



GroupConnect Quoting System

InfoTree Inc.
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As part of an enhanced listing on GroupConnect.com, vendors can receive quote requests from interested group leaders. This system makes it easy to track, respond to and manage quotes received through the GroupConnect system.

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System Overview

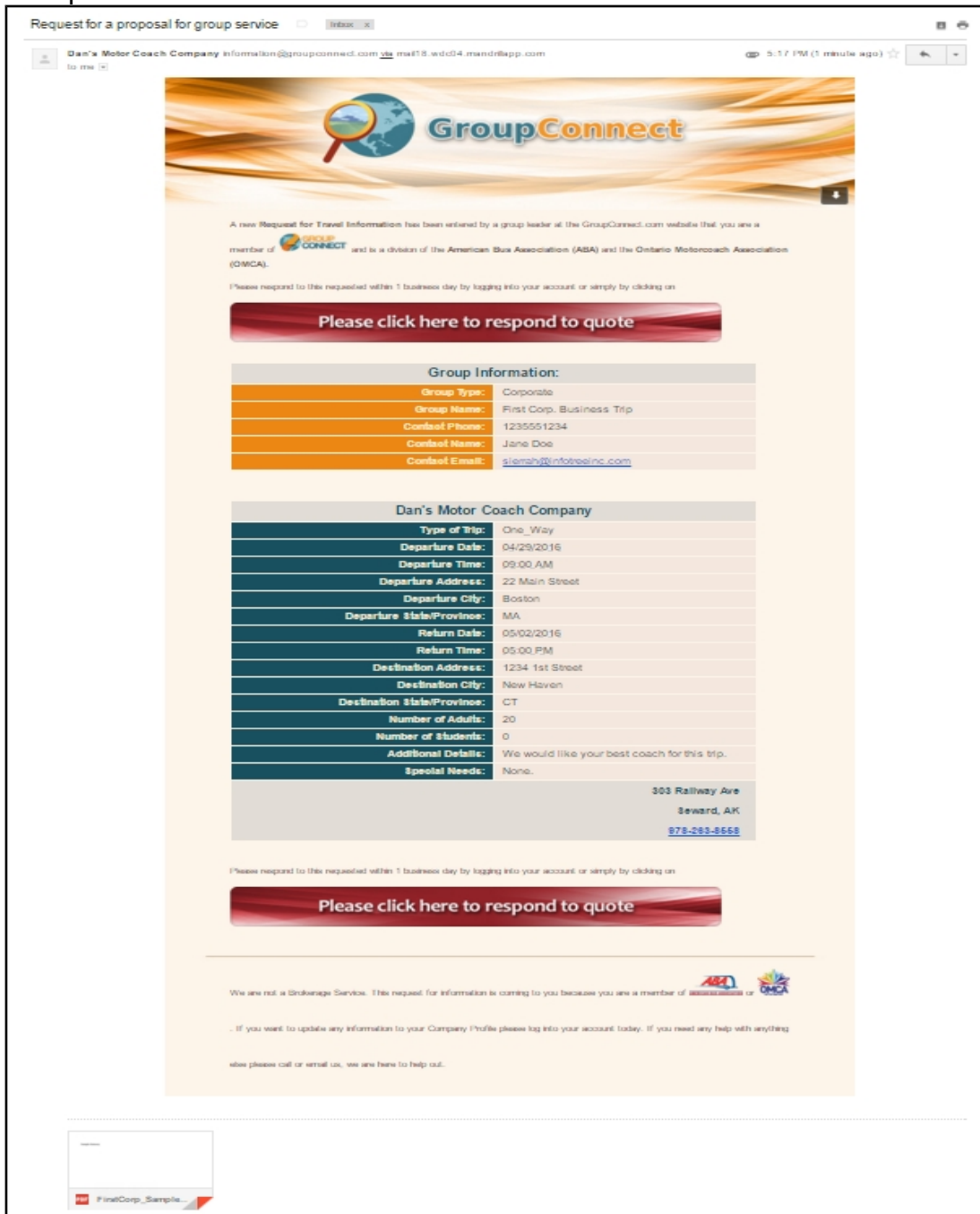
GroupConnect has a Quote Management system available for our enhanced listing users through an easy to use portal in your GroupConnect profile.

