



# OTC Learning Guides

## OTC Overview

**TRAVEL SCIENCES, INC.**

September 30, 2007  
Version History – 1.0



# OTC Learning Guides

---

## OTC Overview

### Introduction

This Learning Guide will provide you with an overview of the core functions and capabilities of **opentravelCRM™** (OTC). It is an introductory Guide and provides only a cursory introduction to the main functions that are available.

### 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 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](mailto: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.

### A Good User License

You are free to use this Guide as part of the permitted use of the OTC software. You are also free to copy this Guide without limitation provided it is for educational uses associated with using OTC Software. You are also free to take portions of this Guide and electronically reproduce them and supplement them. Any changes you make for your own personal or internal business use belong to you, however you may not publish or distribute any content from this Guide for any commercial gain whatsoever without getting our permission first, and you agree that we can use any derivative works you create without restriction or cost that you do publish or make available to the public (which means if you create the "Better OTC Manual" and publish it, we can use and incorporate your work too and we don't have to pay for it). Your continued permission to use this material is also conditioned upon your compliance with the terms of use and license for the OTC Software. ACCESS OR USE OF THIS GUIDE FOR THE PURPOSE OF COPYING, REPRODUCING OR REVERSE ENGINEERING ANY OF THE OTC SOFTWARE OR ANY OF ITS FUNCTIONS IS STRICTLY PROHIBITED.

## Table of Contents

INTRODUCTION.....	1
HERE'S A SHOCKER... WE'RE NOT PERFECT!.....	1
LIABILITY FOR ERRORS & OMISSIONS.....	1
A GOOD USER LICENSE.....	1
USE & STYLE CONVENTIONS.....	3
1. INTRODUCTION TO OPENTRAVEL CRM.....	4
WEB BASED SERVICE & COMPATIBLE WEB BROWSERS.....	4
CONFIDENTIALITY & PRIVACY.....	4
EXPORTING CONTACTS – QUITTING OTC.....	4
WHAT THE HECK IS A PAGE?.....	4
2. KEY PAGES & PLACES –“ALL ROADS LEAD TO ROME”.....	5
THE NAVIGATION BAR.....	5
SPECIAL TABS AND PLACES.....	5
3. MY TOOLS PAGE – ACCESS ALL MODULES HERE.....	7
THE MY TOOLS ICON OVERVIEW.....	8
4. SWITCH BACK AREA – ALWAYS THERE FOR YOU.....	15
(SWITCH BACK).....	15
(MY QUICK LINKS).....	16
(MAIL ALERT).....	16
THANKS FOR BEING SO ATTENTIVE.....	16

## 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. Introduction to **opentravelCRM™**

Thank you for using OTC, your free customer relationship management (CRM) and multi-purpose desktop business tool. OTC is loaded with functionality to help you increase your sales, expand your customer base, and improve your overall business. Before we start, here are a few quick notes:

### **Web Based Service & Compatible Web Browsers**

OTC is a web based service application, which means you can access it anywhere and anytime over the internet. There is nothing to download to start using it, and all you need is a current Web Browser. OTC has been tested for compatibility with the following Browser types:



Internet Explorer (IE) – 6.0 and 7.0



Firefox - 3.0



Safari (Mac) -3.0

We recommend IE 7.0 or Firefox for optimal performance of advanced interactive functions.

### **Confidentiality & Privacy**

OTC keeps both your business information and your customers' information private. Your information is stored in a partitioned database environment and is separated from the view of all other users of OTC. We also employ SSL encryption and security to keep your information protected.

Also, please keep in mind that we do not sell or share customer information with any other party for marketing or advertising purposes.

### **Exporting Contacts – Quitting OTC**

If for some inexplicable reason you choose to quit OTC, we won't hold your information ransom. You can export your contacts to Excel any anytime. You can also export your sales information as well.

