAIL, SUPPORT, and LOGOUT. The date is Sun 30 Sept 2007. The user is logged in as Joe Instructor. The search results are displayed in a table:

Name	Address	City	State	Country	Membership
Duckman, Donald R.	12 Main Street	ORLANDO	FL	US	

Below the table are buttons for 'Add New', 'Search Prospects', 'Search Again', 'Take Message', and 'Export To Excel'. The right sidebar shows a list of contacts:

Description	Type
Donald R. Duckman	Contact
Resorts International	Club
Walter Disney Corp.	Business

6. **Select Matching Record** – If you find a match, click on the <name> of the matching record. The Customer's profile will be returned.

The screenshot shows the customer profile for Donald R. Duckman. The page is divided into several sections:

- Personal Information:** Nickname: Donny, Address: 12 Main Street, ORLANDO, FL 32801, Main Phone: 1-111-555-1212 (Home), E-Mail: dduck@opentravelcrm.com, IM: Send: dizzyduck an IM, Check Status (mouse over) AIM.
- Membership:** A row of icons representing different services: AIR, HOTEL, CAR, CRUISE, TOUR, ACTIVITIES, RAIL, INSURANCE, FEES, GALILEO.
- Notes:** A table with columns: Notes, Category, User, Created. One note is visible: "Spoke with Donald. He is interested in getting away Minnie. Looking for a possible cruise." Category: Phone Call, User: Joe Instructor, Created: 9/30/2007 7:20:13 PM.
- Advertisements:** Several ads for Princess Cruises, Enterprise Rent-a-Car, and Atlantic.

3. Add a New Contact

Adding a new contact is simple. Once a search is executed and you do not see a record that matches your contact search, you can add the new contact by clicking the **<Add New>** Button at the bottom of the search return page.

1. **Click Add New Button** – assuming your does not exist in the database; click the **<Add New>** Button at the bottom of the search results page to start adding a new contact record.

The screenshot shows the opentravelCRM interface. At the top, there's a navigation bar with 'MY DESK', 'MY TOOLS', 'MY EMAIL', 'SUPPORT', and 'LOGOUT'. Below that, a search bar is visible. The main content area displays search results for 'Duckman, Donald R.' with the address '12 Main Street, ORLANDO FL US'. An orange arrow labeled 'Click' points to the 'Add New' button located below the search results. The right sidebar contains a 'SPONSORED BY' section with 'Carnival' and 'Sponsors Here', and a list of contact types including 'Donald R. Duckman', 'Resorts International', and 'Walter Disney Corp.'.

2. **New Contact Page** – You will be brought to the **[New Contact]** Page. Enter your new contact information into the data fields.

The screenshot shows the 'ADD NEW CONTACT' page in opentravelCRM. The page is divided into two main sections: 'PERSONAL' and 'HOME ADDRESS'. The 'PERSONAL' section includes fields for Prefix, First Name (Sally), Middle Name, Last Name (Ducworth), Suffix, Nickname, Sex (M/F), Date of Birth, Business Title, Contact Type (Customer), and an Inactive checkbox. The 'HOME ADDRESS' section includes fields for Address, Addr. 2, Postal Code, City, State, Country (United States), Phone, Email, and IM. There is also an 'AFFILIATIONS' section with an 'Assign' button. The page also features a navigation bar with 'MY DESK', 'MY TOOLS', 'MY EMAIL', 'SUPPORT', and 'LOGOUT'. The right sidebar contains a 'SPONSORED BY' section with 'Carnival' and 'Sponsors Here', and a list of contact types including 'Nguyen Duc Minh', 'Donald R. Duckman', 'Resorts International', 'Walter Disney Corp.', and 'John Doe'.

Key Concepts:

Required Fields –Required fields are in **red** font. In order to save a new contact, required fields must be completed.

Multiple Phone Numbers, Email Addresses, and IM Identities – Multiple phone number and email types can be entered. Simply save the record with the contact information and the first telephone entry and a green <+> Button will show up and as many entries as you desire can be added successively.

Assign Affiliations – You can assign new contacts to existing or new affiliations, such as businesses, groups and other entity types.