1. A group leader will request a quote for your service, and you will receive an email
2. You can respond through the Quote Management system, either offering your quote or denying the service if it doesn't fit with your business.
3. You will also see the status of any quote request in your Quote Management system.
4. The group leader will then receive an email and respond, again through the Quote Management system.
5. It is then up to you to close your sale!

This guide will take you through all of the steps from receiving your first quote request to the successful completion of a quote.

Receiving a Quote Request

When a group leader requests a quote for your service, you will receive an email. The email will be sent to the main email address on your profile as well as any additional contacts listed as “receive quotes” in your profile. For more information about adding contacts to your profile, see the GroupConnect User Guide.



TIP! Make sure information@groupconnect.com is accepted as a trusted sender in your email so you won't miss these quote requests.

This email will contain all the information the group leader provided including:

- Group Type
- Group Name
- Contact Phone
- Contact Name
- Contact Email

It will also detail some specifics about their travel including:

- Type of Trip (round trip or one way)
- Departure and Destination Information
 - Date
 - Time
 - Address
- Number of Adults and Students
- Additional Details
- Special Needs





TIP! Group leaders can attach itineraries to this email. Be sure to check if they have included this information.

To respond to this quote request, click the button that says “Please click here to respond to quote”.

Note: We promise group leaders a response to quote requests within 3 business days. You will therefore receive up to 3 reminder emails to respond to quotes. If there is no response by the third email, the system automatically responds that your business is unable to accommodate the request. Make sure to respond to your quote requests!

Responding to a Quote Request Part 1

When you click “Please click here to respond to quote” you will be taken to your Quote Management system on GroupConnect.com


sierrah@infotreeinc.com ▾   

Quote Request

Requester: sierrah@infotreeinc.com **Request Time:** 03/30/2016 04:17PM

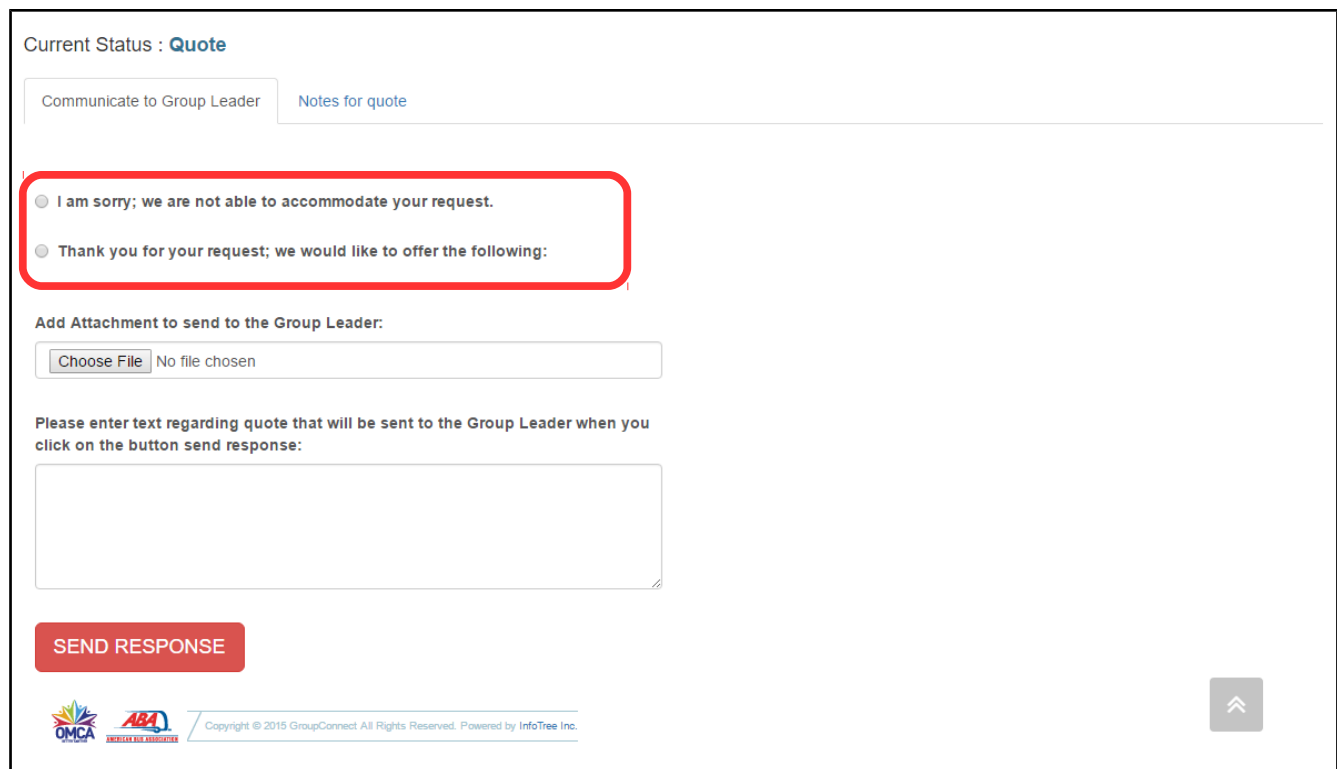
Subject: Request for a proposal for group service