### **What the Heck is a Page?**

You will see us referring to "Pages". The quick answer to the question "what the heck is a page?" is that it is a "screen" in the vernacular of the old installed desktop computer application world. The term "page" is a term that refers to a web site page. The term got its meaning when web sites were not really dynamic and interactive. In the old days you linked from one page to another. ...you know...click on that link and go to this page, and click on the other link and go to that page. In the early days of the web, people had to make analogies, so a "page" made sense. The web has come a long way since then, but old habits don't die. Highly advanced technologies like .NET enable real advanced business software applications to be written as web applications. They behave similar to the old desktop software you used to have to install and download on your computer, but you don't download anything and you can just access your software through your browser over the Internet. So, the term "Page" just means a particular screen view of the application.

## 2. Key Pages & Places – “All Roads Lead to Rome”

The fastest way to get up to speed in any new application is to know where everything is, right? Imagine back to when you were invited to someone’s house for the first time and you’re in the kitchen and the host says, “just grab a spoon from the cabinet.” After opening about 19 drawers and doors, you finally get to it. But, the next time it’s easy. Once you’ve gone through the Kitchen enough, you can pretty much find everything, and you realize most kitchen’s are pretty much the same.

The same thing applies for any new software. Once you get the hang of where things are, life gets a whole lot easier. In the case of OTC, there are few main areas which will lead you everywhere you will want to go. To keep the Kitchen analogy going, let’s take a look at the pantry.

### The Navigation Bar

First, there is the Navigation Bar. It looks like this:



If you are ever stuck, lost, confused, or fed-up, click on one of the tabs. It’ll take you somewhere and make you feel better. Better, yet, click on the **[My Tools]** Tab, because this will take you to OTC’s main directory and from there you can get around to wherever you need to be again.

Once you are familiar with OTC, the Navigation Bar becomes a quick way to move from one frequently used place to another without having to go back to the **[My Tools]** Page which we will talk about in a minute.

### Special Tabs and Places

There are three (3) pages/areas that are the keys to getting around OTC efficiently. They are:

- The **[My Tools]** Page –is accessible anywhere in the application from the Navigation Bar. [My Tools] is a main application page containing clickable Icons that will take you to the major modules in OTC.
- The **[My Desk]** Page –is accessible anywhere in the application from the Navigation Bar. [My Desk] is your main information page and will contain an up to date snap shot of all your current inbound sales contacts, sales information, and other productivity information. When you start OTC, [My Desk] is basically empty and is not that interesting. Once you start using the system and make contacts with people and start marketing campaigns and sell stuff, you’ll probably think [My Desk] is the most important page in the whole system.
- The **[Switchback]** Area –is displayed on the right hand side of almost every Page of OTC. This is a very cool feature. You’ll learn to love the Switch Back. The Switch Back keeps track of all the places and things you were doing. You can hop around from one task to another. It’s great for multi-tasking.

Note: When you log-in you start at the My Tools Page.

My Desk Tab      My Tools Tab

opentravelCRM™      Carnival The Fun Ships.      SPONSORED BY SPONSORS HERE

MY DESK      MY TOOLS      MY EMAIL      SUPPORT      LOGOUT      10:47 PM      Mon 1 Oct 2007

You are logged in as **Joe Instructor**

**Switch Back Area**

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.		
<a href="#">Add New</a>		

**MAIL ALERT**

**ADVERTISEMENT**

PRINCESS CRUISES escape completely  
Princess Cruises

PRINCESS CRUISES escape completely  
Princess Cruises

PRINCESS CRUISES escape completely  
Princess Cruises

Enterprise Rent-a-Car. We'll pick them

atlantic Hello gorgeous! Hello

PRINCESS CRUISES escape completely  
Princess Cruises

Royal Caribbean INTERNATIONAL  
Royal Caribbean Cruise Lines

Copyright 2007 Travel Sciences Inc.  
All company names and logos used herein are (or may be) trademarks or trade names of their respective companies.

opentravelForum      opentravelBlog

When you Log-in to OTC, you will automatically start on the **[My Tools]** Page. **Please Note** that the only time you won't be brought to the **[My Tools]** Page is the very first time you log-in after you register. In that special, one-time case, you will be brought to a **[My Account]** Page which welcomes you to OTC and allows you to finish configuring your account, importing contacts, adding additional users, and setting-up discretionary add-on services.