ADD NEW CONTACT

PERSONAL

Prefix:

First Name: Sally

Middle Name:

Last Name: Ducworth

Suffix:

Nickname:

Sex: M F

Date of Birth: No Date

Business Title:

Contact Type: Customer

Inactive:

AFFILIATIONS

There is no data available.

HOME ADDRESS

Address: 41 battery Drive

Addr. 2:

Postal Code: 02103

City: BOSTON

State: MA - Massachi international

Country: United States

PHONE

Mobile: 817-888-7777

-No Phone-

-No Email-

-No IM-



Cool Features

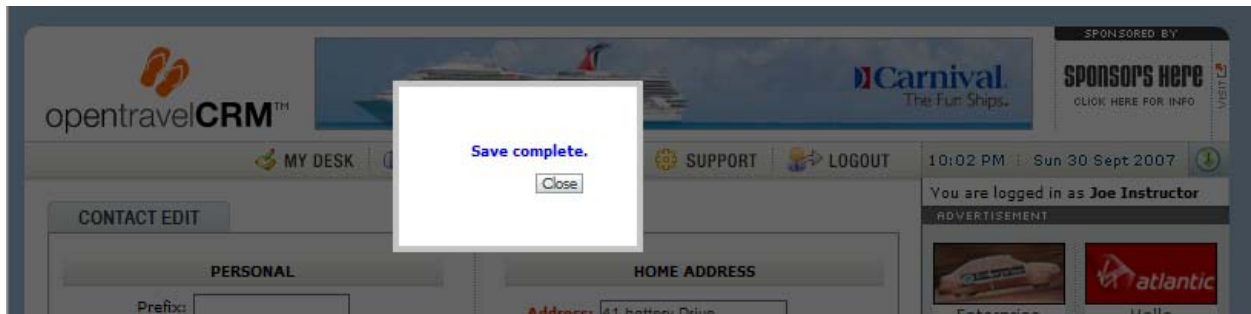
1. Just enter the postal code and the City and State automatically fill-in.

Just ask your contact for a postal code, then enter it and then the city and state fill automatically fill-in! Just click anywhere outside the postal code box after you enter it and it will magically appear.

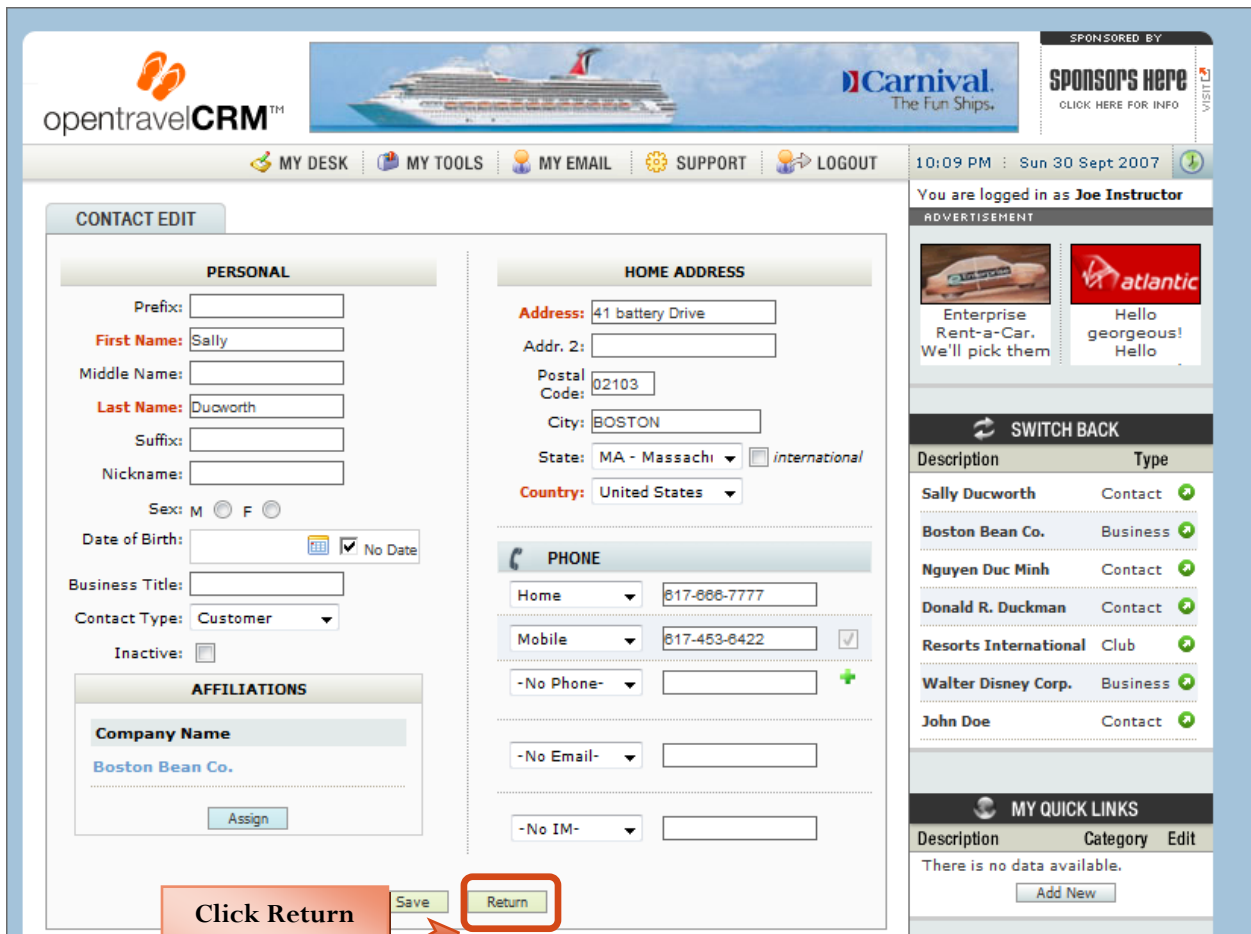
2. ...Search Data is carried over into fields