Group Type:	Corporate
Group Name:	First Corp. Business Trip
Contact Name:	Jane Doe
Contact Phone:	1235551234
Contact Email:	sierrah@infotreeinc.com
Type of Trip:	One_Way
Departure Date:	04/29/2016
Departure Time:	09:00 AM
Departure Address:	22 Main Street
Departure City:	Boston
Departure State:	MA
Destination Address:	1234 1st Street
Destination City:	New Haven
Destination State:	CT
Return Date:	05/02/2016
Return Time:	05:00 PM
Number of Adults:	20
Additional Details:	We would like your best coach for this trip.
Special Needs:	None.

Here you will see the same information included in the email. You will also see the time this quote request was made.

Review this information carefully to ensure you give the group leader the most accurate quote possible.

To respond, scroll down to the bottom of the page.



The screenshot shows a web interface for responding to a quote. At the top, it says "Current Status : Quote". Below this are two tabs: "Communicate to Group Leader" (selected) and "Notes for quote". Under the selected tab, there are two radio button options: "I am sorry; we are not able to accommodate your request." and "Thank you for your request; we would like to offer the following:". The first option is highlighted with a red box. Below the options is a section for "Add Attachment to send to the Group Leader:" with a "Choose File" button and "No file chosen" text. Below that is a text area for "Please enter text regarding quote that will be sent to the Group Leader when you click on the button send response:". At the bottom left is a red "SEND RESPONSE" button. At the bottom right is a grey button with an upward arrow. The footer contains logos for OMCA and ABA, and copyright information: "Copyright © 2015 GroupConnect All Rights Reserved. Powered by InfoTree Inc."

You are able to see that the current status of this request is “Quote”. This will change as you move through the process to let you know how each of your quotes stand.

In the “Communicate to Group Leader” tab, you have two options:

“I am sorry; we are not able to accommodate your request”

When this option is selected, an email will be automatically generated to let the group leader know that you are unable to accommodate the request. The status for this quote request will become “Closed”

“Thank you for your request; we would like to offer the following”

By selecting this option, you are given additional dialogue boxes to fill in. You also have the option to enter additional details in the text box below these boxes, or send an attachment to your customer.

