

8/23/2013

Hello Everyone,

Attached are the additional documents we discussed during the rollout of the new PTB payment process.

- Booking Confirmation Template (BCT) – Please be sure to attach the completed document to every oppty (with all other documentation) prior to sending the oppty to 937 to be booked as a reservation. To save time, populate the template with your market information prior to saving it.
- Reference Guide – Refer to this document in the event you have any questions regarding what type of information is required for any field on the BCT.
- Client Referral Fees – I have also updated the Referral Fees document to include new CSR and EPIC accounts, the tiered referral rates and reminders regarding their processing. Please keep this close by for easy access. RFH's should contain all of this information as well. If you receive a lead direct from the client, they will still have expect the fees to be paid by Oakwood, so be sure to include the fees in your quote, then create the Oppty in Siebel and send it to the Phx Nal's/937 to book.

Please be sure to share this information with all associates. These documents will also be posted on the Franchise LiveWire for your reference.

If you have any questions, please let me know.

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