Whatever info you use to search by for a contact will be carried over into the new contact record to give you a headstart filling out the new record.

3. Save Contact - Once you have entered all the information that is available. Simply click the **<Save>** Button located at the bottom of the page (see diagram above) . Upon clicking **<Save>** a confirmation message will appear indicating the save is completed. Click the **<Close>** Button in the confirmation box and you'll be returned to the profile entry form.



4. Update More Info or Return. You can either make additional changes or add more information and repeat the save process (see above), or click the **<Return>** Button. The **<Return>** Button will take you to the newly created Contact Profile



5. **New Profile** – Once the **<Return>** Button is clicked you are sent to the new customer profile. At the Customer Profile a great variety of useful activities can be undertaken, but we'll cover that stuff in another Guide.

opentravelCRM™ **SPONSORED BY** **SPONSORS HERE** CLICK HERE FOR INFO VISIT US

10:16 PM : Sun 30 Sept 2007

You are logged in as **Joe Instructor**

SALLY DUCWORTH HISTORY

Personal **Business**

Nickname:

Address: 41 battery Drive
BOSTON, MA 02103

Main Phone: 617-453-6422 (Mobile)

E-Mail:

IM:

Membership:

Open Sales Opportunities 0

Active Offers 0

Activities Scheduled 0

Quotes 0

Upcoming Trips 0

SALES OPPORTUNITY **TAKE A NOTE**

AIR **HOTEL** **CAR** **CRUISE** **TOUR** **ACTIVITIES** **RAIL** **INSURANCE** **FEES** **GALILEO**

PROFILE **TRAVEL INFO** **NOTES / TASKS** **FINANCE** **MARKETING**

NOTES

There is no data available.

Add New Note

ADVERTISEMENT

Hertz

Enterprise Rent-a-Car. We'll pick them. Wise credit management has never

SWITCH BACK

Description	Type
Sally Ducworth	Contact
Boston Bean Co.	Business
Nguyen Duc Minh	Contact
Donald R. Duckman	Contact
Resorts International	Club
Walter Disney Corp.	Business
John Doe	Contact

MY QUICK LINKS

Description	Category	Edit
There is no data available.		
Add New		

4. Importing Existing Contacts

4.1 Importing from Outlook

You can import your existing contacts from Outlook into Opentravel CRM (OTC). Each record contact in Outlook will be created as a contact record in OTC. Just use the following step by step instructions:



Word of Encouragement to Novices....