Thank you for your request; we would like to offer the following:

Service will start on	<input type="text" value="04/29/2016"/>
Service will end on	<input type="text" value="05/02/2016"/>
The seating capacity is	<input type="text"/>
The motor coach has lavatory	<input type="text"/>
	(Yes/No)
The price for service requested is	<input type="text" value="\$"/>
The sales tax ratio is	<input type="text"/> %
The sales tax amount is	<input type="text" value="\$"/>
The total price is	<input type="text" value="\$"/>

Add Attachment to send to the Group Leader:

No file chosen

Please enter text regarding quote that will be sent to the Group Leader when you click on the button send response:

Select an option and click “Send Response” to send either the rejection or quote email to the group leader. This will change the status of the Quote to either “Closed” or “Responded”

You can also attach notes to your quote. Simply change the tab to “Notes for quote” and add your note in the text box



The screenshot shows a web interface for the GROUPCONNECT quoting system. At the top, it displays "Current Status : Quote". Below this, there are two tabs: "Communicate to Group leader" and "Notes for quote". The "Notes for quote" tab is selected and highlighted with a red circle. Underneath the tabs, there is a section labeled "NOTE:" followed by a large, empty text input box. At the bottom left of the form, there is a blue button labeled "SAVE".

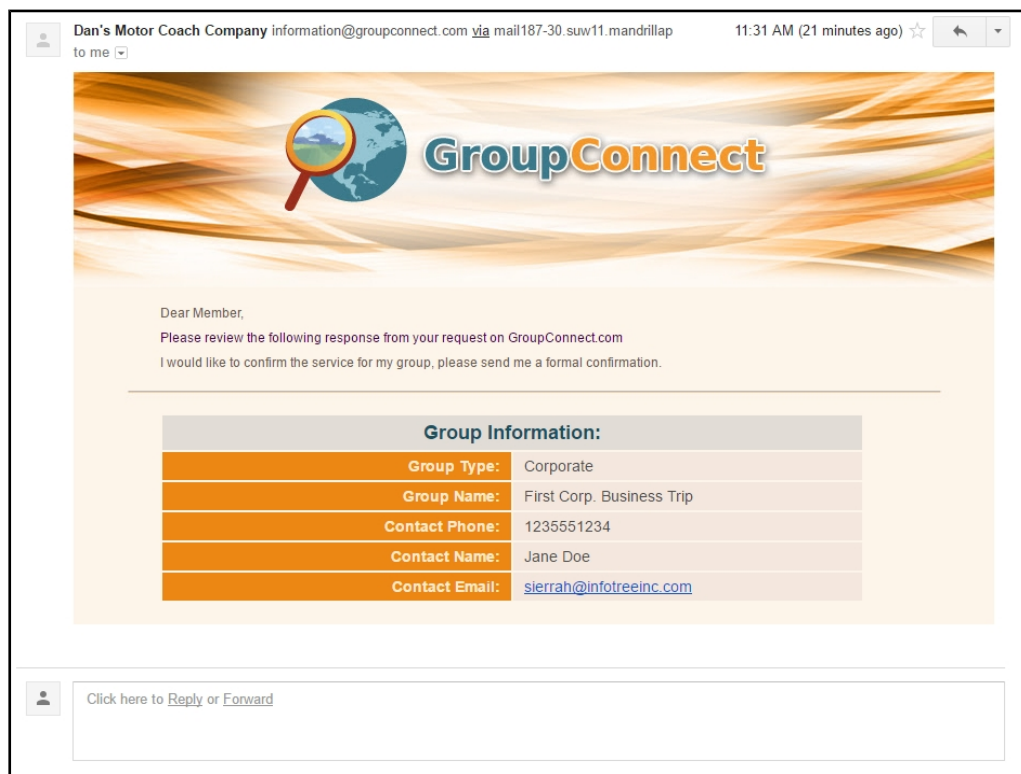
Responding to a Quote Request Part 2

If you send a quote to the group leader, they have three options for response:

1. Thank you for the information and no followup is needed.
2. I would like to confirm the service for my group, please send me a formal confirmation.
3. Thank you for your proposal, I would like to discuss it with you, please contact me. Here are two days I would like to hear from you:

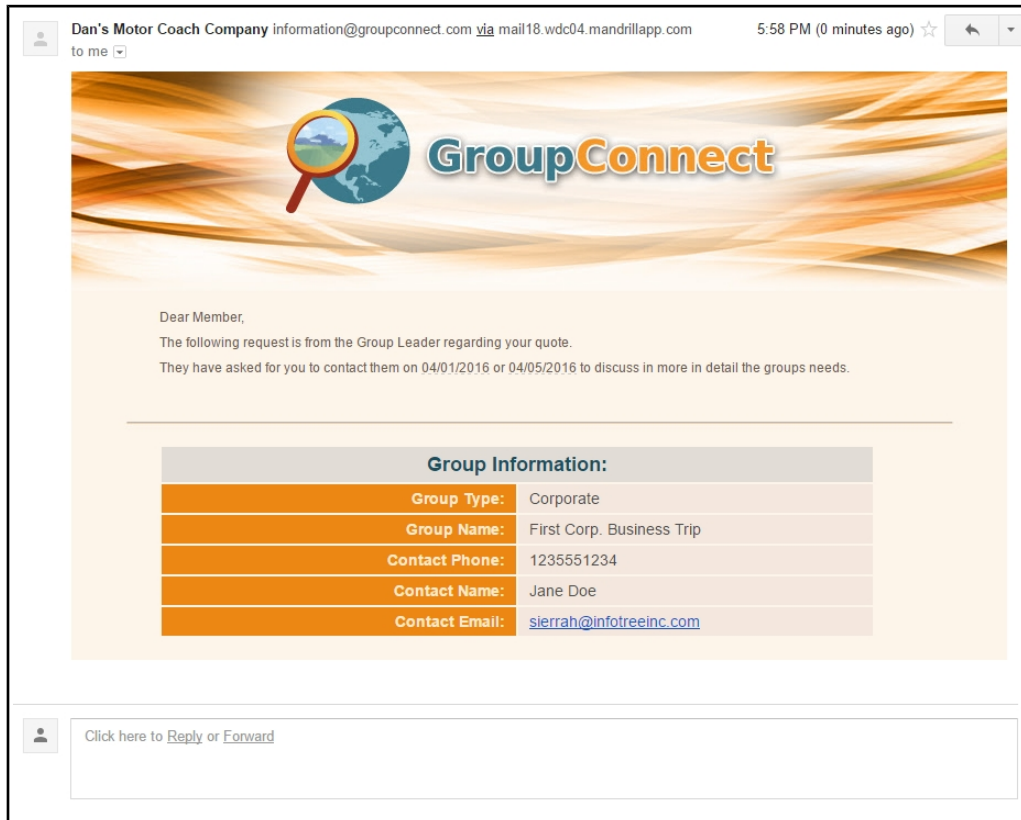
If the group leader chooses the first option, no further action is required.

If the group leader chooses the second option, you will receive an email asking for a formal confirmation. Please follow up directly with your company's confirmation.



TIP! You must reply directly to the contact email listed. If you reply to this email, the confirmation will not reach your customer.

If the group leader chooses the third option, you will receive an email with two dates for an appointment:



Please respond to the group leader using the contact email listed to confirm your appointment.

Managing Your Quotes

To review and manage all of your quotes in one place, you can log in to your GroupConnect Profile at www.GroupConnect.com. If you would like further information about logging in to your GroupConnect profile, see the GroupConnect User Manual.

To access the Quote Management landing page, click your email address in the top right corner and click "Quote Management" from the drop down menu.