You'll get this page the first time you log-in. All other times you'll start at **[My Tools]**.

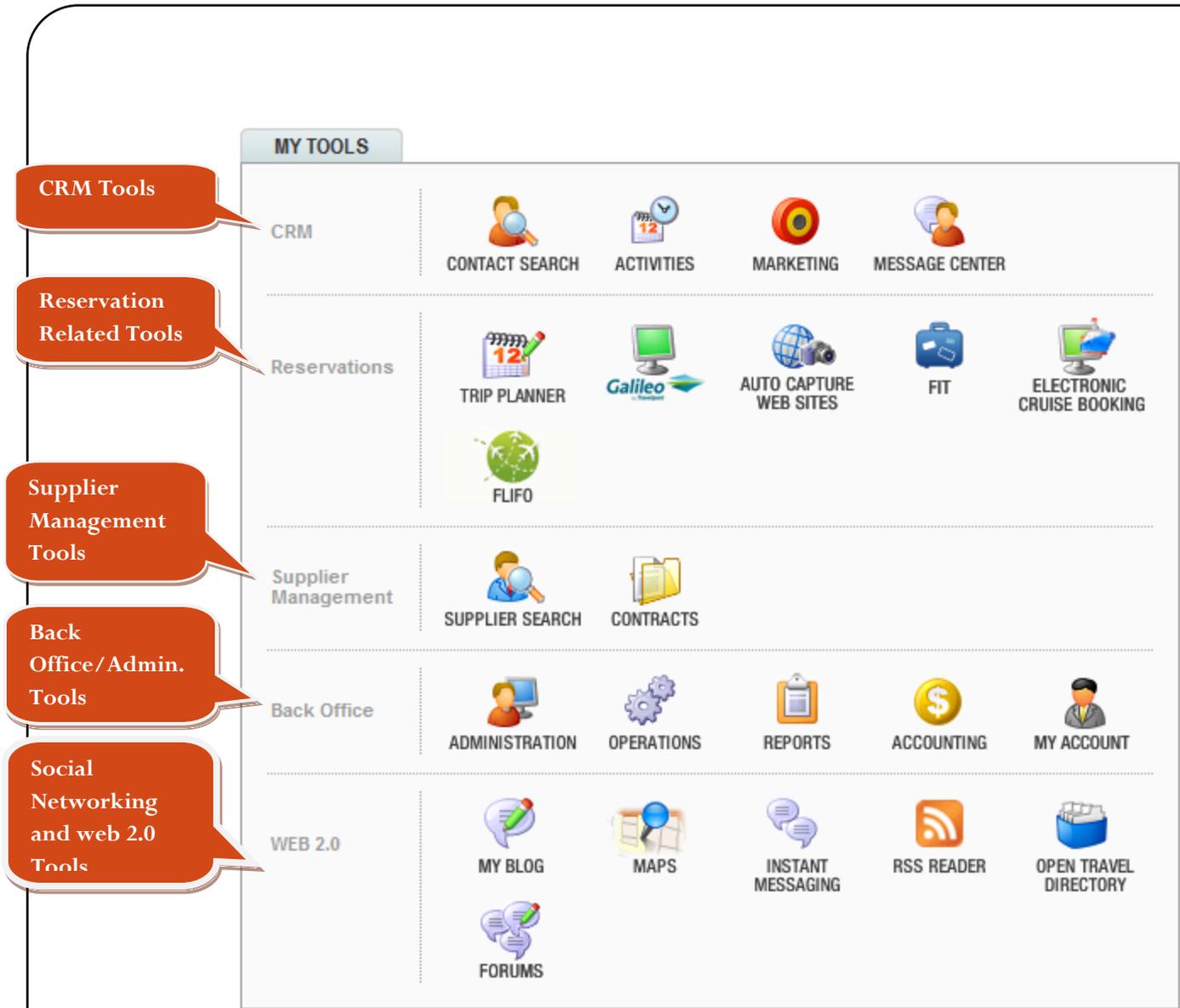
Copyright 2007 Travel Sciences Inc.  
All company names and logos used herein are (or may be) trademarks or trade names of their respective companies.