Just follow the directions and don't worry. We have it all scripted out step by step.

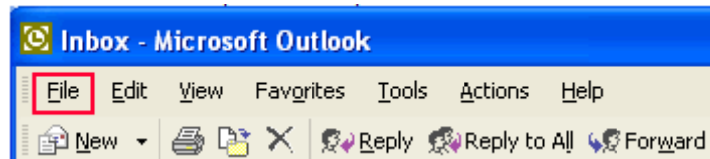
You will not mess up your Outlook information. We will be creating a copy of your contacts and saving it in a file on your computer, and then uploading it into Opentravel CRM. That's all.

So, as we like to say "Relax". When you're done you'll feel like a computer hero.

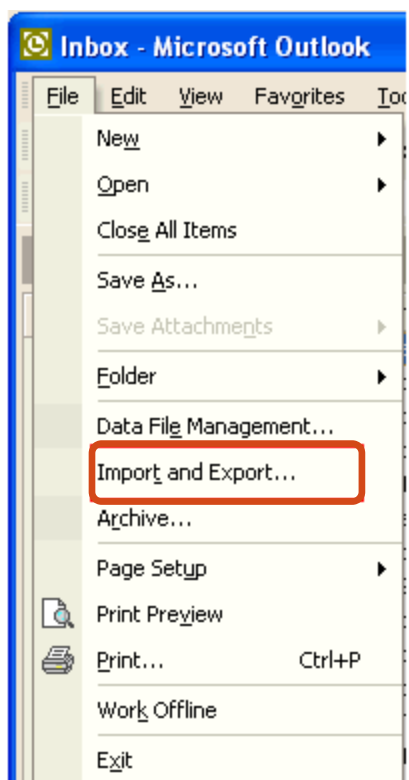
1. **Open Outlook** – Click on your Outlook Icon located on your computer desktop.



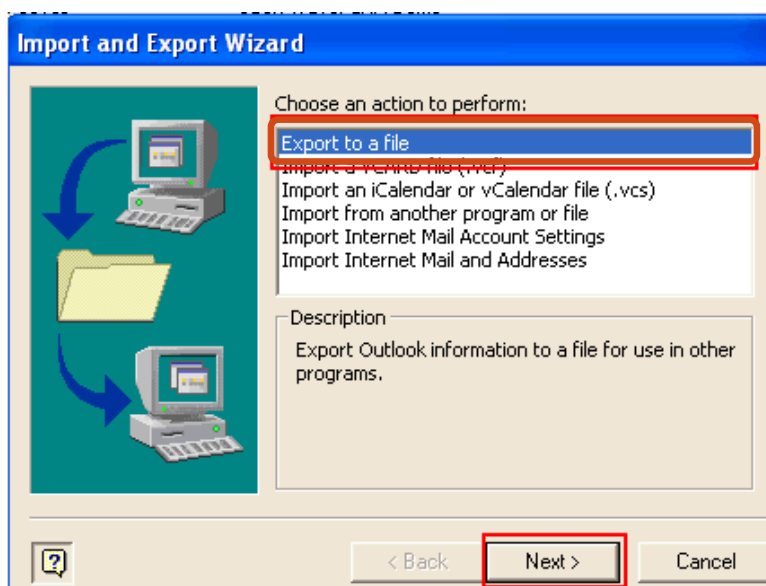
2. Open File Tab – Click the **<File>** Tab