The screenshot shows the GroupConnect user interface. At the top left is the GroupConnect logo. In the top right corner, the user's email address 'sierrah@infotreeinc.com' is displayed with a dropdown arrow. A red arrow points to this dropdown menu, which is open and shows three options: 'Profile', 'Quote Management' (circled in red), and 'Log out'. Below the navigation bar, there are tabs for 'PROFILE', 'EXTENDED PROFILES', 'LOGO AND PICTURES', 'DOCUMENT', and 'CONTACTS'. The main content area is titled 'COMPANY/ORGANIZATION CONTACT INFORMATION' and contains several form fields for user and company details, including 'Company / Organization Name', 'Position/Title', 'Email', 'Website', 'First Name', 'Middle Name', 'Last Name', 'Phone Number', 'Alternate Phone', 'Cell', 'Toll Free', 'Fax', and 'Youtube Username'. A 'Preview' button is next to the company name field. At the bottom, there is a section for 'CREATE/CHANGE PASSWORD' with a 'New Password' input field.

This is the Quote Management landing page where you can see the status of all of your quotes.

The screenshot shows the Quote Management landing page. On the left, there are search filters: 'Request Time At:' with a date input field, 'Status:' with a dropdown menu, and a 'Search' button. The main area contains a table with the following data:

Group Name	Email	Subject	Quote Date	Last Reply	Status	Reminded
Sierra's Group	sierrah@infotreeinc.com	Request for a proposal for group service	03/29/2016 03:48PM	03/29/2016 03:51PM by Dan's Motor Coach Company	Responded	0
First Corp. Business Trip	sierrah@infotreeinc.com	Request for a proposal for group service	03/30/2016 04:17PM	03/30/2016 04:58PM by Jane Doe	Accepted	0
First Corp. Business Trip	sierrah@infotreeinc.com	Request for a proposal for group service	03/31/2016 10:24AM	03/31/2016 10:31AM by Jane Doe	Accepted	0

At the bottom of the table, there are pagination controls showing '1 2 3 »'. The 'Search' button and the first row of the table are highlighted with red circles and numbers 1 and 2 respectively.



From this page, you can:

1. Search for a specific quote request by time or status

This screenshot shows the 'Request Time At:' filter. The date '04/01/2016' is entered in the input field. A calendar is displayed below, showing the month of April 2016. The calendar grid includes days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates from 1 to 30.

This screenshot shows the 'Status:' filter. The dropdown menu is open, displaying the following options: Closed, Quote, Responded, and Accepted. The 'Request Time At:' filter is also visible, with dates '04/01/2016' and '03/31/2016' entered in the input fields.

2. See details of any quote request by clicking on the quote.


siemzh@infotreeinc.com 

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Quote Request

Requester: siemzh@infotreeinc.com **Request Time:** 03/30/2016 04:17PM

Subject: Request for a proposal for group service

Group Type:	Corporate
Group Name:	First Corp. Business Trip
Contact Name:	Jane Doe
Contact Phone:	1235551234
Contact Email:	siemzh@infotreeinc.com
Type of Trip:	One_Way
Departure Date:	04/29/2016
Departure Time:	09:00 AM
Departure Address:	22 Main Street
Departure City:	Boston
Departure State:	MA
Destination Address:	1234 1st Street
Destination City:	New Haven
Destination State:	CT
Return Date:	05/02/2016
Return Time:	05:00 PM
Number of Adults:	20
Additional Details:	We would like your best coach for this trip.
Special Needs:	None.

Current Status : Accepted

CLOSE QUOTE

Communicate to Group Leader



Notes for quote

Jane Doe asked for appointment - at 03/30/2016 04:58PM

They have asked for you to contact them on 04/01/2016 or 04/05/2016 to discuss in more in detail the groups needs.

Dan's Motor Coach Company added a reply - at 03/30/2016 04:57PM

Service will start on 04/29/2016.
 Service will end on 05/02/2016.
 The seating capacity is 50.
 The motor coach has lavatory Yes.
 The price for service requested is \$1000.
 The sales tax ratio is 10%.
 The sales tax amount is \$100.00.
 The total price is \$1100.00.



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Further Questions?

If you have any further questions, please do not hesitate to contact us! Our office Hours are Monday thru Friday 9am – 6pm EST.

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