So, let's take a look at each of these important pages a little more closely.

### 3. My Tools Page – Access All Modules Here

Of all the important pages, this one is the most important of them all, because from this page you can access all the functional modules available in OTC. My Tools is organized into business area themes, and within each theme there are friendly Icons that lead you to the application functions selected. The business theme areas are:

- CRM Tools
- Reservation Related Tools
- Supplier Management Tools
- Back Office Tools
- Web 2.0 Tools



### The My Tools Icon Overview

Now, let's take a look at the Icons and their associated functions. As you will quickly learn, OTC has an amazing amount of functionality. In fact there's so much functionality for free, people think we're nuts! We'll let you decide:

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) TOOLS	
 <b>CONTACT SEARCH</b>	<b>Contact Search</b> enables you to search for contacts in your database. You can search for a wide variety of contact types, including existing customers, prospects, businesses, groups, clubs and more.

 <p>ACTIVITIES</p>	<p><b>Activities</b> is your own <b>personal calendar</b>. You can schedule and view appointments and other tasks. You can view your calendar by the day, week, month or year.</p>
 <p>MARKETING</p>	<p><b>Marketing</b> brings you to a main Marketing Page that has several task Icons. From marketing you can do things like start a new email campaign by using a simple step by step campaign wizard, design and create your own custom marketing templates, build special marketing lists, and track campaign results.</p>
 <p>MESSAGE CENTER</p>	<p><b>Message Center</b> is a list of all new inbound contacts that have been sent to you. Think of it as your “In Box”. Contacts can originate from email, inbound telephone calls, messages pulled from voicemail, and messages taken from the front desk, and they are routed to you.</p> <div data-bbox="516 772 1393 1029" style="background-color: #c0392b; color: white; padding: 10px; border-radius: 10px;"> <p> <i>Cool Feature.....“ While You Were Out”</i></p> <p>In the Navigation Bar there is a <b>[Take Message]</b> Tab that allows a receptionist or anyone else who answers phones to take a message and send them to you. These messages go automatically to your Message Center.</p> </div>
<p><b>RESERVATIONS AND BOOKING TOOLS</b></p>	
 <p>TRIP PLANNER</p>	<p><b>Trip Planner</b> is an interactive Itinerary builder. This tool allows you to build itineraries with travel items. The item’s status is tracked, such as quoted, booked, ticketed, and cancelled. Items can be added both automatically and manually. Quotes and suggested itineraries can be sent out to the client by email from a single click from the desktop.</p> <div data-bbox="516 1413 1393 1795" style="background-color: #c0392b; color: white; padding: 10px; border-radius: 10px;"> <p> <i>Cool Feature..... Slide &amp; Hide™</i></p> <p><i>Be prepared to be totally amazed. You won't find anywhere else, because nobody else has figured out how to do it! But, we did....</i></p> <p>You can use your mouse to drag and drop travel items. You can move and rearrange the order of items and hide others, and change the presentation of itineraries. You can now easily send out different versions to clients, and OTC keeps track of them. You can now serve your most exacting (or fickle) client with ease!</p> </div>

	<p><b>Galileo GDS</b> - If you need Galileo, we have made it accessible through OTC in a special way. OTC has a browser based “green screen” which reproduces the same functionality as your terminal. All PNR information is automatically imported into the OTC super PNR and trip itinerary.</p> <p><b>Note:</b> Galileo requires a “Service Bureau” access arrangement to enable your Psuedo City through OTC. Galileo charges a \$30 monthly access fees for this plus “GTID” charges. Why? We don’t know ask them.</p> <p><b>Note:</b> Direct Sabre and Amadeus GDS connectivity will be enabled soon.</p>
	<p><b>Auto Capture Web Sites</b> – This gives you a direct link over to leading supplier “travel partner” or “travel agent” log-in sites. When you book through these sites, OTC automatically captures the booking information and stores it in the Trip Itinerary and back office for you. So, this is a web PNR capture function.</p>
	<p><b>FIT IS AN ADVANCED FEE BASED ADD-ON MODULE FOR TOUR OPERATORS.</b></p> <p>It enables work flows for pricing of specialized itineraries for tour operators. If you are tour operator, please contact us at <a href="mailto:askus@opentravelcrm.com">askus@opentravelcrm.com</a></p>
	<p><b>Electronic Cruise Booking</b> - You can search and directly book cruises through this function. You will receive 100% of the commission when it is paid to OTC. The booking will occur through the OTC Pseudo City. A low 99¢ per night/cabin* processing fee applies.</p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  </div> <div style="text-align: center;">  </div> </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 20px;"> <div style="text-align: center;">  </div> <div style="text-align: center;">  </div> </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 20px;"> <div style="text-align: center;">  </div> <div style="text-align: center;">  </div> </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 20px;"> <div style="text-align: center;">  </div> <div style="text-align: center;">  </div> </div> <p><i>* This fee reflects the price information available as of the date this document was prepared. You are advised to check OTC marketplace to check for any fee changes, which take precedence over the information contained herein.</i></p>