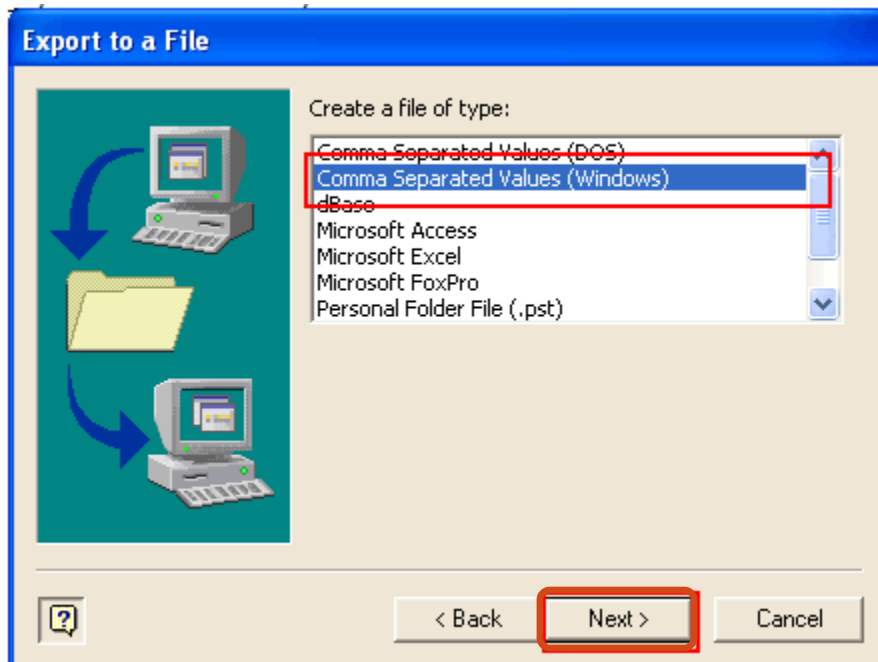
3. Select Import and Export – Click the **<Import and Export>** Tab



4. Import and Export Wizard – Select the “Export to File” option in the dialog box, and click the **<Next>** Button.



5. **Select the File Format Type** – Select the “Comma Separated Values (Windows)” option from the list and then click the **<Next>** Button.

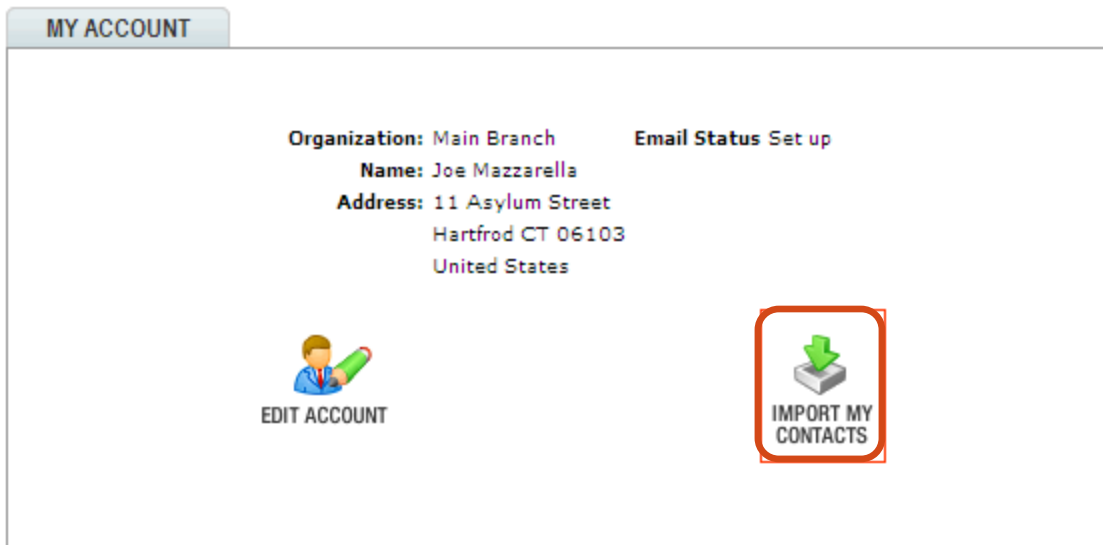


6. **Save Your Export File** - Save your newly created export file to a place on your computer. We suggest saving it under the name “My Outlook Contacts” under your “My Documents” folder so it is easy to find, because we will need to find it again. Once you have the file name and location set, click the **<Save>** Button.

