

V9 Introduction to Info Request

Agenda

- Basic setup of Info Request
- General Interest check boxes
- View/Print Leads
- Setup Lead List groups & manage leads
- Setup & distribute publications & emails

Info Request Module Overview

- Simple, fill-in-the blank form to record the requests for information
 - Consumer info
 - Check boxes for interests
 - Check boxes for requested literature/info
 - Travel dates
 - Lodging requirements
- Optionally integrated with your chamber's local web site

Benefits of Using Info Request

- Information delivered to consumers
 - Emails automatically sent
 - Printed literature queued
 - Labels automatically generated
 - Leads can be distributed to members
 - Reports available on requests

Access the Form

- Info Request – Enter Information Request
- Add button->Info Request
- From your own website (selections may be limited)

Consumer Information	
Name: <input type="text"/>	eMail: <input type="text"/>
Company: <input type="text"/>	Phone: <input type="text"/>
Mailing Address: <input type="text"/>	Fax: <input type="text"/>
<input type="text"/>	Contact By: <input type="text" value="Not Specified"/>
City/State/Zip: <input type="text"/> <input type="text"/> <input type="text"/>	<input checked="" type="checkbox"/> Release Information
Country: <input type="text" value="United States"/>	<input type="button" value="Send Quick Referral"/>
General Interests	
<input type="checkbox"/> Moving to the area	<input type="checkbox"/> Ice Fishing
<input type="checkbox"/> Attractions	<input type="checkbox"/> Winter Activities
<input type="checkbox"/> Conferences	<input type="checkbox"/> Spring Activities
<input type="checkbox"/> Summer Activities	<input type="checkbox"/> Outdoor Sports
<input type="checkbox"/> Shopping & Restaurants	<input type="checkbox"/> Mountain Climbing Activities
<input type="checkbox"/> Vacationing	<input type="checkbox"/> Fall Activities
<input type="checkbox"/> Festivals & Events	<input type="checkbox"/> Golfing
Information/Publications Requested (to be sent to consumer)	
<input type="checkbox"/> email	Hot Deals eNewsletter Mailing List (email only)
<input type="checkbox"/> email	Camping in the Valley Region
<input type="checkbox"/> mail	Golf Guide
<input type="checkbox"/> mail	Relocation Guide
<input type="checkbox"/> mail	Shopping Guide
<input type="checkbox"/> mail	Travel Guide
<input type="checkbox"/> mail	Travel Guide C
<input type="checkbox"/> email	Visitor Guide Book
<input type="checkbox"/> mail	

Basic Setup - Customize

- General Interest check boxes
 - Setup->General Interest Options
- Referred by selections
 - Setup->Consumer Referred By Options
- Trip purpose selections
 - Setup->Consumer Trip Purpose Options

Information Request

- ▶ **Consumer "Trip Purpose" Options**
- ▶ Travel Lead List Contact Groups
- ▶ General Lead List Contact Groups
- ▶ Events Calendar: View/Edit Event Types
- ▶ Preview Public Information Request Pages
- ▶ Install Quick-Communication Application
- ▶ **Consumer "Referred By" Options**
- ▶ **Consumer "Interest" Options**
- ▶ Chamber Publications
- ▶ Publication Distribution/Delivery Methods
- ▶ eReferral Settings/Options

View & Edit Leads

- Info Request ->Lead Management

Filter Options [Clear Filters](#)

Consumer Name:

Interest Category: [edit interests](#)

Lead Delivery Status:

Travel Leads:

Request Date: [use today's date](#)

[▶ Use a Date Range](#)

Include leads from consumers who *did not* authorize the release of their information.

[▶ Refresh Listing](#) [▶ Distribute Travel Leads](#) [▶ Distribute General Leads](#)

Sort Order:

Information Request Leads								
Action	Request Date	Consumer Name	Interests	Release Info	Travel Lead	General Lead Sent	Travel Lead Sent	Delete
edit	01/24/2011	Jim Coons	1 interests selected	Yes	No	No	No	<input type="checkbox"/>
edit	01/24/2011	John Simonson	4 interests selected	Yes	No	No	No	<input type="checkbox"/>

[▶ Print Summary Listing](#) [▶ Print Detailed Listing](#) [▶ Download Detailed Listing](#) [▶ Remove Completed Leads](#)

[▶ Refresh Listing](#) [▶ Distribute Travel Leads](#) [▶ Distribute General Leads](#)

Setup & Distribute Leads to Members

- Create lead list groups in Groups module
- Associate groups with general interests
 - Setup->General Lead List Contact Groups
- Designate one as a travel lead contact
 - Setup->Travel Lead List Contact Groups
- Each request may be one or both types of leads - general interest lead &/or travel lead
- Pass leads to members daily/weekly
 - Info Request-Lead Management->Distribute General Leads (and Distribute Travel Leads)

Distribute Publications & Info

- Setup list of publications and email attachments
 - Setup->Chamber Publications
- When selected, printed publications labels are queued for printing and handled at your convenience
 - Task List ->Pub. Requests->Print Mailing Labels
- Mailing labels are generated for you with a mailing code indicating literature piece
- Email attachments are automatically sent
 - Info Request->Publication Distributions (to see list of emailed publications)

Add New Publication

The yellow highlighting indicates the required fields. All other fields are optional.

Delivery Options indicate the format of this publication -- printed or a file. If downloadable is selected, the filename will be specified below and sent as an email attachment to the consumer.

Click the Publication Icon check box if an icon for this publication/email is desired. Then click Browse..., double-click the desired image. Click Refresh Image.

Click the Mail Code check box to place a code on the mailing labels that indicate the publication requested. Then type a unique combination of letters and numbers in the Mail Code box. Example: VG for Visitors Guide

Click the Downloadable File check box if you selected downloadable file as a delivery method. Then click Browse..., double-click the desired file. Click Refresh File. This will send as an attachment to the consumers email address.

Click Add/Remove Interests to select a specific General Interest option(s) that if selected by a consumer on the public website, will display this publication/email as a suggestion. Applicable only on the public website.

Type the name and description of the new publication.
Consumers and employees will view this name and description.
Check this box if this publication is to be displayed on the public website.

Select the default format for consumers on the public website.
Type the quantity of printed publications available on hand.

Required if setting up a printed publication.

Required if setting up an email attachment.

Click Save Changes when finished.

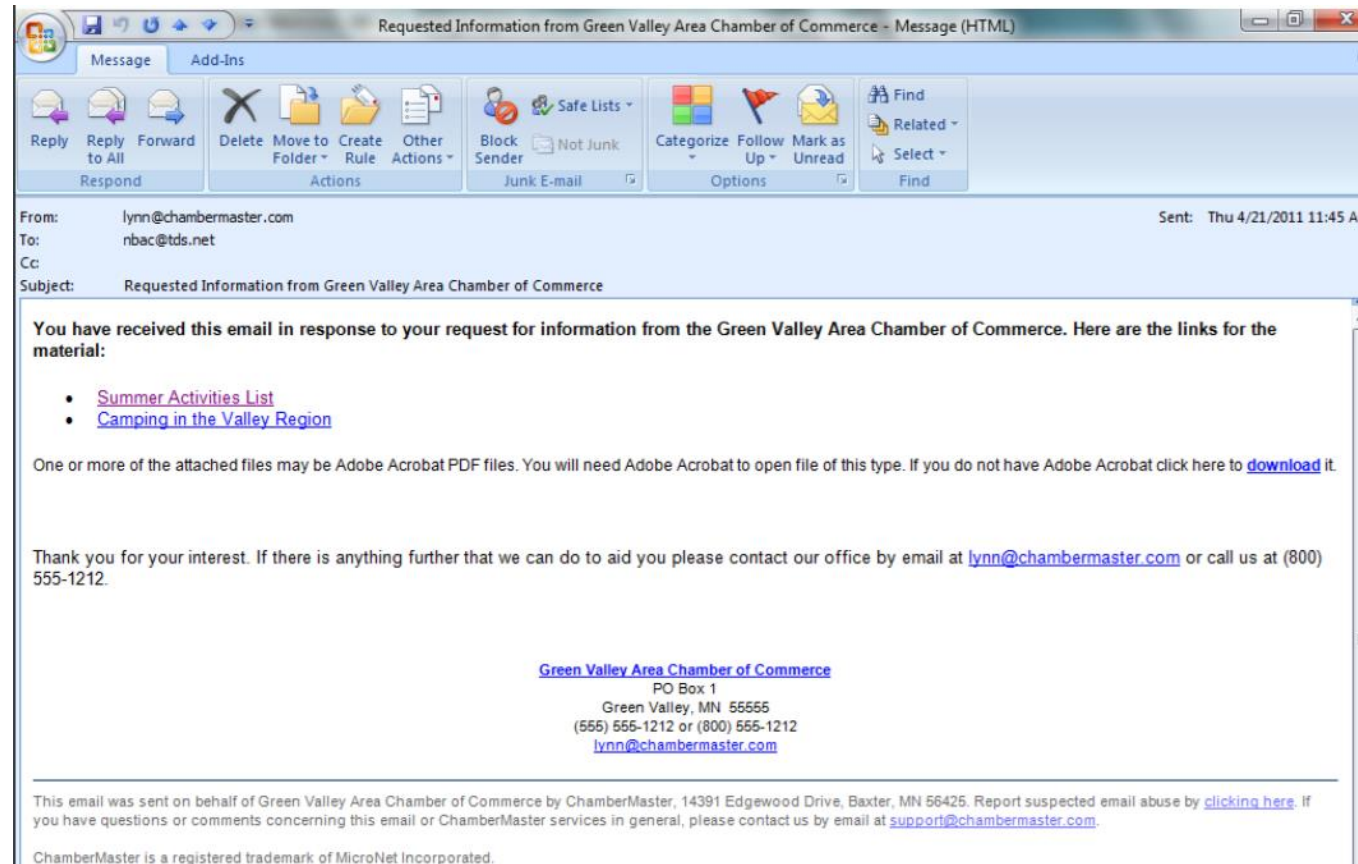
This publication will be displayed in the Information Request area of the software. It can be associated with a specific interest below.

Associated Interest Categories:

Add/Remove Interests

Sort Order	Name/Title	Prompts for Travel Info	Number of Rep Contacts	Number of Links	Number of Publications
There are no Interest Categories associated with this publication.					

Sample Email with Download Links

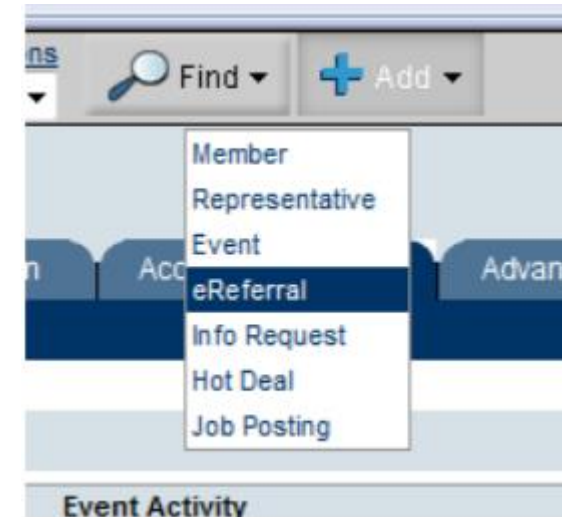


Web-site Only “Tweaks”

- Add a graphic next to publication name
 - Setup->Chamber Publications
- Determine which publications should show by default when an Interest is selected
 - Setup->Consumer Interest Options
- Display pertinent URLs on Thank you screen based on selected interests
 - Setup->Consumer Interest Options

Don't forget E-Referral

- If needing to send out member information “on-the-fly”, remember the eReferral option
 - Info Request ->Add an eReferral, click Quick Referral on Info Request form, or click eReferral on the Add button.



Questions or Assistance

800-825-9171 Option 4

support@growthzone.com