**FLIFO** – Flight Information Services are available through OTC. You can receive up to the minute flight status and change information on any booked flights shown in your user account. This is an add-on fee service which offered at the unbelievable low price of \$4.99 per month\* per subscribed user.



*Cool Feature.....Services Like the Big Guys. So say "Orbitz Alerts, Travelocity TLC Alerts - No Problem. We've got it too."*

FLIFO allows you to send flight updates to your customers just like the big online retailers. Now, you can say "We've got that too. Plus, we offer real, personal customer service."

*\* This fee reflects the price information available as of the date this document was prepared. You are advised to check OTC marketplace to check for any fee changes, which take precedence over the information contained herein.*

## SUPPLIER MANAGEMENT TOOLS



**Supplier Search** – This is your internal supplier information directory. From here you can look-up **supplier profiles**, and also update information about them. Supplier information includes:

Contact information, Address, Commissions Info, Deposit Info, and Cancellation Rules Info, and Profile Information (Pictures, Descriptions, etc.)



*Did you know...*

CMS means "Content Management System". You might hear or read about CMSs. Well, OTC has one for supplier information. Did you know you can add and store pictures, write your own descriptions, add ratings, include reviews and other key information?

 <p><b>CONTRACTS</b></p>	<p><b>CONTRACTS IS AN ADVANCED FEE BASED ADD-ON MODULE FOR NET RATE INVENTORY MANAGEMENT.</b></p> <p>It enables you store Net Rate Contract Inventory for hotels, cruises and and other travel types. You can mark-up inventory and sell it. It handles both internal physical inventory and on-request inventory. If you manage and store your own net rate inventory, please contact us at <a href="mailto:askus@opentravelcrm.com">askus@opentravelcrm.com</a></p>
<p><b>BACK OFFICE</b></p>	
 <p><b>ADMINISTRATION</b></p>	<p><b>Administration</b> – provides you with access to key administrative functions for OTC. These include:</p> <ul style="list-style-type: none"> <li>• Setting Up Additional Users Under Your Account</li> <li>• Setting Up Your Organization Profile</li> <li>• Setting up User Permission Levels (Who can see and do what)</li> <li>• Configuring your Company Exchange Email Account Interface</li> <li>• Setting up and Assigning Sales Goals for Your Users</li> </ul>
 <p><b>OPERATIONS</b></p>	<p><b>Operations</b> – this provides organizations with many users and step by step processes (like QA) with the ability to apply workflows. Work items with status can be sent from one point to another for task completion and tracking until the overall item is completed.</p> <div style="background-color: #e67e22; border-radius: 15px; padding: 15px; margin-top: 15px;"> <p> <i>Cool Feature...</i> Workflow Automation – A Million Dollar Feature</p> <p>Workflow is an advanced feature for larger agencies or organizations that have departments where work items cycle through queues with statuses and open action items until they are completed. This is a <u>powerful feature</u> found only in very high-end, high priced systems that cost hundreds of thousands to millions of dollars. Think Oracle, Seibel and other enterprise level solutions.</p> <p>You get FREE standard generic workflows with OTC. If you need hire us to create new ones for you, please contact us.</p> </div>

 <p><b>REPORTS</b></p>	<p><b>Reports</b> – this provides access to numerous business reports that are important for running your business. The reports include:</p> <ul style="list-style-type: none"> <li>• Sales and Booking Reports</li> <li>• Commission Reports</li> <li>• Credit &amp; Accounting Reports</li> <li>• Marketing Reports</li> </ul> <p>You can review reports at an agency level, individual level or by user groups. Reports can be exported to Microsoft Excel.</p>
 <p><b>ACCOUNTING</b></p>	<p><b>Accounting</b> – this provides you access to a series of Accounting tools that will help you run your business and also interface with your accounting system. Tools include:</p> <ul style="list-style-type: none"> <li>• Enter and Track Commissions Payments and match them with an Invoice</li> <li>• Create a Commissions Invoice</li> <li>• View Outstanding and Unpaid Supplier Invoices</li> <li>• View Transactions</li> <li>• Create Batches for Posting to Accounting</li> <li>• Create and Map Travel Items to Specified General Ledger Accounts</li> </ul> <p><b>Quick Books</b> – You can purchase Quick Books and OTC accounting transactions will be automatically posted to your accounting system.</p> <div data-bbox="553 1094 1409 1339" style="background-color: #e67e22; border-radius: 15px; padding: 10px; margin: 10px 0;">  <p><i>Cool Feature... Auto Map Your Chart of Accounts</i></p> <p>There is a way to automatically map your Quick Books chart of accounts into OTC. Simply use the [COA] Icon located under the (Accounting) Tab.</p> </div> <p><b>Please check for information updates on these exciting enhancements:</b></p> <p><b>TRAMS</b> – OTC will be providing an export facility to transmit your transaction history to TRAMS.</p> <p><b>Export Transactions to Excel</b> – We’ve learned that some users are using Excel for their financial management. OTC will provide you with the ability to export transactions to Excel.</p> <p><b>Export to CSV</b> – We’ll provide a CSV file export for transactions so you can map them into any accounting system you are using.</p>
 <p><b>MY ACCOUNT</b></p>	<p><b>My Account</b> provides you, the user, with access to your user profile. From here you can set-up or edit email configurations, update your contact information and change your username and password. Please note that account users with Administrative</p>

rights have access to all user accounts.

## WEB 2.0 TOOLS



**My Blog** – gives you direct access to your own Blog Page. You can create your style and Blog theme, and start posting articles to it.



*Did you know...*

Blogs are great marketing tools. They are mini-web pages where you share your travel insights with the world. When you write a Blog article, the general public can read your articles and they will want to know more and contact you.



**Maps** – OTC provides you with direct access to virtual maps and driving directions. You no longer have to leave your desktop and search another site. It also provides “Points of Interest”. You can find a location (like a hotel address) and then find things around it, like ATMs, Restaurants, Golf Courses and other things.



*Cool Feature... Maps Are Built-in To All Address in OTC*

OTC has a little Map Icon next to every address that appears in the system. Simply click on it and an interactive map will open and zoom to the address. You can send driving directions to customers by a simple email click!



**Instant Messaging** – OTC provides a page where you can start up all your IM clients and check to see what buddies and customers are online.



*Cool Feature... IM is Built-in to All Contacts*

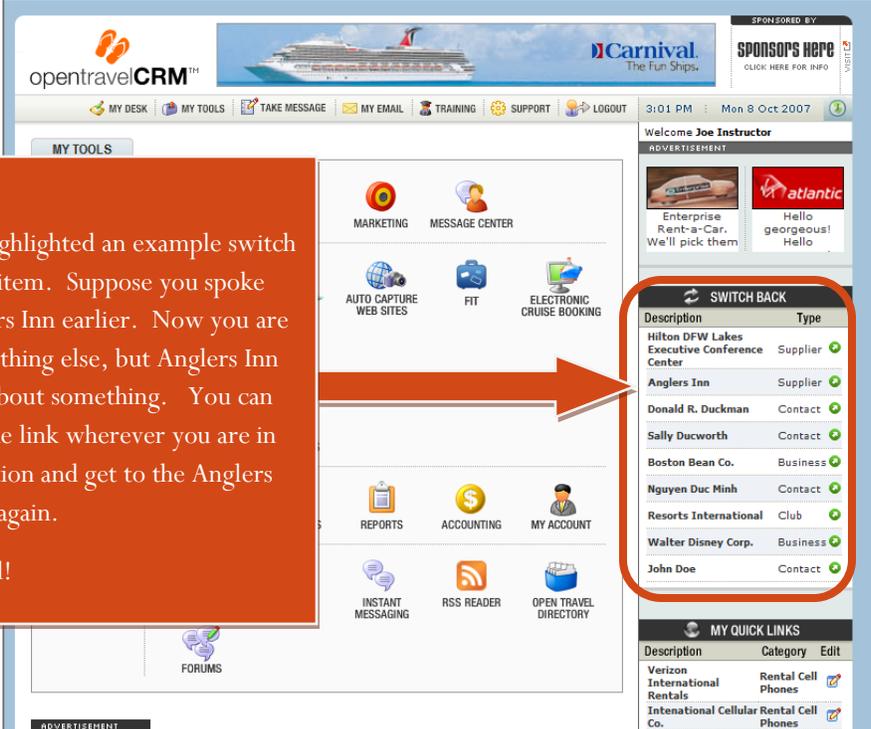
OTC has a little IM Icon next to a person’s contact name. You can roll-over it and see if they are online. If they are, just click the IM Icon and you can start a conversation!

 <p>RSS READER</p>	<p><b>RSS Reader</b> – OTC provides you with real time news and information feeds from news sources and other information providers. You can sign-up for other RSS feeds and have them automatically sent to your Reader page through a subscription utility. It's a great way to get fresh, to date news from important sources.</p>
 <p>OPEN TRAVEL DIRECTORY</p>	<p><b>Open Travel Directory</b> – is a public web site directory that suppliers can use to add their company information to. You can search the directory for additional suppliers that are not part of your internal supplier list.</p>
 <p>FORUMS</p>	<p><b>Forums</b> – is a private OTC user only forum. You can click the icon and you are automatically signed in and you can start interacting with other peers by posting messages. This is a great way to share information and professional tips, and to make new friends.</p>

#### 4. Switch Back Area – Always There For You

##### (Switch Back)

The Switch Back is a key innovation and tool for users. The Switch Back shows upon every page of the OTC application, and keeps track of where you have been and what you were doing. Each place you were at or activity you were doing is automatically stored off as a quick link so you can quickly get back to it. They are show newest to oldest. It also shows the type of activity you just were doing.



We have highlighted an example switch back entry item. Suppose you spoke with Anglers Inn earlier. Now you are doing something else, but Anglers Inn calls back about something. You can just click the link wherever you are in the application and get to the Anglers Inn profile again.

Pretty Cool!

Description	Type
Hilton DFW Lakes Executive Conference Center	Supplier
Anglers Inn	Supplier
Donald R. Duckman	Contact
Sally Ducworth	Contact
Boston Bean Co.	Business
Nguyen Duc Minh	Contact
Resorts International	Club
Walter Disney Corp.	Business
John Doe	Contact

A couple of additional helpful items are found in the switch back area too.

### (My Quick Links)

My Quick Links is like a My Favorites for web sites. You can add important informational web site links that you like to visit here. In our example, we have listed some international cell phone coverage web sites.



You or your agency can establish a list of web site links that are frequently used to save time and increase ease of quick access. Other sites of interest might include the Transportation Security Administration, FAA, Homeland Security and US State department Sites, for example.

### (Mail Alert)

OTC has integrated Email. You just need to configure it under the [User Account] Tab which is access from the (My Tools) Page. When you email set-up, any new emails will show up as an alert in the Mail Alert Box. Just click on the Email entry and it will open up a window so you can read the email and take action.



### Wake-up We're Done - Thanks for Being So Attentive

We hope you found this introduction useful in giving you a quick overview of the tremendous functionality that is available to you. For more in-depth instructional information on various functions we have covered, please look for additional Learning Guides which will be published and updated from time to time to help you get the most out of OTC.