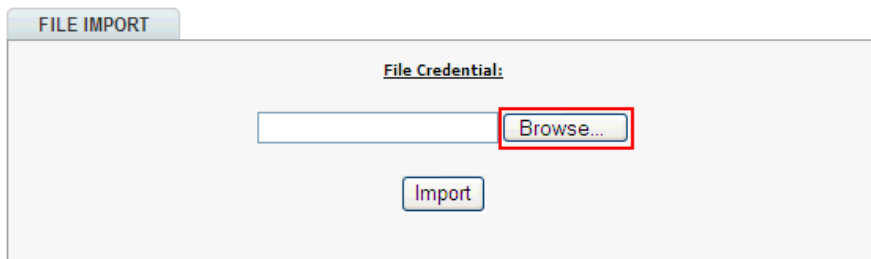
7. **Go to OTC** – Click the **[My Account]** Tab on the OTC Navigation Bar.



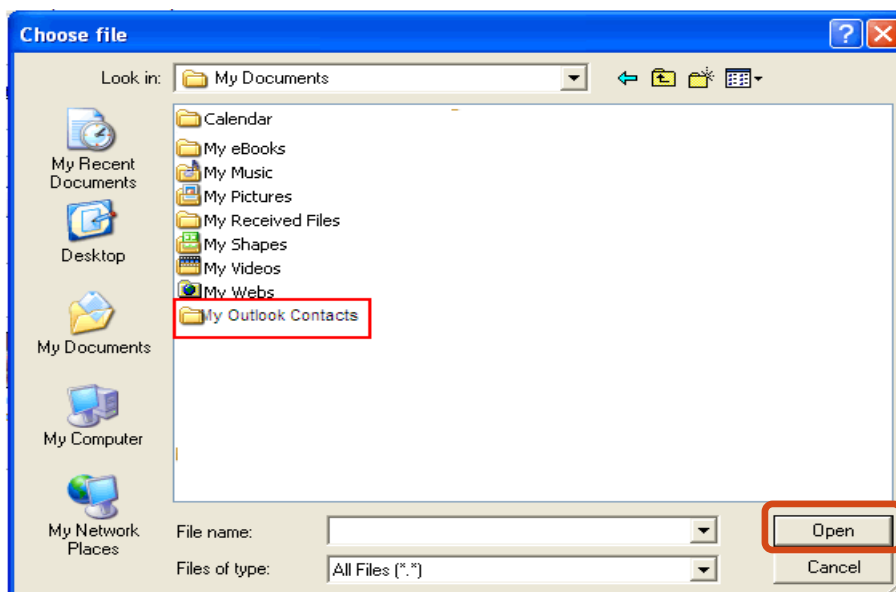
8. **Import Contacts** – Click the **<Import My Contacts>** Icon



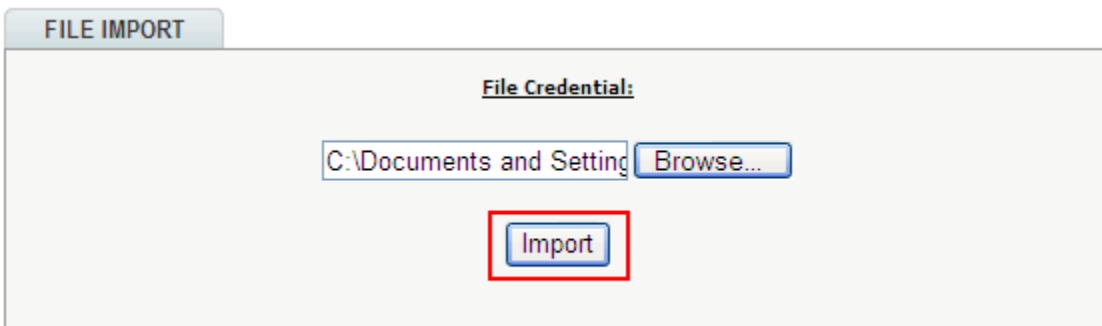
9. **Find the File You Created** – click the **<Browse Button>** on the **File Import** page.



10. **Find Your File** – Look for the file you previously saved. If you followed our suggestion, it should be a file under your "My Documents" folder labeled "My Outlook Contacts". Click the **<Open>** Button to attach the file.



11. **Import to OTC** – Click the **<Import>** Button. Your Outlook contacts have been imported. A message will appear confirming the import is successful.



12. **Congratulations!** Go impress somebody and tell them this:

