

11/15/2013



KING'S  
CREEK  
PLANTATION

## OWNER SERVICES CRMS TRAINING MANUAL

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# PROSPECTS

## FINDING YOUR PROSPECT

The screenshot shows the 'PROSPECT SEARCH' window. On the left is a vertical menu with options: Home, TimeClock, Accounting, Prospects (highlighted with a blue arrow), Contracts, Mortgages, Tours, Packages, Reservations, Property Management, Reports, Personnel, Add-Ins, WorkOrders, and Setup. The main search area has a 'Filter:' dropdown menu currently set to 'Phone'. Below it is an 'Enter' field for input. To the right of the input field are 'Query' and 'New' buttons. The dropdown menu is open, showing a list of search criteria: Address1, City, Email, ID, Name, Phone (selected), PostalCode, SpouseSSN, SSN, and State. In the top right corner, it says 'Welcome Alison Wyatt' with a 'Log out' link below it.

PROSPECT records are a list of all individuals that can be found in CRMS. These include not only owners, but also leads, reservation guests and package holders.

The PROSPECT TAB is located in the menu on the left side of the window in CRMS. The menu is accessible from any section in CRMS.

The PROSPECT TAB allows you to search for individuals using multiple types of information. You may search by the following: Address, City, Email, Prospect ID, Name, Phone Number, Postal Code, Spouse's SSN, SSN and State. Your search results will vary greatly depending on the type of search you perform. In using a general search such as City or Postal Code, the more results your search will return. By narrowing down the parameters of your search, the more accurate the results you will receive, for example searching by SSN or Phone Number. To begin the search, you would choose your filter from the drop down menu, enter the information related to the filter and click on the Query button. Any results that match your request will be listed below the search box.

Please note that you may also enter partial information to perform your search request, such as the first few digits of a phone number or name. By only using partial information, this opens up your search parameters to return multiple results. Also, as names, phone numbers and addresses can potentially belong to multiple individuals, you may still find that the results of your search (even if very specific) may be numerous. Remember – Prospect records are for everyone in our database.

The prospect record will give you a complete overview of the individual's history with KCP. Here is where you will find the personal information, contracts, tour and reservation history and contract financials.

PROSPECT SEARCH

Welcome Alison Wyatt  
[Log out](#)

Filter: Phone

Enter Home Phone: 7573456793

	LastName	FirstName	ProspectID	Phone
Select	ELLIOTT	JUANITA	6596154	7573456793
Select	Hildebrand	Cathy	6967532	7573456793

Home  
TimeClock  
Accounting  
Prospects  
Contracts  
Mortgages  
Tours  
Packages  
Reservations  
Property Management  
Reports  
Personnel  
Add-Ins  
WorkOrders  
Setup

In the example above, a search was performed with a specific phone number and the search returned with 2 different individuals. Choose the appropriate individual and click on the [Select](#) button to the left of the record to open their Prospect record. If the additional individuals are not affiliated with the current owner of the phone number, please make sure to remove the phone number from their accounts.

## 1. PROSPECT TAB

EDITING A PROSPECT

Welcome Alison Wyatt  
[Log out](#)

Hildebrand, Cathy

PROSPECT	DEMOGRAPHICS	TOURS	TOUR PACKAGES	USER FIELDS	FINANCIALS
CONTRACTS	RESERVATIONS	EVENTS	NOTES	PERSONNEL	REFERRALS
UPLOADED FILES					

ProspectID: 6967532 (empty)

Last Name: Hildebrand (empty)

Middle Init: (empty)

First Name: Cathy

Salutation: (empty)

Company:

Title:

Referrer: 0

Date Referred:

(empty)

Fed DNC List: ☐

Website Info

SAVE PROSPECT

Email(s): [Add Email](#)

Select	ID	Email	Primary	Active
<a href="#">Edit</a>	15752555	childebrand1@earthlink.net	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Home  
TimeClock  
Accounting  
Prospects  
Contracts  
Mortgages  
Tours  
Packages  
Reservations  
Property Management  
Reports  
Personnel  
Add-Ins  
WorkOrders  
Setup

The information that you will find in the Prospect record can be located in several different sections of the record.

On the main PROSPECT TAB, you will have the primary account holder's name, email address(es), record status – which includes if the individual has requested to be on a DO NOT CALL list and Website Info. The Website Info button is only applicable to owners at KCP. The pop up box will indicate whether the owner has created an online account or not. If they have, the information below will be displayed. This will include their User Name, Date Created, if they have validated their account and the email address they used when creating the account (please note that if information is resent to owner about the account, the address below is the one used for sending emails, not the one(s) listed in the main PROSPECT TAB.

If the owner has not yet created an online account, the pop up box will display the information shown below:

## 2. DEMOGRAPHICS TAB

**EDITING A PROSPECT**

Welcome Alison Wyatt  
[Log out](#)

Hildebrand, Cathy

**DEMOGRAPHICS**

Birth Date: 9/24/1953

Marital Status: Single

Spouse First Name:

Spouse Last Name:

Spouse SSN:

Occupation: (empty)

Income: 0.0000

Income/Debt: 0

Credit Score: 0

Spouse Credit Score: 0

SSN: 467765260

Drivers License:

Drivers License State: (empty)

Print Envelope

SAVE PROSPECT

Phone Numbers: [Add Phone Number](#)

Select	ID	Number	Extension	Type	Active
<a href="#">Edit</a>	3654103	7128735542	0		<input checked="" type="checkbox"/>
<a href="#">Edit</a>	13257478	4156645267	0	WORK	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	13258099	7573456793	0	HOME	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	15754051		0		<input type="checkbox"/>
<a href="#">Edit</a>	15754701		0		<input type="checkbox"/>

Addresses: [Add Address](#)

Select	ID	Address1	Address2	City	State	Zip	Country
<a href="#">Edit</a>	15195834	2032 15th Ave		San Francisco	CA	94116	

The DEMOGRAPHICS TAB will have the phone numbers, addresses, SSN, marital status and spouse's information. This is where you would want to modify, add or remove demographic information for the individual

### 3. CONTRACTS TAB

Editing a Prospect - Windows Internet Explorer

http://crms.kingscreekplantation....

Editing a Prospect x Editing a Prospect Editing A Reservation

File Edit View Favorites Tools Help

Editing a Prospect (2) Editing a Prospect CRMS Web Slice Gallery

EDITING A PROSPECT

Welcome Alison Wyatt  
[Log out](#)

Home  
TimeClock  
Accounting  
Prospects  
Contracts  
Mortgages  
Tours  
Packages  
Reservations  
Property Management  
Reports  
Personnel  
Add-Ins  
WorkOrders  
Setup

Hildebrand, Cathy

PROSPECT DEMOGRAPHICS TOURS TOUR PACKAGES USER FIELDS FINANCIALS

CONTRACTS RESERVATIONS EVENTS NOTES PERSONNEL REFERRALS UPLOADED FILES

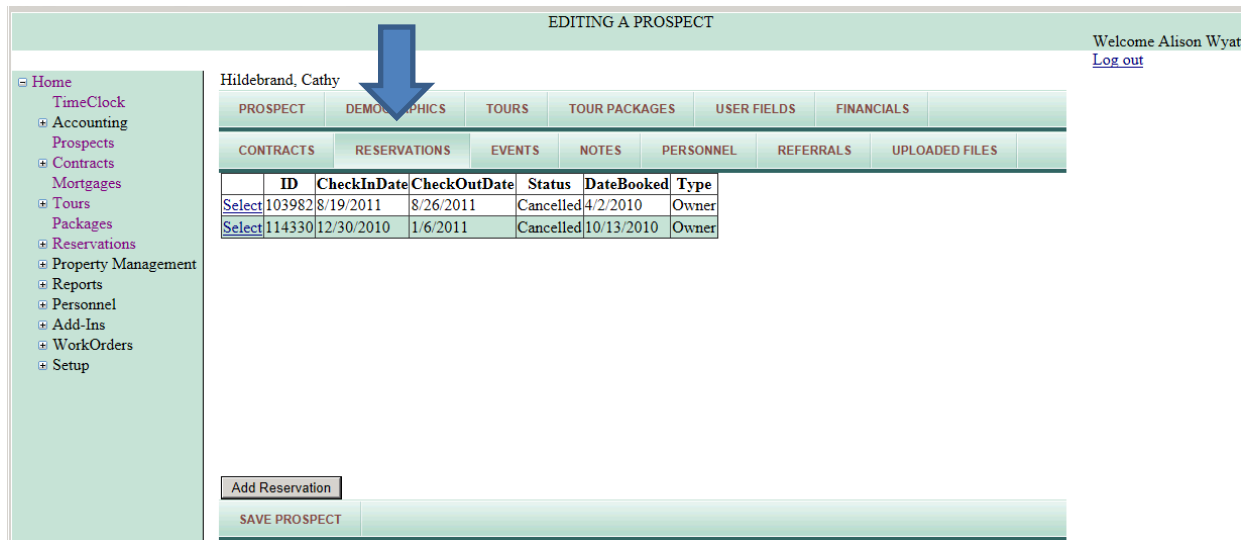
Select	ContractID	KCP Number	Status
<a href="#">Edit</a>	267631	A20925	Suspense

New Contract

SAVE PROSPECT

The CONTRACTS TAB will list all contracts associated with the specific prospect. From here you can see how many contracts owner has both currently and in the past, the contract numbers and statuses. By clicking on the [Edit](#) link, you will navigate away from the Prospect record into the Contract record. This tab can also be used at a glance to make sure that all contracts belonging to the owner are listed on the same contract. In the example above, the only contract listed is A20925 which should indicate to you that the owner has more than one prospect. Contracts beginning with the letter “A” are upgrades, which means owner had another contract prior to this one that they upgraded from. You would need to do a search to find the owner’s other prospect so that you could place a work order to request a merge if needed.

## 4. RESERVATIONS TAB



EDITING A PROSPECT

Welcome Alison Wyatt  
[Log out](#)

Hildebrand, Cathy

PROSPECT DEMOGRAPHICS TOURS TOUR PACKAGES USER FIELDS FINANCIALS

CONTRACTS RESERVATIONS EVENTS NOTES PERSONNEL REFERRALS UPLOADED FILES

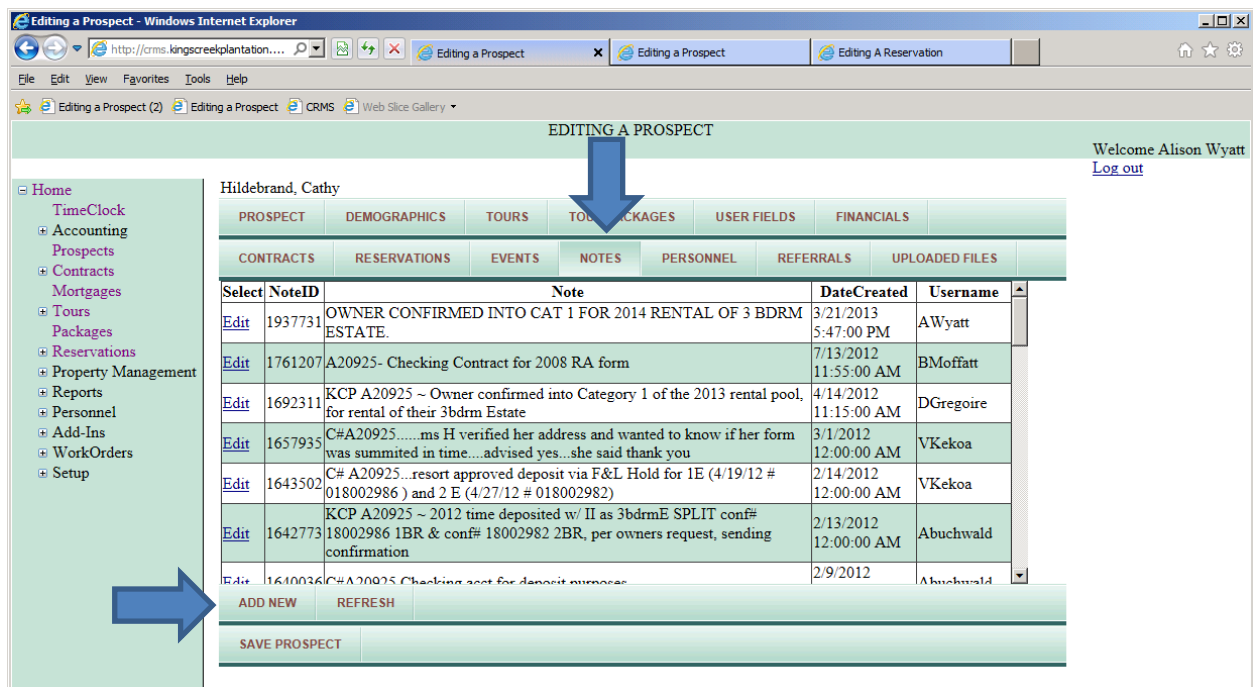
Select	ID	CheckInDate	CheckOutDate	Status	DateBooked	Type
<a href="#">Select</a>	103982	8/19/2011	8/26/2011	Cancelled	4/2/2010	Owner
<a href="#">Select</a>	114330	12/30/2010	1/6/2011	Cancelled	10/13/2010	Owner

Add Reservation

SAVE PROSPECT

The RESERVATIONS TAB will list all reservations associated with the specific prospect. The reservation type, status, check in/out dates and date booked will all be listed. By clicking on the [Edit](#) link, you will navigate away from the Prospect record into the Reservation record. This is also where you would create a reservation for your customer.

## 5. NOTES TAB



Editing a Prospect - Windows Internet Explorer

http://crms.kingscreekplantation....

File Edit View Favorites Tools Help

Editing a Prospect (2) Editing a Prospect CRMS Web Slice Gallery

EDITING A PROSPECT

Welcome Alison Wyatt  
[Log out](#)

Hildebrand, Cathy

PROSPECT DEMOGRAPHICS TOURS TOUR PACKAGES USER FIELDS FINANCIALS

CONTRACTS RESERVATIONS EVENTS NOTES PERSONNEL REFERRALS UPLOADED FILES

Select	NoteID	Note	DateCreated	Username
<a href="#">Edit</a>	1937731	OWNER CONFIRMED INTO CAT 1 FOR 2014 RENTAL OF 3 BDRM ESTATE.	3/21/2013 5:47:00 PM	AWyatt
<a href="#">Edit</a>	1761207	A20925- Checking Contract for 2008 RA form	7/13/2012 11:55:00 AM	BMoffatt
<a href="#">Edit</a>	1692311	KCP A20925 ~ Owner confirmed into Category 1 of the 2013 rental pool, for rental of their 3bdrm Estate	4/14/2012 11:15:00 AM	DGregoire
<a href="#">Edit</a>	1657935	C#A20925.....ms H verified her address and wanted to know if her form was submitted in time....advised yes....she said thank you	3/1/2012 12:00:00 AM	VKekoa
<a href="#">Edit</a>	1643502	C# A20925...resort approved deposit via F&L Hold for 1E (4/19/12 # 018002986 ) and 2 E (4/27/12 # 018002982)	2/14/2012 12:00:00 AM	VKekoa
<a href="#">Edit</a>	1642773	KCP A20925 ~ 2012 time deposited w/ II as 3bdrmE SPLIT conf# 18002986 1BR & conf# 18002982 2BR, per owners request, sending confirmation	2/13/2012 12:00:00 AM	Abuchwald
<a href="#">Edit</a>	1640036	C#A20925 Checking acct for deposit purposes	2/9/2012	Abuchwald

ADD NEW REFRESH

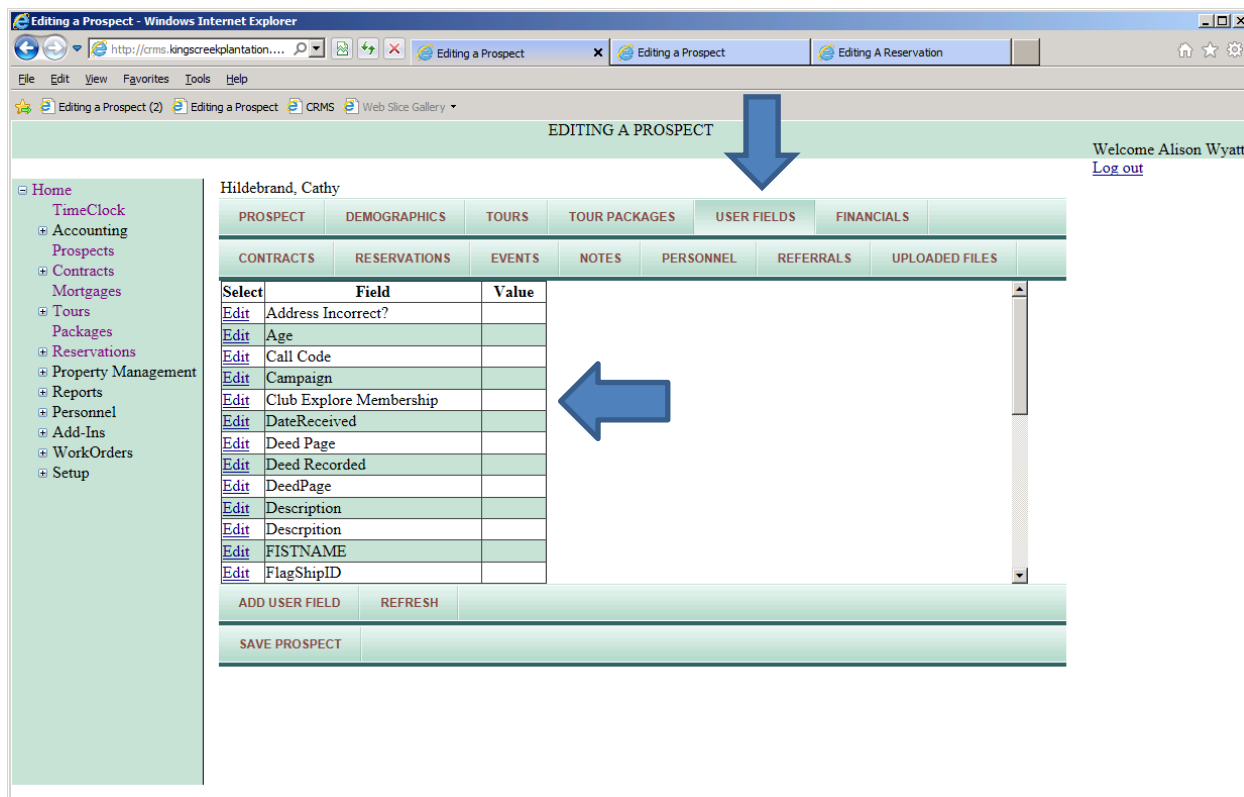
SAVE PROSPECT

The NOTES TAB will display all notes tied to the individual's prospect from newest to oldest. The date the note was created and who created the note will be listed on the right side of the screen. While the [Edit](#) link is displayed next to each individual note, you may only edit a record if you created the original



note within the last 24 hours. After that time period, notes can no longer be modified. This is also where you would add any notes pertaining specifically to the prospect. This is accomplished by clicking on the “**ADD NEW**” tab on the bottom, left of the screen.

## 6.USER FIELDS TAB

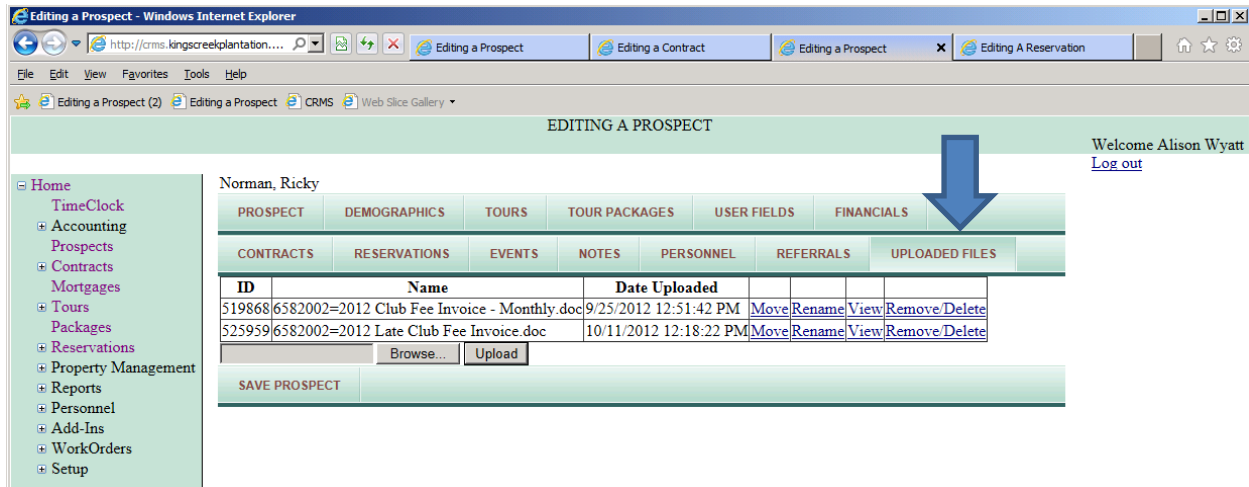


The screenshot shows a web browser window titled "Editing a Prospect - Windows Internet Explorer". The address bar shows "http://crms.kingscreekplantation....". The browser has several tabs open: "Editing a Prospect", "Editing a Prospect", and "Editing A Reservation". The main content area is titled "EDITING A PROSPECT" and displays a sidebar on the left with a navigation menu. The sidebar includes links for Home, TimeClock, Accounting, Prospects, Contracts, Mortgages, Tours, Packages, Reservations, Property Management, Reports, Personnel, Add-Ins, WorkOrders, and Setup. The main content area shows a table with columns for PROSPECT, DEMOGRAPHICS, TOURS, TOUR PACKAGES, USER FIELDS, FINANCIALS, and UPLOADED FILES. The "USER FIELDS" tab is selected, and a table of user fields is displayed. The table has columns for "Select", "Field", and "Value". The fields listed are: Address Incorrect?, Age, Call Code, Campaign, Club Explore Membership, DateReceived, Deed Page, Deed Recorded, DeedPage, Description, Description, FISTNAME, and FlagShipID. Each field has an "Edit" link next to it. A blue arrow points to the "Edit" link for the "Club Explore Membership" field. Below the table, there are buttons for "ADD USER FIELD", "REFRESH", and "SAVE PROSPECT".

PROSPECT	DEMOGRAPHICS	TOURS	TOUR PACKAGES	USER FIELDS	FINANCIALS	UPLOADED FILES
CONTRACTS	RESERVATIONS	EVENTS	NOTES	PERSONNEL	REFERRALS	UPLOADED FILES
Select	Field	Value				
<a href="#">Edit</a>	Address Incorrect?					
<a href="#">Edit</a>	Age					
<a href="#">Edit</a>	Call Code					
<a href="#">Edit</a>	Campaign					
<a href="#">Edit</a>	Club Explore Membership					
<a href="#">Edit</a>	DateReceived					
<a href="#">Edit</a>	Deed Page					
<a href="#">Edit</a>	Deed Recorded					
<a href="#">Edit</a>	DeedPage					
<a href="#">Edit</a>	Description					
<a href="#">Edit</a>	Description					
<a href="#">Edit</a>	FISTNAME					
<a href="#">Edit</a>	FlagShipID					
ADD USER FIELD		REFRESH				
SAVE PROSPECT						

The USER FIELDS TAB will provide you with various pieces of information. As an Owner Services representative, the ones that you would be concerned with are as follows: Club Explore Membership, ICE Membership Number, II Membership Number and RCI Membership Number. These fields can be updated at any time by clicking on the [Edit](#) link next to the User Field you want to modify. A pop up will appear and you can add, delete or change the current information listed.

## 7.UPLOADED FILES TAB



EDITING A PROSPECT

Welcome Alison Wyatt  
[Log out](#)

Norman, Ricky

PROSPECT DEMOGRAPHICS TOURS TOUR PACKAGES USER FIELDS FINANCIALS

CONTRACTS RESERVATIONS EVENTS NOTES PERSONNEL REFERRALS **UPLOADED FILES**

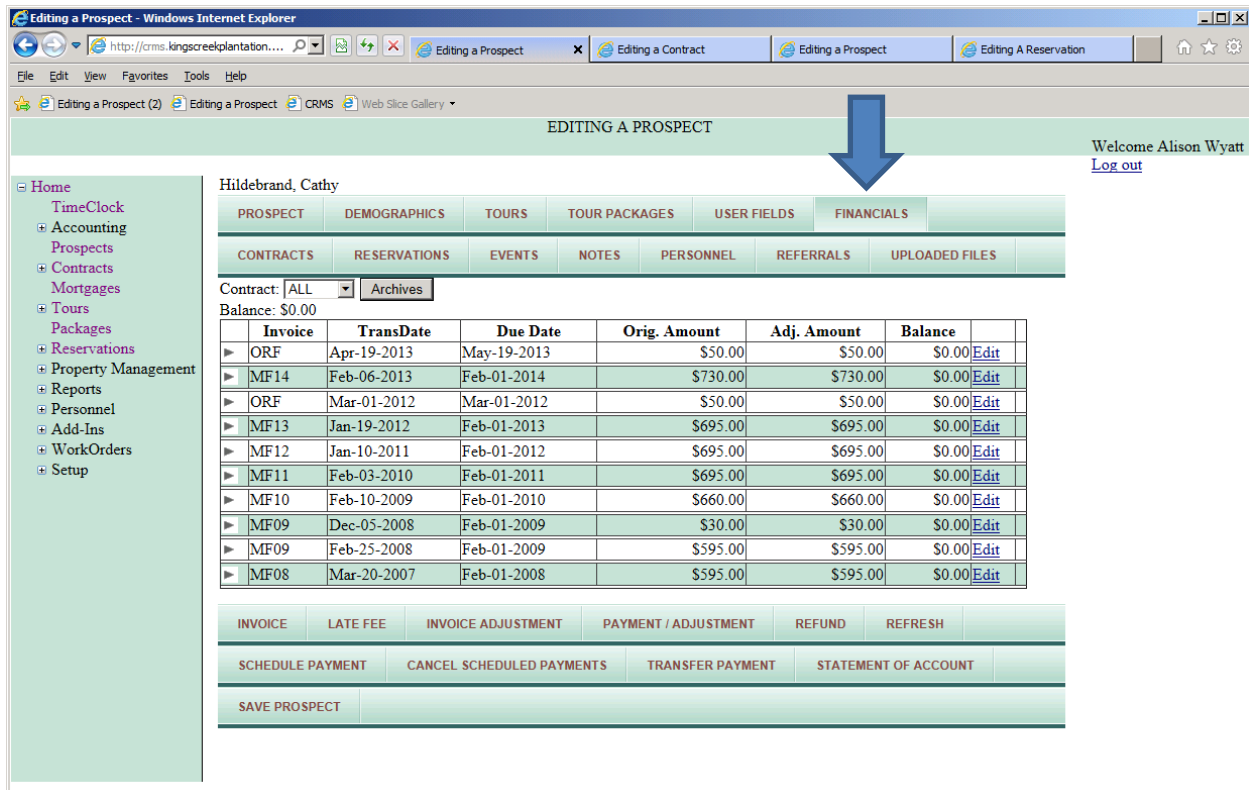
ID	Name	Date Uploaded					
519868	6582002=2012 Club Fee Invoice - Monthly.doc	9/25/2012 12:51:42 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove</a>	<a href="#">Delete</a>
525959	6582002=2012 Late Club Fee Invoice.doc	10/11/2012 12:18:22 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove</a>	<a href="#">Delete</a>

Browse... Upload

SAVE PROSPECT

The UPLOADED FILES TAB will contain any scanned, uploaded documents that relate to the Prospect record. Currently, you will find copies of the Club Explore Invoice and Late Club Fee Invoice. You can View, Rename or Move the documents.

## 8.FINANCIALS TAB



EDITING A PROSPECT

Welcome Alison Wyatt  
[Log out](#)

Hildebrand, Cathy

PROSPECT DEMOGRAPHICS TOURS TOUR PACKAGES USER FIELDS **FINANCIALS**

CONTRACTS RESERVATIONS EVENTS NOTES PERSONNEL REFERRALS UPLOADED FILES

Contract:

Balance: \$0.00

	Invoice	TransDate	Due Date	Orig. Amount	Adj. Amount	Balance	
▶	ORF	Apr-19-2013	May-19-2013	\$50.00	\$50.00	\$0.00	<a href="#">Edit</a>
▶	MF14	Feb-06-2013	Feb-01-2014	\$730.00	\$730.00	\$0.00	<a href="#">Edit</a>
▶	ORF	Mar-01-2012	Mar-01-2012	\$50.00	\$50.00	\$0.00	<a href="#">Edit</a>
▶	MF13	Jan-19-2012	Feb-01-2013	\$695.00	\$695.00	\$0.00	<a href="#">Edit</a>
▶	MF12	Jan-10-2011	Feb-01-2012	\$695.00	\$695.00	\$0.00	<a href="#">Edit</a>
▶	MF11	Feb-03-2010	Feb-01-2011	\$695.00	\$695.00	\$0.00	<a href="#">Edit</a>
▶	MF10	Feb-10-2009	Feb-01-2010	\$660.00	\$660.00	\$0.00	<a href="#">Edit</a>
▶	MF09	Dec-05-2008	Feb-01-2009	\$30.00	\$30.00	\$0.00	<a href="#">Edit</a>
▶	MF09	Feb-25-2008	Feb-01-2009	\$595.00	\$595.00	\$0.00	<a href="#">Edit</a>
▶	MF08	Mar-20-2007	Feb-01-2008	\$595.00	\$595.00	\$0.00	<a href="#">Edit</a>

INVOICE LATE FEE INVOICE ADJUSTMENT PAYMENT / ADJUSTMENT REFUND REFRESH

SCHEDULE PAYMENT CANCEL SCHEDULED PAYMENTS TRANSFER PAYMENT STATEMENT OF ACCOUNT

SAVE PROSPECT

The FINANCIALS TAB is where you will access an owner's Maintenance Fee billing and payment history, Club Fee billing and payment history and any other fees associated with being an owner at KCP. Redeed fees, rental listing fees and Admin fees would also be included in the list. All payments would be processed here. By leaving the contract pull down on ALL, the system will display all financial records for

individual. To view only those financial records tied to a specific contract, you would choose the contract in question from the drop down menu.

There are 2 types of financials to be found under Financials in the Prospect, all financials tied to the Prospect itself and those tied to the individual Contracts. Contract financials would include invoices such as Maintenance fees and late fees, Administration fees, Legal fees, Transfer fees and ORF (Owner Rental Fee). Prospect Financials would include Club fees and late fees, Banking fees and Borrowing fees. A payment cannot be processed unless there is a corresponding invoice in the system. To apply payment to a contract fee, you must be in the contract financials to process. To apply payment to a prospect fee, you must be in the prospect financials.

EDITING A PROSPECT
Welcome Alison Wyatt  
[Log out](#)

- Home
- TimeClock
- Accounting
- Prospects
- Contracts
- Mortgages
- Tours
- Packages
- Reservations
- Property Management
- Reports
- Personnel
- Add-Ins
- WorkOrders
- Setup

Pinzon, Dimas

PROSPECT  
CONTRACTS

DEMOGRAPHICS  
RESERVATIONS

TOURS  
EVENTS

TOUR PACKAGES  
NOTES

USER FIELDS  
PERSONNEL

FINANCIALS  
REFERRALS

UPLOADED FILES

Contract: 22778  
Balance: \$2,120.00

Archives

Invoice	TransDate	Due Date	Orig. Amount	Adj. Amount	Balance	
LATE FEE	Feb-11-2013	Feb-11-2013	\$50.00	\$50.00	\$50.00	<a href="#">Edit</a>
MF14	Feb-06-2013	Feb-01-2014	\$1,060.00	\$1,060.00	\$1,060.00	<a href="#">Edit</a>
MF13	Jan-19-2012	Feb-01-2013	\$1,010.00	\$1,010.00	\$1,010.00	<a href="#">Edit</a>
MF12	Jan-10-2011	Feb-01-2012	\$1,010.00	\$1,010.00	\$0.00	<a href="#">Edit</a>
MF11	Feb-03-2010	Feb-01-2011	\$1,010.00	\$1,010.00	\$0.00	<a href="#">Edit</a>
MF10	Feb-10-2009	Feb-01-2010	\$910.00	\$910.00	\$0.00	<a href="#">Edit</a>
LATE FEE	Feb-02-2009	Feb-02-2009	\$50.00	\$50.00	\$0.00	<a href="#">Edit</a>
MF09	Dec-05-2008	Feb-01-2009	\$40.00	\$40.00	\$0.00	<a href="#">Edit</a>
MF09	Feb-25-2008	Feb-01-2009	\$795.00	\$795.00	\$0.00	<a href="#">Edit</a>
MF08	Dec-18-2007	Feb-01-2008	\$795.00	\$795.00	\$0.00	<a href="#">Edit</a>

INVOICE

INVOICE ADJUSTMENT

PAYMENT / ADJUSTMENT

REFUND

REFRESH

SCHEDULE PAYMENT

CANCEL SCHEDULED PAYMENTS

TRANSFER PAYMENT

STATEMENT OF ACCOUNT

SAVE PROSPECT

Please note that when taking a payment that applies to more than one invoice, the system will apply the payment towards the oldest invoice that you choose. For example, if a triennial owner wishes to pay a third of their maintenance fee and their late fee, leaving a balance of two thirds on the maintenance fee invoice and you choose both invoices to apply payment to, the system will assign the full amount to the maintenance invoice as it was created first. To determine which invoice was created first, refer back to the invoice ID. The smallest number is the oldest invoice.

http://crms.kingscreekplantation.com/crmsnet/general/takepayment.aspx?ProspectID=8209349&...

Charge Force Manual Voice Auth

Swipe:  [Card\(s\) on file](#)

Card Number:  Expiration (MMYY):

CVV2:  Name On Card:

Billing Address:  City:

State:  Postal Code:

Amount:

Description:

Authorization:

	ID	Acct	Invoice	TransDate	Amount	Balance
<input checked="" type="checkbox"/>	197658	1	MF13	1/19/2012 12:00:00 AM	1,010.00	1,010.00
<input type="checkbox"/>	39120	1	MF14	2/6/2013 12:36:52 PM	1,060.00	1,060.00
<input checked="" type="checkbox"/>	39115	1	LATE FEE	2/11/2013 12:28:31 PM	50.00	50.00

## CREATING AN INVOICE

Creating an invoice for a prospect or for a contract only differ in whether you choose All next to the Contract drop down or choose a contract number.

Once you have determined what type of invoice you are creating and that it is appropriate, you will click on the Invoice button and a pop up will appear. Below, owner is calling in to prepay 2013 club fee that has not yet been invoiced.

EDITING A PROSPECT

Rose, Donald

PROSPECT	DEMOGRAPHICS	TOURS	TOUR PACKAGES	USER FIELDS	FINANCIALS	CREDIT CARDS
CONTRACTS	RESERVATIONS	EVENTS	NOTES	PERSONNEL	REFERRALS	UPLOADED FILES

Contract:

Balance: \$0.00

	Invoice	TransDate	Due Date	Orig. Amount	Adj. Amount	Balance	
▶	CD12	Jul-03-2012	Aug-03-2012	\$179.00	\$179.00	\$0.00	<a href="#">Edit</a>
▶	MF13	Jan-19-2012	Feb-01-2013	\$965.00	\$965.00	\$0.00	<a href="#">Edit</a>
▶	MF13	Jan-19-2012	Feb-01-2013	\$1,040.00	\$1,040.00	\$0.00	<a href="#">Edit</a>
▶	MF12	Jan-10-2011	Feb-01-2012	\$965.00	\$965.00	\$0.00	<a href="#">Edit</a>
▶	MF12	Jan-10-2011	Feb-01-2012	\$1,040.00	\$1,040.00	\$0.00	<a href="#">Edit</a>
▶	MF11	Jul-01-2010	Feb-01-2011	\$1,040.00	\$1,040.00	\$0.00	<a href="#">Edit</a>
▶	MF11	Feb-03-2010	Feb-01-2011	\$965.00	\$965.00	\$0.00	<a href="#">Edit</a>
▶	MF10	Jun-19-2009	Feb-01-2010	\$900.00	\$900.00	\$0.00	<a href="#">Edit</a>

INVOICE	LATE FEE	INVOICE ADJUSTMENT	PAYMENT / ADJUSTMENT	REFUND	REFRESH
SCHEDULE PAYMENT	CANCEL SCHEDULED PAYMENTS	TRANSFER PAYMENT	STATEMENT OF ACCOUNT		
SAVE PROSPECT					

Once the pop up appears, you will need to fill out the correct information. Trans Code should be the name of the invoice you are creating. Amount is the amount of the invoice. Please note that should an owner call in to pay a portion of the amount that will be due, you would still create the invoice for the full amount. Reference should indicate why you are billing. Trans Date should be the date that you created the invoice. Due date will default to 30 days from Trans Date. If you are creating an invoice that is due in the future (such as a maintenance fee) you need to enter the Due Date as the date that it is due per company rules. In this case, MF14 is due 02/01/14 so your Due Date is the same. It is important to enter the correct due date so that an owner does not get invoiced a late fee incorrectly.

## **APPLYING PAYMENT TO AN INVOICE**

Once the invoice is created you can now apply the payment by clicking on the Payment/Adjustment button.

EDITING A PROSPECT

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Rose, Donald

PROSPECT	DEMOGRAPHICS	TOURS	TOUR PACKAGES	USER FIELDS	FINANCIALS	CREDIT CARDS
CONTRACTS	RESERVATIONS	EVENTS	NOTES	PERSONNEL	REFERRALS	UPLOADED FILES

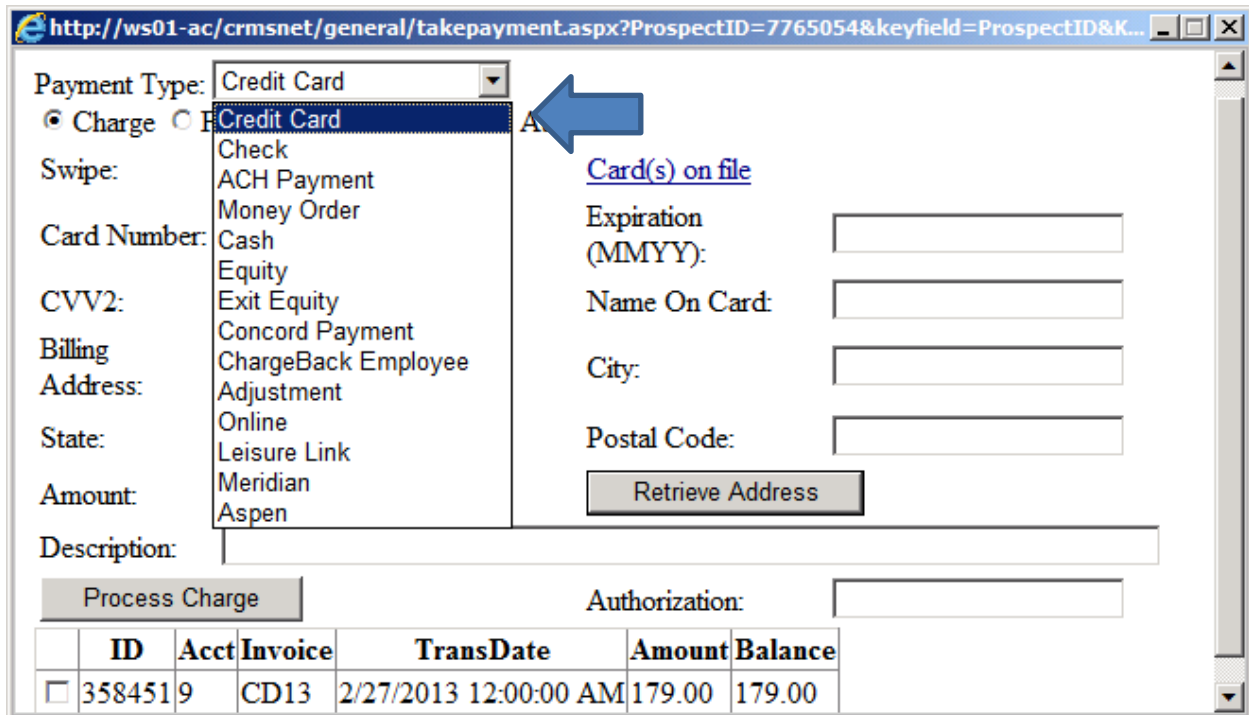
Contract: ALL Archives

Balance: \$179.00

	Invoice	TransDate	Due Date	Orig. Amount	Adj. Amount	Balance	
▶	CD13	Feb-27-2013	Aug-01-2013	\$179.00	\$179.00	\$179.00	<a href="#">Edit</a>
▶	CD12	Jul-03-2012	Aug-03-2012	\$179.00	\$179.00	\$0.00	<a href="#">Edit</a>
▶	MF13	Jan-19-2012	Feb-01-2013	\$965.00	\$965.00	\$0.00	<a href="#">Edit</a>
▶	MF13	Jan-19-2012	Feb-01-2013	\$1,040.00	\$1,040.00	\$0.00	<a href="#">Edit</a>
▶	MF12	Jan-10-2011	Feb-01-2012	\$965.00	\$965.00	\$0.00	<a href="#">Edit</a>
▶	MF12	Jan-10-2011	Feb-01-2012	\$1,040.00	\$1,040.00	\$0.00	<a href="#">Edit</a>
▶	MF11	Jul-01-2010	Feb-01-2011	\$1,040.00	\$1,040.00	\$0.00	<a href="#">Edit</a>
▶	MF11	Feb-03-2010	Feb-01-2011	\$965.00	\$965.00	\$0.00	<a href="#">Edit</a>
▶	MF10	Jun-19-2009	Feb-01-2010	\$900.00	\$900.00	\$0.00	<a href="#">Edit</a>

INVOICE	LATE FEE	INVOICE ADJUSTMENT	PAYMENT / ADJUSTMENT	REFUND	REFRESH
SCHEDULE PAYMENT	CANCEL SCHEDULED PAYMENTS	TR	PAYMENT	STATEMENT OF ACCOUNT	
SAVE PROSPECT					

A pop up box will appear and you will need to choose the appropriate Payment Type. Once you have done this, the system will modify the pop up to only display the required information. Much more information is needed for a credit card payment then for a check payment.



http://ws01-ac/crmsnet/general/takepayment.aspx?ProspectID=7765054&keyfield=ProspectID&K...

Payment Type: **Credit Card**

☒ Charge ☐ Bill

Swipe: ☐ Credit Card ☐ Check

Card Number:

CVV2:

Billing Address:

State:

Amount:

Description:

[Card\(s\) on file](#)

Expiration (MMYY):

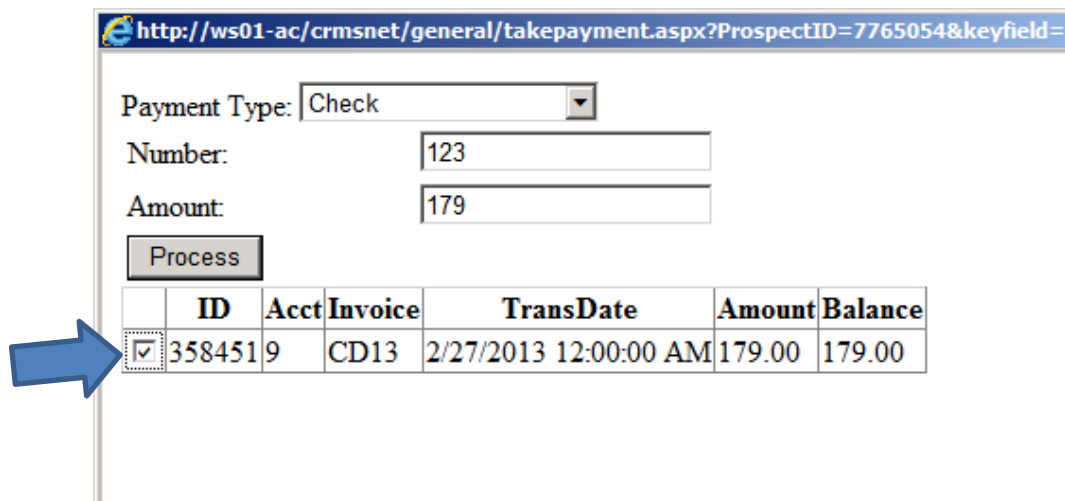
Name On Card:

City:

Postal Code:

Authorization:

	ID	Acct	Invoice	TransDate	Amount	Balance
<input type="checkbox"/>	358451	9	CD13	2/27/2013 12:00:00 AM	179.00	179.00



http://ws01-ac/crmsnet/general/takepayment.aspx?ProspectID=7765054&keyfield=

Payment Type: **Check**

Number:

Amount:

	ID	Acct	Invoice	TransDate	Amount	Balance
<input checked="" type="checkbox"/>	358451	9	CD13	2/27/2013 12:00:00 AM	179.00	179.00

Once all the appropriate information is entered, click in the box next to the invoice you are applying the payment to. Your final step is to click on the Process button and the payment will run. A receipt will be generated automatically at time of payment. Only print the invoice if owner request. Please make sure to double check that the payment processed if using a credit card by verifying the balance or by looking at the response on the invoice.

http://crms.kingscreekplantation.com/crmsnet/general/Receipt.aspx?id=398754 - Windows Intern...  
757-873-4005

Rodney James  
po box 296  
Tennile, GA 31089

8/26/2013 2:55:32 PM  
MER#: CZAR MERCHANT ACCT  
TER#: 0001  
S-A-L-E-S D-R-A-F-T  
REF: D ACCOUNT NUMBER,,8009902265,  
BATCH: 295  
CD Type: Visa  
TR Type: Charge  
No Show/NQ Fee - Czar \$90.00  
\$90.00

## EDITING YOUR PROSPECT

Never change the name on a Prospect record if a contract is tied to it. The name and spelling of it must ALWAYS match what is on the deed. A copy of the deed should be uploaded in the Uploaded Docs tab in the Contract record. If there are two owners on the deed, you may change who is primary or secondary in CRMS but all information tied to the individual must also be moved/updated.

EDITING A PROSPECT

Welcome Alison Wyatt  
[Log out](#)

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- Tours
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- Setup

Norman, Ricky

PROSPECT	DEMOGRAPHICS	TOURS	TOUR PACKAGES	USER FIELDS	FINANCIALS	
CONTRACTS	RESERVATIONS	EVENTS	NOTES	PERSONNEL	REFERRALS	UPLOADED FILES

ProspectID:  Type:

Last Name:  Sub-Type:

Middle Init:  Status:

First Name:

Salutation:

Company:

Title:

Referrer:

Date Referred:

Source:

Fed DNC List: ☐

[Website Info](#)

[SAVE PROSPECT](#)

Email(s): [Add Email](#)

Select	ID	Email	Primary	Active
<a href="#">Edit</a>	16145113	rickynorman33@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

14 | Page

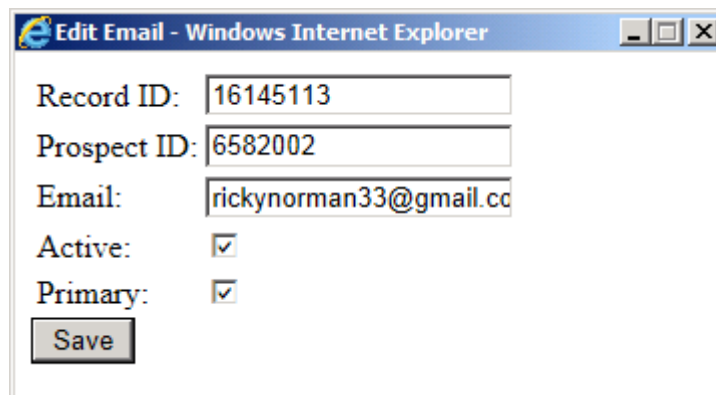
## **1.EMAIL ADDRESS**

To add a new email to an account, follow the steps below:

1. Click on [Add Email](#)
2. When pop up box opens, add email address in appropriate box. Only enter 1 email per pop up box. If owner has 3 emails that they want added to the account, they must be added separately.
3. Click in box next to Active – this is necessary so that email is included in any email correspondence
4. Click in box next to Primary if owner wishes this to be primary email on account.
5. Click on Save
6. Email will be added to account.

To edit an existing email on account, follow the steps below:

1. Click on [Edit](#) next to the email in question.
2. When pop up box opens (as seen below) you may update the information.
  - a. Spelling
  - b. Active
  - c. Primary
3. If an owner calls in and states that the email on file is no longer valid, simply uncheck the Active and Primary options. Now add a new email account to the record. By leaving the old email address in the record, we maintain a history of the email accounts that have been used by the owner.



The screenshot shows a web browser window titled "Edit Email - Windows Internet Explorer". Inside the window is a form with the following fields and values:

- Record ID: 16145113
- Prospect ID: 6582002
- Email: rickynorman33@gmail.com
- Active: ☒
- Primary: ☒
- Save button

## **2.PHONE NUMBERS**

Never use dashes when entering a customer's phone number. If you see this in an individual's record, please correct by removing dashes.

Please note – if you see that the individual has the same phone number listed multiple times, please update the record s by removing the duplicates. The screen shot below has the same phone number listed twice, both coded as HOME. To remove a duplicate follow these steps:



1. Click on [Edit](#) next to duplicate record under Phone Numbers list
2. Delete Number and Extension.
3. Set Type back to (empty)
4. Uncheck Active box (if checked)

Note: this is why you would have available slots in the Phone Number list.

Editing a Prospect - Windows Internet Explorer

http://crms.kingscreek... Editing a Prospect Quick Check Availability Editing a Prospect Editing a Prospect

File Edit View Favorites Tools Help

Editing a Prospect (2) Editing a Prospect CRMS Web Slice Gallery

EDITING A PROSPECT

Welcome Alison Wyatt [Log out](#)

Norman, Ricky

PROSPECT DEMOGRAPHICS TOURS TOUR PACKAGES USER FIELDS FINANCIALS

CONTRACTS RESERVATIONS EVENTS NOTES PERSONNEL REFERRALS UPLOADED FILES

Birth Date:

Marital Status:

Spouse First Name:

Spouse Last Name:

Spouse SSN:

Occupation:

Income:

Income/Debt:

Credit Score:

Spouse Credit Score:

SSN:

Drivers License:

Drivers License State:

Phone Numbers: [Add Phone Number](#)

Select	ID	Number	Extension	Type	Active
<a href="#">Edit</a>	12849184	7575357338	0	HOME	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	12849243	7575804833	0	MOBILE	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	15346297	7575357338	0	HOME	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	4565302		0		<input type="checkbox"/>
<a href="#">Edit</a>	15346299		0		<input type="checkbox"/>

Addresses: [Add Address](#)

Select	ID	Address1	Address2	City	State	Zip	Country
<a href="#">Edit</a>	14810321	P.O. Box 2023		Norfolk	VA	23501	USA

[Print Envelope](#)

[SAVE PROSPECT](#)

To add a new phone number to an account, follow the steps below:

#### OPTION 1 – Prospect Record with available slots

1. Click on [Edit](#) next to blank record under Phone Numbers list
2. When pop up box opens (as seen below) you may add the information.
  - a. Phone number
  - b. Extension
  - c. Type (Home, Mobile, Work)
3. Click in box next to Active
4. Click on Save

**Edit Phone - Windows Internet Explorer**

Record ID:

Prospect ID:

Number:

Extension:

Type:

Active: ☐

**Editing a Prospect - Windows Internet Explorer**

http://crms.kingscreek... Editing a Prospect Quick Check Availability Editing a Prospect x Editing A Reservation

File Edit View Favorites Tools Help

Editing a Prospect (2) Editing a Prospect CRMS Web Slice Gallery

**EDITING A PROSPECT** Welcome Alison Wyatt [Log out](#)

**Wyatt, Alison**

**PROSPECT** **DEMOGRAPHICS** **TOURS** **TOUR PACKAGES** **USER FIELDS** **FINANCIALS**

**CONTRACTS** **RESERVATIONS** **EVENTS** **NOTES** **PERSONNEL** **REFERRALS** **UPLOADED FILES**

Birth Date:

Marital Status:

Spouse First Name:

Spouse Last Name:

Spouse SSN:

Occupation:

Income:

Income/Debt:

Credit Score:

Spouse Credit Score:

SSN:

Drivers License:

Drivers License State:

Phone Numbers: [Add Phone Number](#)

Addresses: [Add Address](#)

Select	ID	Address1	Address2	City	State	Zip	Country
<a href="#">Edit</a>	16779557	846 Weston Court		Newport News	VA	23608	USA

## OPTION 2 – Prospect Record with no available slots

1. Click on [Add Phone Number](#)
2. When pop up box opens, you may add the information
  - a. Phone number
  - b. Extension
  - c. Type (Home, Mobile, Work)
3. Click in box next to Active
4. Click on Save

Repeat process as needed.

### **3.ADDRESS**

To remove an existing address from account, follow the steps below:

1. Click on [Edit](#) next to the address in question
2. When pop up box opens, you must uncheck the Active and Contract Address boxes
3. Do not overwrite an address or delete. This allows us to keep a history of all addresses used by individual
4. Click on Save

To add a new address to an account, follow the steps below:

1. Click on [Add Address](#)
2. When pop up box opens (as seen below) you may add the information
  - a. Address 1 (Street Number, Name and Unit Number)
  - b. Address 2 (Additional information)
  - c. City
  - d. State
  - e. Postal Code/Zip Code
  - f. Country – Use if outside of USA
  - g. Type (Billing, Familiar, Legal)
3. Click in box next to Active
4. Click in box next to Contract if this is address for contract holder
5. Click on Save

The screenshot shows a web browser window titled "Untitled Page - Windows Internet Explorer". Inside the browser is a form for adding a new address. The form has the following fields and controls:

- AddressID:** A text input field containing the value "0".
- ProspectID:** A text input field containing the value "6282080".
- Active:** A checkbox that is currently unchecked.
- Address 1:** A text input field.
- Address 2:** A text input field.
- City:** A text input field.
- State:** A dropdown menu with "(empty)" selected.
- Postal Code:** A text input field.
- Region:** A text input field.
- Country:** A dropdown menu with "(empty)" selected.
- Type:** A dropdown menu with "(empty)" selected.
- Contract Address:** A checkbox that is currently unchecked.
- Save:** A button at the bottom left of the form.

To modify an existing address in account, follow the steps below:

1. Click on [Edit](#) next to the address in question
2. When pop up box opens, correct information as needed
3. Click on Save

## **CORRECTING INFORMATION**

Take the opportunity to correct any incorrect information when in the individual's record. For example, in the screen shot below, the spouse's full name is under Spouse First Name section. To correct, highlight the last name and drag it to the Spouse Last Name box. Click on **"SAVE PROSPECT"** button on bottom left of screen.

Editing a Prospect - Windows Internet Explorer

http://crms.kingscreek... Editing a Prospect Quick Check Availability Editing a Prospect x Editing A Reservation

File Edit View Favorites Tools Help

Editing a Prospect (2) Editing a Prospect CRMS Web Slice Gallery

**EDITING A PROSPECT**

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Norman, Ricky

**PROSPECT** DEMOGRAPHICS TOURS TOUR PACKAGES USER FIELDS FINANCIALS

CONTRACTS RESERVATIONS EVENTS NOTES PERSONNEL REFERRALS UPLOADED FILES

Birth Date:

Marital Status:

Spouse First Name:

Spouse Last Name:

Spouse SSN:

Occupation:

Income:

Income/Debt:

Credit Score:

Spouse Credit Score:

SSN:

Drivers License:

Drivers License State:

Phone Numbers: [Add Phone Number](#)

Select	ID	Number	Extension	Type	Active
<a href="#">Edit</a>	12849184	7575357338	0	HOME	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	12849243	7575804833	0	MOBILE	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	15346297	7575357338	0	HOME	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	4565302		0		<input type="checkbox"/>
<a href="#">Edit</a>	15346299		0		<input type="checkbox"/>

Addresses: [Add Address](#)

Select	ID	Address1	Address2	City	State	Zip	Country
<a href="#">Edit</a>	14810321	P.O. Box 2023		Norfolk	VA	23501	USA

[Print Envelope](#)

**SAVE PROSPECT**

## **CUSTOMERS WITH MULTIPLE PROSPECTS**

As much as possible, the goal is to have one Prospect record per individual. You may come across a situation where your customer has multiple records. There are multiple areas where you spot these. Once you determine that your customer does indeed have multiple Prospect records you would place a Work Order to IT to have the accounts merged.

## 1.WHEN SEARCHING FOR PROSPECT BY PHONE NUMBER

**PROSPECT SEARCH**

Filter:

Enter Home Phone:

	LastName	FirstName	ProspectID	Phone
<a href="#">Select</a>	EDWARDS	CHELSEA	8226480	7573453793
<a href="#">Select</a>	DE FRANCE	VALDEIR	8226479	7573453793
<a href="#">Select</a>			6282081	7573453793
<a href="#">Select</a>	Hildebrand	Cathy	6282080	7573453793
<a href="#">Select</a>	Hildebrand	Cathy	6967532	7573453793
<a href="#">Select</a>			6282081	7573453793

As you can see in the example above, the customer, Cathy Hildebrand is listed twice. By looking under the ProspectID column, you will be able to tell if the individual has multiple Prospect records. In this case, there are two different Prospect IDs which indicates two separate records. If the same Prospect ID was listed next to both records, you would know that the phone number was listed twice in the same record. (This is where you would delete the duplicate phone number record from the account).

## 2.WHEN SEARCHING FOR CONTRACT OWNER BY NAME

Contract Search - Windows Internet Explorer

Contract Search

CONTRACT SEARCH

Welcome Alison Wyatt  
[Log out](#)

Filter:

Enter search value:

Select	Select Owner	ID	KCP Number	Status	LastName	FirstName	LastName1	FirstName1	ProspectID
<a href="#">Edit</a>	<a href="#">Owner</a>	267631	A20925	Suspense	Hildebrand	Cathy			6282080
<a href="#">Edit</a>	<a href="#">Owner</a>	253754	11832	CXL-Upgrade	Hildebrand	Cathy			6967532

As you can see in the example above, the customer, Cathy Hildebrand is listed twice. This is because she has two contracts. By looking under the ProspectID column on the right, you will notice two different Prospect IDs which indicates two separate records.

## CREATING A NEW PROSPECT

Once you have searched by name, address, phone number and email and have determined that your customer does not already exist in the system, you must create a new prospect. For Owner Services, you might need to create a new prospect for an Owner – Non Owner reservation or a Co-Owner that is not listed as the spouse in the Demographics tab.

To create a new Prospect, go to Prospects in menu on the left. Click on the New button to the right of the Enter Home Phone box.

PROSPECT SEARCH

Welcome Alison Wyatt  
[Log out](#)

Filter: Phone

Enter Home Phone:  
7194757788 Query New

No Records

Home  
TimeClock  
Accounting  
Prospects  
Contracts  
Mortgages  
Tours  
Packages  
Reservations  
Property Management  
Reports  
Personnel  
Add-Ins  
WorkOrders  
Setup

A new prospect record will display. You must enter the Last Name and First Name and click on the Save Prospect button to create your prospect. Once you have saved your information, the system will generate a Prospect ID.

EDITING A PROSPECT

Welcome Alison Wyatt  
[Log out](#)

Pedersen, Richard

PROSPECT DEMOGRAPHICS TOURS TOUR PACKAGES USER FIELDS FINANCIALS

CONTRACTS RESERVATIONS EVENTS NOTES PERSONNEL REFERRALS UPLOADED FILES

ProspectID: 15165473 (empty)

Last Name: Pedersen (empty)

Middle Init: (empty)

First Name: Richard

Salutation: (empty)

Anniversary Date: ...

Company:

Title:

Referrer: 0

Date Referred: ...

(empty)

Fed DNC List: ☐

Website Info

SAVE PROSPECT

Email(s): [Add Email](#)

If your prospect has an email address, you would click on the [Add Email](#) link and enter your customer's email. Make sure you click on the Active box and Primary if it is their main email address.

Record ID: 0

Prospect ID: 15165473

Email: rpederson@hotmail.com

Active: ☒

Primary: ☒

Save

Next, click on the Demographics button and fill out your customer's marital status and spouse name if you have the information. The more information that you can enter in the system, the better it is for tracking purposes or if customer purchases a contract.

EDITING A PROSPECT

Welcome Alison Wyatt  
[Log out](#)

Pedersen, Richard

PROSPECT DEMOGRAPHICS TOURS TOUR PACKAGES USER FIELDS FINANCIALS

CONTRACTS RESERVATIONS EVENTS NOTES PERSONNEL REFERRALS UPLOADED FILES

Birth Date: [ ] Phone Numbers: [Add Phone Number](#)

Marital Status: Married

Spouse First Name: Jane

Spouse Last Name: Pedersen

Spouse SSN: [ ]

Occupation: (empty)

Income: 0.0000

Income/Debt: 0

Credit Score: 0

Spouse Credit Score: 0

SSN: [ ]

Drivers License: [ ]

Drivers License State: (empty)

Addresses: [Add Address](#)

Print Envelope

SAVE PROSPECT

Click on the [Add Phone Number](#) link and a pop up box will appear. Enter the phone number (extension if needed), phone number type (Home, Mobile, Work or Fax) and Active check box and then Save.

Record ID: 0

Prospect ID: 15165473

Number: 7194757788

Extension: [ ]

Type: HOME

Active: ☒

Save

Click on the [Add Address](#) link and a pop up box will appear. Make sure you check off the Active box at the top. Address 1 should be the street address. Please make sure to spell out the type of road (Street, Road, etc) do not use abbreviations. Address2 would be for additional address information, for example a business name. City, State and Postal Code (Zip Code) must also be filled out. Country only needs to be filled out if different than USA. Address Type should be Familiar (Home address), Billing (where their bills are sent) or Legal (Contract address if different than Billing or Familiar). Contract Address should only be checked off if the address is tied to an owner's contract and this is the address on record.

AddressID: 0

ProspectID: 15165473

Active: ☒

Address 1: 74 Tenderfoot Hill Street

Address 2:

City: Colorado Springs

State: CO

Postal Code: 26801

Region:

Country: USA

Type: Familiar

Contract Address: ☐

Save

You only need to click on the Save Prospect button when adding, removing or modifying information not in a pop up box.

EDITING A PROSPECT

Welcome Alison Wyatt  
[Log out](#)

Home  
TimeClock  
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Prospects  
Contracts  
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Packages  
Reservations  
Property Management  
Reports  
Personnel  
Add-Ins  
WorkOrders  
Setup

Pedersen, Richard

PROSPECT DEMOGRAPHICS TOURS TOUR PACKAGES USER FIELDS FINANCIALS

CONTRACTS RESERVATIONS EVENTS NOTES PERSONNEL REFERRALS UPLOADED FILES

Birth Date:

Marital Status: Married

Spouse First Name: Jane

Spouse Last Name: Pedersen

Spouse SSN:

Occupation: (empty)

Income: 0.0000

Income/Debt: 0

Credit Score: 0

Spouse Credit Score: 0

SSN:

Drivers License:

Drivers License State: (empty)

Phone Numbers: [Add Phone Number](#)

Select	ID	Number	Extension	Type	Active
<a href="#">Edit</a>	17451526	7194757788		HOME	<input checked="" type="checkbox"/>

Addresses: [Add Address](#)

Select	ID	Address1	Address2	City	State	Zip	Country
<a href="#">Edit</a>	16797096	2874 Tenderfoot Hill Street		Colorado Springs	CO	26801	USA

[Print Envelope](#)

SAVE PROSPECT



## CONTRACTS

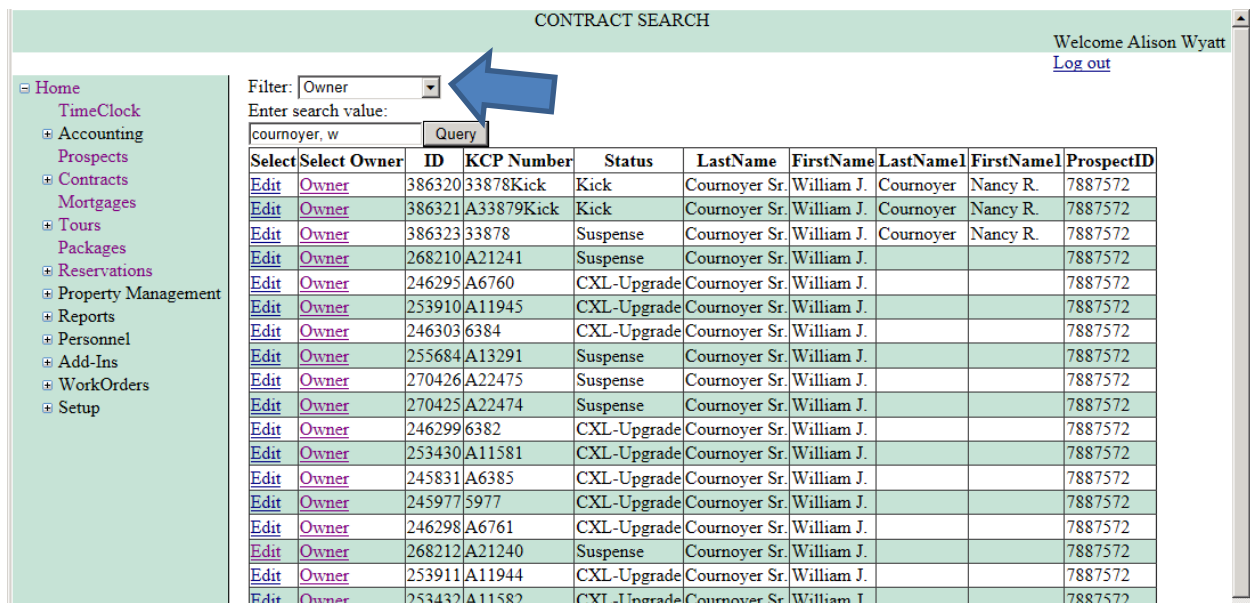
### FINDING YOUR CONTRACT

CONTRACT records are a list of all owners, past and present at King's Creek Plantation. This also includes Northstar owners and Experience the Dream owners.

The CONTRACT TAB is located in the menu on the left side of the window in CRMS. The menu is accessible from any section in CRMS.

The CONTRACT TAB allows you to search for owners using multiple types of information. You may search by the following: Contract Number, Contract ID, Owner Name, Co-Owner Name, Trust Name and Company Name. The better you define your search, the more accurate your results will be. For example, if you do a search by Owner Name and use only the last name, the list returned to you will include all owners with that last name. Contract Number will give you the most accurate results. To begin your search, you would choose your filter from the drop down menu, enter the information related to the filter and click on the Query button. Any results that match your request will be listed below the search box.

The contract record will give you a complete overview of the owner's history with KCP. Here you will find out when they purchased, what they purchased, what they have done with their time, the status of their contract, co-owners and correspondence with the owner.



CONTRACT SEARCH

Welcome Alison Wyatt  
[Log out](#)

Filter:

Enter search value:  
cournoyer, w

Select	Select Owner	ID	KCP Number	Status	LastName	FirstName	LastName	FirstName	ProspectID
<a href="#">Edit</a>	<a href="#">Owner</a>	386320	33878Kick	Kick	Cournoyer Sr.	William J.	Cournoyer	Nancy R.	7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	386321	A33879Kick	Kick	Cournoyer Sr.	William J.	Cournoyer	Nancy R.	7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	386323	33878	Suspense	Cournoyer Sr.	William J.	Cournoyer	Nancy R.	7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	268210	A21241	Suspense	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	246295	A6760	CXL-Upgrade	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	253910	A11945	CXL-Upgrade	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	246303	6384	CXL-Upgrade	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	255684	A13291	Suspense	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	270426	A22475	Suspense	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	270425	A22474	Suspense	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	246299	6382	CXL-Upgrade	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	253430	A11581	CXL-Upgrade	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	245831	A6385	CXL-Upgrade	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	245977	5977	CXL-Upgrade	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	246298	A6761	CXL-Upgrade	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	268212	A21240	Suspense	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	253911	A11944	CXL-Upgrade	Cournoyer Sr.	William J.			7887572
<a href="#">Edit</a>	<a href="#">Owner</a>	253432	A11582	CXL-Upgrade	Cournoyer Sr.	William J.			7887572

In the example above, we performed a search by name. The system returned with all matches fitting those parameters.

From this screen you have two options to access the owner's account. By clicking on the [Edit](#) button you will be brought to the owner's contract record. If you click on the [Owner](#) button you will be brought back to their prospect record.

## 1. CONTRACT TAB

**EDITING A CONTRACT**

Cournova Sr., William

CONTRACT	CO-OWNER	INVENTORY	MORTGAGE	USAGE	UPLOADED DOCS
EVENTS	NOTES	PERSONNEL	USER FIELDS	USAGE RESTRICT	AUTH USERS
CONVERSIONS					

Contract ID: 268212 Contract Date: 4/19/2007

Contract #: A21240 Occupancy Year: 2008

Trust: ☐ Trust Name:

Company: ☐ Company Name:

Contract Type: Full Down Sub-Type: Legacy

Anniversary Date:

Sale Type: Estate Sub-Type: 4 - Estates

Week Type: Float Season: Red

Billing Code: In House Upgrade Frequency: Annual

Status: Active Status Date: 4/19/2007

Sub Status: (empty) Maintenance Fee Status: AFC

Maintenance Fee: 1060.0000 Split MF: ☐

Property Tax: 0.0000 Maintenance Fee Code: KCP09

Tour ID: 603869 Campaign: OWN

Save Re-Print

The information that you will find in the Contract account can be located in several different sections of the record. Please note that you would NEVER CHANGE any information listed on the Contract.

When reading the information on the CONTRACT TAB starting at the top, the information that is relevant to you is as follows:

1. Contract Date: Date contract was first purchased
2. Occupancy Year: First year owner has access to their time. This will also help determine whether a Biennial owner is and Odd or Even year owner.
3. Trust Name: If contract is written in the name of a Trust.
4. Company Name: If contract is written in the name of a Company.
5. Sub-Type: Legacy or Points
6. Anniversary Date: Date owner became a member of the Club Explore program for this contract.
7. Sale Type: Indicates unit type – Cottage, Townes or Estates. (verified by looking at INVENTORY tab)
8. Sub-Type: Indicates unit size – 1 bedroom, etc. (verified by looking at INVENTORY tab)
9. Week Type: Fixed vs. Float
10. Season: Red vs. Yellow
11. Frequency: Indicates how often they are entitled to their time. Annual, Biennial or Triennial.
12. Status: Indicates contract status. Contract Status should always be verified prior to completing a task for the owner.
13. Sub Status: indicates specifics on the contract status. Ie. Active – Redeem.
14. Maintenance Fee Status: indicates whether maintenance fee account is with AFC or being handled in-house by Finance Department.

## 2. INVENTORY TAB

EDITING A CONTRACT

Welcome Alison Wyatt  
[Log out](#)

[Home](#)  
[TimeClock](#)  
[Accounting](#)  
[Prospects](#)  
[Contracts](#)  
[Mortgages](#)  
[Tours](#)  
[Packages](#)  
[Reservations](#)  
[Property Management](#)  
[Reports](#)  
[Personnel](#)

[Cournoyer Sr., William J.](#)

CONTRACT CO-OWNER **INVENTORY** MORTGAGE USAGE UPLOADED DOCS

EVENTS NOTES PERSONNEL USER FIELDS USAGE RESTRICT AUTH USERS CONVERSIONS

Select	ID	Name	Week	Occupancy Year	Frequency	Active
<a href="#">Edit</a>	15008	100A Dakota Drive	23	2008	Annual	<input type="checkbox"/>
<a href="#">Edit</a>	15011	100B Dakota Drive	23	2008	Annual	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	15013	100C Dakota Drive	23	2008	Annual	<input checked="" type="checkbox"/>

The INVENTORY tab will display all pieces of inventory that have ever been tied to contract. The only pieces of inventory that you should be concerned with are those that are marked ACTIVE. One contract can have multiple pieces of ACTIVE inventory tied to it.

Name: Street name and number will indicate type of unit, ie. 101 Shipyard Drive indicates a 3 bedroom Cottage.

Cottage: will never have a letter after the Unit number

Townes: street will be named after a flower

Estates: street will not be named after a flower and will have a letter after the unit number

Week: Indicates week listed on deed. This will help determine season of ownership. For example, week 2 is a Yellow season week.

Occupancy Year: First Year of occupancy will help determine if EVEN or ODD year owner is a Biennial owner.

Frequency: Indicates how often they are entitled to their usage, every year, every other year, etc.

Active: Only those weeks that are check marked are relevant to contract.

### 3. USAGE TAB

EDITING A CONTRACT									
Welcome Alison Wyatt <a href="#">Log out</a>									
<div> <div> <a href="#">Home</a> <a href="#">TimeClock</a> <a href="#">Accounting</a> <a href="#">Prospects</a> <a href="#">Contracts</a> <a href="#">Mortgages</a> <a href="#">Tours</a> <a href="#">Packages</a> <a href="#">Reservations</a> <a href="#">Property Management</a> <a href="#">Reports</a> <a href="#">Personnel</a> <a href="#">Add-Ins</a> <a href="#">WorkOrders</a> <a href="#">Setup</a> </div> <div> <a href="#">Cournoyer Sr., William J.</a> </div> </div>									
<div> <div>CONTRACT</div> <div>CO-OWNER</div> <div>INVENTORY</div> <div>MORTGAGE</div> <div>USAGE</div> <div>UPLOADED DOCS</div> </div>									
<div> <div>EVENTS</div> <div>NOTES</div> <div>PERSONNEL</div> <div>USER FIELDS</div> <div>USAGE RESTRICT</div> <div>AUTH USERS</div> <div>CONVERSIONS</div> </div>									
	UsageID	Type	SubType	RoomType	UsageYear	Days	InDate	OutDate	Status
<a href="#">Select</a>	318470	Owner	Owner	2BD	2013	7	8/2/2013	8/9/2013	Used
<a href="#">Select</a>	308998	Owner	Owner	1BD-DWN	2013	7	5/31/2013	6/7/2013	Used
<a href="#">Select</a>	308997	Owner	Owner	1BD-DWN	2013	7	5/24/2013	5/31/2013	Used
<a href="#">Select</a>	189080	Owner	Owner	1BD-DWN	2012	7	5/18/2012	5/25/2012	Used
<a href="#">Select</a>	189079	Owner	Owner	1BD-DWN	2012	7	5/11/2012	5/18/2012	Used
<a href="#">Select</a>	189076	Owner	Owner	2BD	2012	7	11/23/2012	11/30/2012	Used
<a href="#">Select</a>	166983	Owner	Owner	1BD-DWN	2011	7	5/27/2011	6/3/2011	Used
<a href="#">Select</a>	166981	Owner	Owner	1BD-DWN	2011	7	11/25/2011	12/2/2011	Used
<a href="#">Select</a>	152734	Owner	Owner	2BD	2011	7	7/8/2011	7/15/2011	Used
<a href="#">Select</a>	134572	Owner	Owner	1BD-DWN	2010	7	8/27/2010	9/3/2010	Used
<a href="#">Select</a>	118640	Owner	Owner	1BD-DWN	2010	7	7/30/2010	8/6/2010	Used
<a href="#">Add Usage</a>									

#### A. UNDERSTANDING THE USAGE TAB

The USAGE tab will display everything your owner has done with his ownership weeks. Usages are a simple means to track what an owner has done. Please note that due to the conversion to CRMS in 2007, usages from that year and prior will not necessarily be displayed. If they are not included, you will have to read thru the PROSPECT notes for information. Usages are displayed from newest Usage ID to oldest (ID created when usage is created), which means that sometimes the usages from the current year may not be listed at the top.

When looking at the USAGE tab, the information is as follows:

Type: This indicates how the owner used their time – Exchange, Rental, etc

Sub-Type: This is used for 3 different types of usages, Exchange, Points and Owner. For Exchange usages, it would indicate which exchange company they gave their time to. For Points and Owner usages, it would indicate if owner used the week themselves or gave it to someone else.

Room Type: This indicates the unit size assigned to the usage.

Usage Year: This indicates the usage year from which owner is using their time.

Days: Length of usage. Owner, Trial Owner, Rental and Exchange usages should always be listed as 7.

In Date/ Out Date: Check in and out dates of usage.

Status: This is either Used or Not Used. Not Used is for cancelled usages that are not rebooked same day or errors. This should be used as little as possible.

Scroll bar on end will be displayed if there are more usages than can fit in the screen block.

## B. CREATING A USAGE

Usages must be created prior to creating a reservation. Usages will be linked to an owner's contract for booking, banking or renting. If there is already a future dated usage with a status of Not Used, reuse that usage otherwise,

1. A. While in USAGE tab, click on the "Add Usage" button in bottom left of screen.  
A pop up box will appear. You must fill out all relevant information on the Usage Details tab before proceeding.
  - a. The Owner Name and Contract Number will fill in automatically as you are creating the Usage within the contract.
  - b. The Usage Year is set to default to the current year, so make sure if booking a usage using a future year's time that you update the Usage Year accordingly.
  - c. You should only be using Owner or Trial Owner for the type.
  - d. The Sub-Type should then only be Owner or Non Owner.
  - e. Status should always be set to Used when creating a usage.
  - f. The Unit Type that you pick will help determine what inventory is displayed when completing usage. Your choices are based on inventory type – Cottage, Townes or Estates.
  - g. The Room Type is used for the unit size.
  - h. Days should always be 7
  - i. In Date would be check in date of usage. The Out Date autofills based on the number of days.
  - j. Click on the "Save" button.

Remember that your reservation type should always match your usage type so make sure you know what the owner wants to do with their week prior to creating the usage so that you will not have to go back and make modifications.

2. Once you have created your Usage, you must add rooms. This is done in the ROOMS tab by clicking on the Add Room button. A pop-up box will appear displaying ALL units that meet your criteria (Unit Type, Room Size and check in/out dates). The system does NOT look at the unit check in day, so you must always remember to choose a unit that matches the check in day of the usage.

Usage - Windows Internet Explorer

USAGE DETAILS ROOMS NOTES EVENTS RESERVATIONS

No Records

Add Room

Select a Room to Add:

	Room(s)	Room Type(s)	RoomSubType(s)	UnitStyle
Select	10-204A	2BD	FRI	Handicap
Select	10-206A	2BD	FRI	Handicap

- Should you need to modify an existing usage, please note that you cannot do so once the check in date is in the past. If this is the case and you must create a new usage, make sure that you change the Usage Status to Not Used on the existing usage. If you need to change the check in dates or usage type, you will need to remove the room prior to making the change. Once the change is made, click on the Save button on the bottom left of the usage and then add the room back in.

### C. CANCELLING A USAGE

To cancel a usage you must first remove the room from the usage. Go to the ROOMS tab and remove all the rooms by clicking on the [Remove](#) link to the right of the room.

RoomID	Room	Style
226	10-203A	<a href="#">Remove</a>

[Add Room](#)

Next you must go back to the USAGE DETAILS tab and change the status to Not Used and click on the Close and Save button.

Owner:  Date Created:

Contract:  Usage Year:

Type:  Sub-Type:

Category:  Amount Promised:

Inventory:  Status:

UnitType:  RoomType:

Days:  Points:

In-Date:  Out-Date:

[Save](#) [Save & Close](#) [Print Confirmation Letter](#)

### 4. USAGE RESTRICTOR TAB

The USAGE RESTRICTOR tab is used by the Finance Department and Club Explore to place restrictors on a contract based on a past due amount of some type. When there is a restrictor listed, it should prevent you from creating or modifying a Usage. Owners must be current on all their financial obligations on ALL their contracts (this included Maintenance Fees, Club Fees, Mortgage payments, etc) to have access to

their weeks or owner benefits. Before processing an owner's request, you will want to check for restrictors.

**Editing a Contract - Windows Internet Explorer**

Find: 844477 Previous Next Options

**EDITING A CONTRACT**

[Home](#)

- TimeClock
- Accounting
- Prospects
- Contracts
- Mortgages
- Tours
- Packages
- Reservations
- Property Management

[Waters, Joshua](#)

CONTRACT	CO-OWNER	INVENTORY	MORTGAGE	USAGE	UPLOADED DOCS
EVENTS	NOTES	PERSONNEL	USER FIELDS	USAGE RESTRICT	AUTH USERS
CONVERSIONS					

**UPLOADED DOCS**

ID	Name	Date Uploaded	Move	Rename	View	Remove/Delete
422793	27384=WATERS.pdf	7/16/2009 1:15:44 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
346095	27384=Recorded Deed and DOT.pdf	9/9/2009 11:33:48 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
439849	27384=2010 Maintenance Fee Invoice.doc	1/5/2010 10:31:27 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
448190	27384=Owner Mail.pdf	4/27/2010 9:54:50 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
317731	27384=2010 RA.pdf	11/23/2010 3:33:24 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
317949	27384=Reservation Risk letter.pdf	11/24/2010 10:12:46 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
363059	27384=2011 Maintenance Fee Invoice.doc	12/9/2010 2:40:14 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
374629	27384=paid in full.pdf	3/3/2011 3:26:19 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
385919	27384 =2010 Rental Check.pdf	4/7/2011 7:37:28 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
398126	27384=WATER.pdf	10/18/2011 2:58:14 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
410365	27384=2012 Maintenance Fee Invoice.doc	1/6/2012 9:51:49 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
458300	27384=2012 Late Fee Invoice.doc	2/16/2012 4:18:50 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
470737	27384=Suspension Policy Letter - 1st notice.doc	4/17/2012 10:30:49 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
544953	27384=2013 Maintenance Fee Invoice-Annual.doc	1/31/2013 12:59:47 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
551157	27384=2012 Late Fee Invoice1.doc	2/14/2013 6:01:36 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
556555	27384=Collection Letter.doc	3/8/2013 9:48:10 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
560582	27384=Certified Suspension Notice.doc	3/19/2013 5:21:05 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
565468	27384=Final Collection Letter.doc	4/3/2013 4:03:39 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
569972	27384=Pay Plan.pdf	4/26/2013 9:49:22 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
575338	27384 = email from owner re 2013 exchange.txt	5/31/2013 3:58:01 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>

[Add Restrictor](#)

[Browse...](#) [Upload](#)

http://cms.kingscreekplantation.com/cmsnet/marketing/editcontract.aspx?contra...

## 5. UPLOADED DOCS TAB

The UPLOADED DOCS tab will contain any scanned, uploaded documents that relate to the Contract record. This will include Maintenance Fee invoices, Contract documents, correspondence to and from owner, etc. Anytime you send an email to an owner or receive one, you must upload to the UPLOADED DOCS tab in the contract.

**UPLOADED DOCS**

ID	Name	Date Uploaded	Move	Rename	View	Remove/Delete
422793	27384=WATERS.pdf	7/16/2009 1:15:44 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
346095	27384=Recorded Deed and DOT.pdf	9/9/2009 11:33:48 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
439849	27384=2010 Maintenance Fee Invoice.doc	1/5/2010 10:31:27 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
448190	27384=Owner Mail.pdf	4/27/2010 9:54:50 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
317731	27384=2010 RA.pdf	11/23/2010 3:33:24 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
317949	27384=Reservation Risk letter.pdf	11/24/2010 10:12:46 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
363059	27384=2011 Maintenance Fee Invoice.doc	12/9/2010 2:40:14 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
374629	27384=paid in full.pdf	3/3/2011 3:26:19 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
385919	27384 =2010 Rental Check.pdf	4/7/2011 7:37:28 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
398126	27384=WATER.pdf	10/18/2011 2:58:14 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
410365	27384=2012 Maintenance Fee Invoice.doc	1/6/2012 9:51:49 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
458300	27384=2012 Late Fee Invoice.doc	2/16/2012 4:18:50 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
470737	27384=Suspension Policy Letter - 1st notice.doc	4/17/2012 10:30:49 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
544953	27384=2013 Maintenance Fee Invoice-Annual.doc	1/31/2013 12:59:47 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
551157	27384=2012 Late Fee Invoice1.doc	2/14/2013 6:01:36 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
556555	27384=Collection Letter.doc	3/8/2013 9:48:10 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
560582	27384=Certified Suspension Notice.doc	3/19/2013 5:21:05 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
565468	27384=Final Collection Letter.doc	4/3/2013 4:03:39 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
569972	27384=Pay Plan.pdf	4/26/2013 9:49:22 AM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>
575338	27384 = email from owner re 2013 exchange.txt	5/31/2013 3:58:01 PM	<a href="#">Move</a>	<a href="#">Rename</a>	<a href="#">View</a>	<a href="#">Remove/Delete</a>


[Browse...](#) [Upload](#)

http://cms.kingscreekplantation.com/cmsnet/marketing/editcontract.aspx?contra...

- To add a new document to the UPLOADED DOCS you must follow the steps listed below:
  - Scan document or open email to be uploaded
  - Go to File, Save As
  - Go to Computer, G:Drive/Daily Upload/Contract Files



- d. Save the file using the correct format. File name must be Contract# followed by “=” then description of document. Only the contract# can be in front of the “=” for the system to be able to upload the documents. ie. 19707 = email from owner re 2013 rental.
  - e. Make sure your Save As type is Word, Excel, Text for PDF.
  - f. Once you have save the document, verify that the document has uploaded to the Contracts UPLOADED DOCS tab. If it has not, do not keep trying, first verify that you did not misname it of save it to the incorrect folder.
    - i. If misnamed, rename and it should upload
    - ii. If saved to the wrong folder, cut and paste it to the correct folder. If system has already tried to upload it, you will have to rename it by deleting the “Invalid#” before the “=”.
- B. To rename an existing file, you must click on the [Rename](#) link located to the right of the document you wish to rename. A pop up box will be displayed with the current file name. Type in the new name next to “New File Name” and click on update. Make sure to always name any document listed under the contract UPLOADED DOCS tab with the contract number and “=”.



A screenshot of a web browser window with the address bar showing <http://crms.kingscreekplantation.com/crmsnet...>. The main content area displays a file rename dialog box. It has two text input fields: "Original File Name:" containing "27384=2010 RA.pdf" and "New File Name:" containing "7384= 2010 Reservation". Below these fields is a button labeled "Update".

- C. To move an existing file from one contract to another, you must click on the [Move](#) link located to the right of the document you wish to move. A pop up box will be displayed and you must enter the contract number to which you are moving the document. Remember to only enter the actual contract number, no need to enter KCP first.



A screenshot of a web browser window with the address bar showing <http://crms.kingscreekplantation.com/crmsnet...>. The main content area displays a file move dialog box. It has a text input field labeled "Move to Contract Number:" containing the value "12463". Below this field is a button labeled "Move File".



## 6. CO-OWNER TAB

The CO-OWNER tab is used to list the names of all co-owners on the deed. If there is only one person listed on the deed, the CO-OWNER tab will be empty. If there are multiple co-owners, then all should be listed here.

**EDITING A CONTRACT**

Welcome Alison Wyatt [Log out](#)

[Dike, Chukwuemeka](#)

CONTRACT		CO-OWNER	INVENTORY	MORTGAGE	USAGE	UPLOADED DOCS	
EVENTS		NOTES	PERSONNEL	USER FIELDS	USAGE RESTRICT	AUTH USERS	CONVERSIONS
Select	ID	ProspectID	FirstName	LastName			
<a href="#">Edit</a>	<a href="#">Remove</a>	15106	8444773	Margaret	Dike		
<b>ADD NEW</b>		<b>REFRESH</b>					

If a co-owner needs to be added to a contract (this should only be done once all names on deed are verified) there are two methods to add a co-owner.

A. The first method is when the spouse of the primary prospect is the co-owner. Spouse must be listed under the Prospect Demographics tab to continue with this method. When verifying the Spouse information under Demographics, please make sure that the first name and last name are listed in the correct areas. If they are not, take a moment to correct and update. Copy one of the pieces of information from the Prospect to use when adding the Co-Owner. I find that using one of the active phone numbers works well.

**EDITING A PROSPECT**

Welcome Alison Wyatt [Log out](#)

Cournoyer Sr., William J.

PROSPECT	DEMOGRAPHICS	TOURS	TOUR PACKAGES	USER FIELDS	FINANCIALS	
CONTRACTS	RESERVATIONS	EVENTS	NOTES	PERSONNEL	REFERRALS	UPLOADED FILES

Birth Date:

Marital Status:

Spouse First Name:

Spouse Last Name:

Spouse SSN:

Occupation:

Income:

Income/Debt:

Credit Score:

Spouse Credit Score:

Phone Numbers: [Add Phone Number](#)

Select	ID	Number	Extension	Type	Active
<a href="#">Edit</a>	14228090	7576377867	0	MOBILE	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	4082387		0		<input type="checkbox"/>
<a href="#">Edit</a>	14228701		0		<input type="checkbox"/>
<a href="#">Edit</a>	16724070		0		<input type="checkbox"/>
<a href="#">Edit</a>	16726019		0		<input type="checkbox"/>

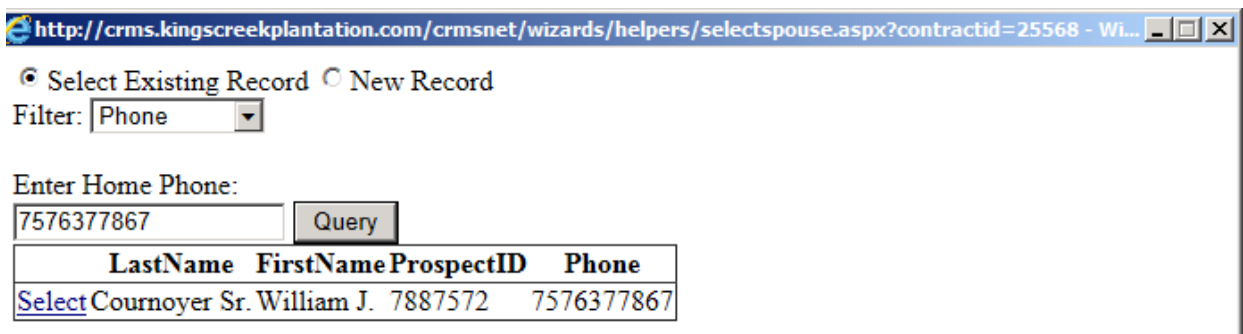
Addresses: [Add Address](#)

Select	ID	Address1	Address2	City	State	Zip	Country
<a href="#">Edit</a>	16115149	500 Regina Court		Hampton	VA	23669-1332	USA

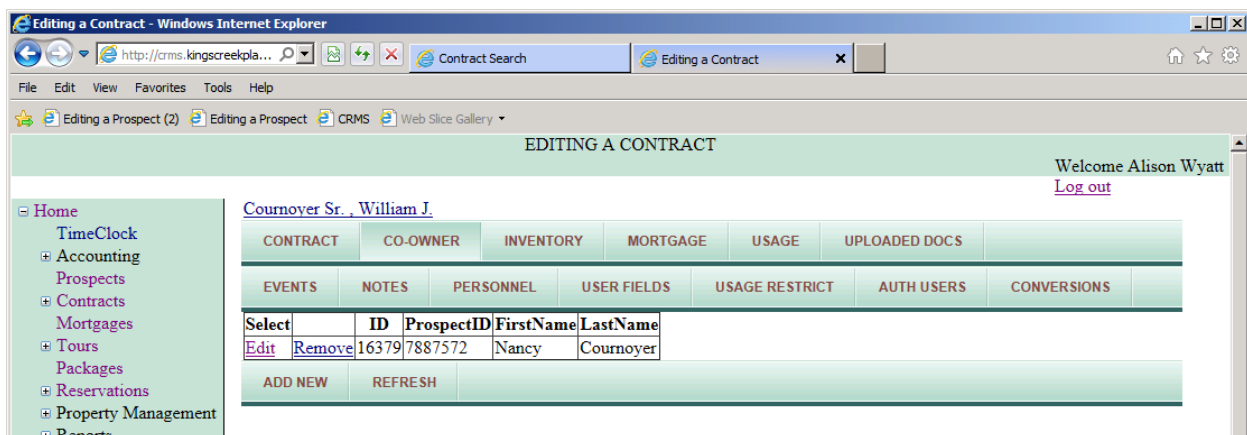
The next step is to return to the CO-OWNER tab under the contract and click on the **ADD NEW** button on the bottom left of the screen. A pop-up box will then appear.



Click on the radial button next to Select Existing Record and choose your filter. Since we copied the phone number, we will leave the Filter at the default of Phone. Paste the phone number in the box and click on the Query button. All prospects with that phone number listed in it will be displayed. If you verified with your owner that the phone number you are using does in fact belong to them, please inactivate the phone number from those prospects that are incorrect. Next you will click on the [Select](#) link to the left of the correct prospect.

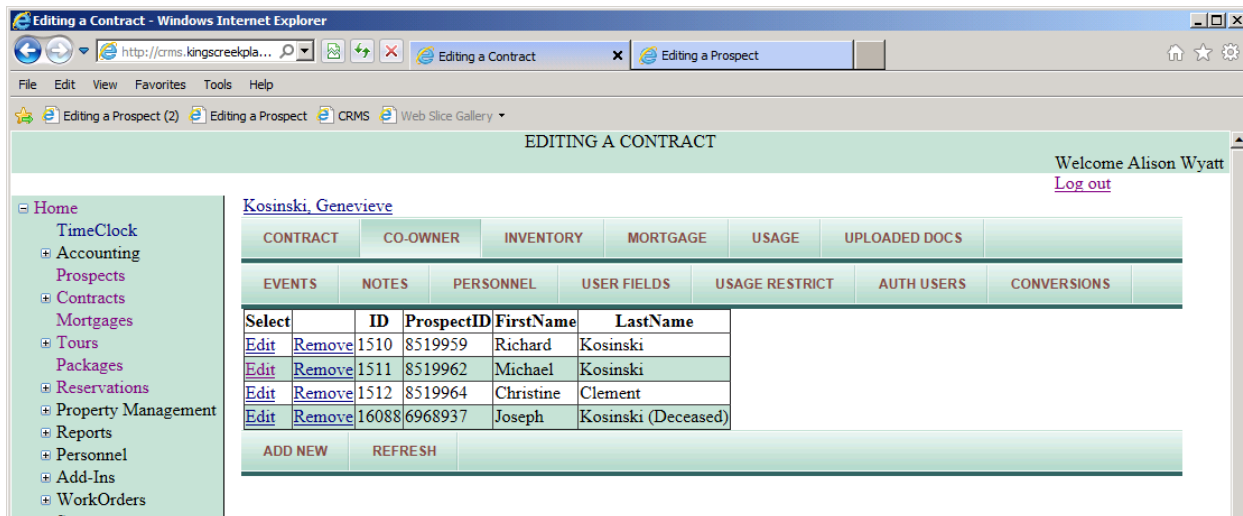


By doing this, the individual whose name is listed under the spouse information in the Demographics tab will be added as a Co-Owner. You must click on the **REFRESH** button to update the display on your screen. Once this is done, your Co-Owner will be listed for all to view and access.



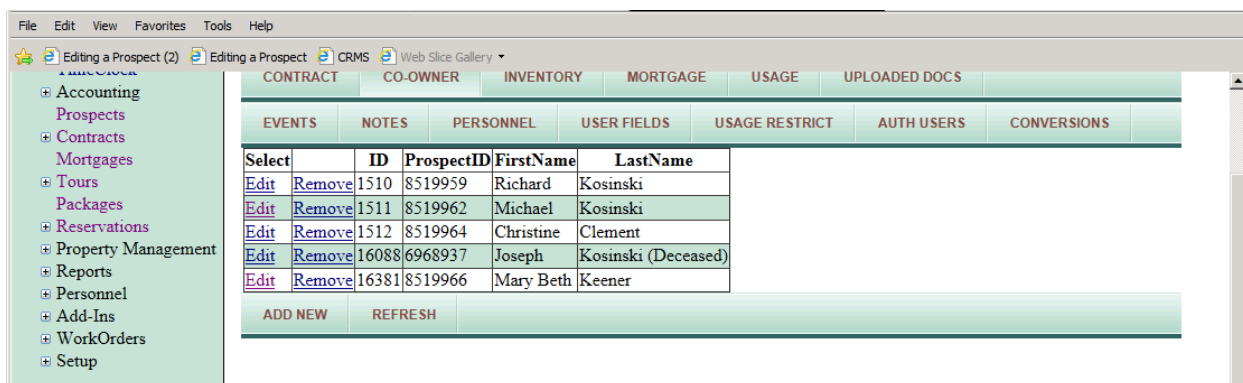
B. The second method is if the Co-Owner is not the spouse on record. You will find that some contracts have multiple owners and if they are not the spouse, you need to create a new record with all their pertinent information including address, phone number and email if available. If the Co-Owner's

demographic information is different than the primary owner's, it is important to include it when creating the record so that the Co-Owner is sent all correspondence also.



To begin, you must click on the **ADD NEW** button on the bottom left of the screen. A pop-up box will then appear.

Next, click on the radial button next to New Record. The pop-up will now display the different prospect fields that you can fill out for the Co-Owner. Once all the information is added, click on the Add button on the bottom left. You must click on the **REFRESH** button to update the display on your screen. Once this is done, your Co-Owner will be listed for all to view and access.

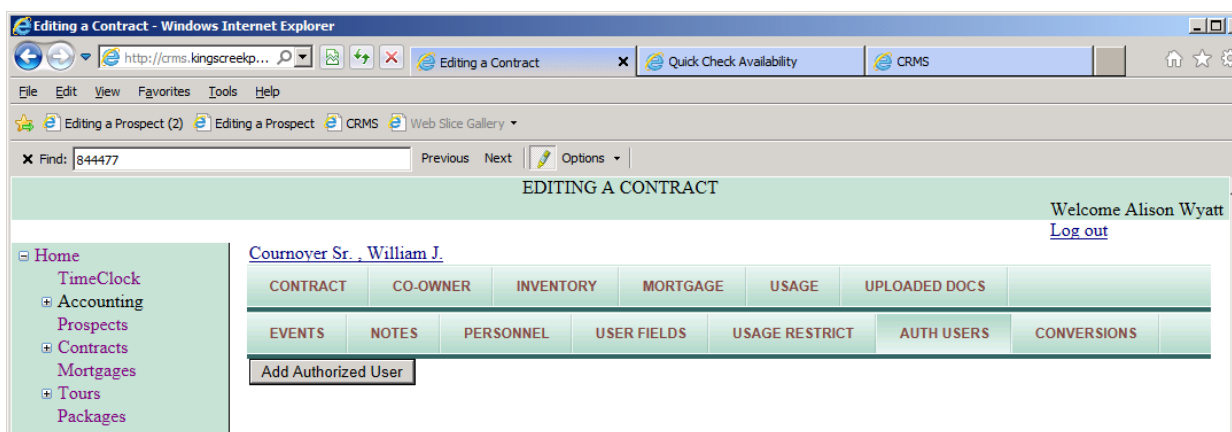


Remember when speaking with a Co-Owner with different contact information than primary owner, to verify their contact information in their prospect and update as needed. You would access their prospect record by clicking on the [Edit](#) link to the left of the individual's name.

## 7. AUTH USERS TAB

The AUTH USERS tab is used to list any authorized user on the contract that is not listed on the deed. Only one of the owners listed on the deed can request that an individual be added to the AUTH USERS tab. Anyone listed here can use the contract as their own – booking or banking time or paying fees. An authorized user cannot place a contract in the rental program.

To add an individual to the AUTH USERS tab, click on the “Add Authorized User” button. A pop up box will be displayed and you will have to fill in their First and Last names. Owners may add as many authorized users to the account as they want.



If owner wishes to have an authorized user removed from the account, you would simply click on the [Remove](#) link to the right of the name of the person being removed from the account.



## 8. NOTES TAB

The NOTES TAB will display all notes tied to the individual's contract from newest to oldest. The date the note was created and who created the note will be listed on the right side of the screen. While the [Edit](#) link is displayed next to each individual note, you may only edit a record if you created the original note within the last 24 hours. After that time period, notes can no longer be modified. This is also where you would add any notes pertaining specifically to the contract. This is accomplished by clicking on the “**ADD NEW**” tab on the bottom, left of the screen.

When adding a note to the Contracts NOTES tab, you will see it varies somewhat from any other location. Any note you add to a contract should also be added to the prospect record.

## 9. CONVERSIONS TAB

The CONVERSIONS TAB will only contain information if the owner has converted the existing contract from Legacy to Points.

The conversion number will have Outfield1, PMI or be blank. The first two indicate which outside vendor met with the owner and converted them to Points. If the field is blank, it means the conversion was done in-house either by sales at time of upgrade or additional new contract purchase or by a representative in Owner Services or System Operations. To view more information on the conversion, click on the [Select](#) link on the left.

Once in the conversion tab there are 3 pieces of information that you might use. Conversion Status will indicate if the conversion is Active, Cancelled or a Pender. If cancelled or pender, they are currently Points owners. Status Date is when the conversion was processed in CRMS. Finally, the Club First Occupancy will indicate the first year that the owner will have access to points with Club Explore. As this is a recent addition, all conversion prior to June 2013 will not have any information listed for Club First Occupancy.

CRMS - Windows Internet Explorer

http://crms.kingscreekpla... Editing A Reservation CRMS

File Edit View Favorites Tools Help

Editing a Prospect (2) Editing a Prospect CRMS Web Slice Gallery

Welcome Alison Wyatt Log out

Home TimeClock Accounting Prospects Contracts Mortgages Tours Packages Reservations Property Management Reports Personnel Add-Ins

Welsh, Ronda

CONVERSION PURCHASE FINANCING AMORTIZATION

EVENTS NOTES PAYMENTS USER FIELDS

ConversionID: 3508 Number: outfield1

Status: Active Status Date: 6/11/2013

Type: (empty) Club First Occupancy: 2015

Save

The PURCHASE tab within the conversion will display the invoices and payments for the conversion. By clicking on the arrow next to the invoice, the system will display any payments made against invoice. Information to be viewed will be payment method (check, cash, credit card, etc), day payment was processed and amount of payment.

CRMS - Windows Internet Explorer

http://crms.kingscreekpla... CRMS

File Edit View Favorites Tools Help

Editing a Prospect (2) Editing a Prospect CRMS Web Slice Gallery

Welcome Alison Wyatt Log out

Home TimeClock Accounting Prospects Contracts Mortgages Tours Packages Reservations Property Management Reports Personnel Add-Ins WorkOrders Setup

Welsh, Ronda

CONVERSION PURCHASE FINANCING AMORTIZATION

EVENTS NOTES PAYMENTS USER FIELDS

Sales Volume: \$2,995.00

Commission Volume: \$2,995.00

Sales Price: \$2,995.00 ☐ Finance Closing Costs

Original Purchase Price: \$0.00

Invoice	TransDate	Due Date	Orig. Amount	Adj. Amount	Balance
Down Payment Conv	Jun-11-2013	Jul-11-2013	\$320.00	\$320.00	\$0.00 <a href="#">Edit</a>

Payments

PaymentID	Method	TransDate	Amount	Applied
377584	VISA	Jun-11-2013	(\$320.00)	(\$320.00) <a href="#">Edit</a> <a href="#">Receipt</a>

Adjustments

# INVENTORY

## QUICK CHECK AVAILABILITY

The QUICK CHECK AVAILABILITY feature is located under Property Management in the main menu on the left of the screen. The QUICK CHECK is used to search for availability for stays at the resort. The more information you specify in your search, the more exact will be your results. If you are looking for a specific check in date you would want to fill out all of the information required and you would only receive a response if your exact criteria was met.

Room 1	2	3	Check-In Day	Style
10-101A			THU	
10-101B			THU	
13-112A			THU	
13-112B			THU	
13-114A			THU	
13-114B			THU	
13-116A			THU	

1. From the HOME page, you must click on the PROPERTY MANAGEMENT tab. This will bring you to next screen.
2. You must now click on the QUICK CHECK AVAILABILITY tab to get to the page that lets you enter your search parameters.
3. You must first put in your search parameters. START DATE is the first check in date you are looking for. END DATE is the last check in date you are requesting. This is useful if your owner requests you look for a time span of greater than one week.
4. You must now click on the FOR USAGE radial button. Remember, you cannot book a reservation without creating usage first and you cannot create usage if there is no availability in the usage type you need.
5. Next will be the number of consecutive nights you are looking to book. For owner services, you should ALWAYS be filling out 7 under NIGHTS.
6. USAGE TYPE would be the type of reservation you are booking ie. Owner usage, Exchange usage, etc.
7. UNIT TYPE indicates your style of unit, Townes, Cottage, Estates and ROOM TYPE would be the size of the unit you need.

8. Finally, ROOM SUB TYPE lets you choose if you need a THURSDAY, FRIDAY, SATURDAY or SUNDAY check in unit. Should you choose ALL, the system will list all available check in dates.

9. When you click on the CHECK AVAIL button a list of all rooms fitting your parameters will appear.

**OWNER SERVICES, PLEASE NOTE THAT THE SYSTEM IS CHECKING FOR ROOMS THAT FALL IN YOUR REQUEST RANGE.** If you request all units for 7 nights available in October, that is what the system will list. It will not take into account that **YOU** can only book a FRIDAY check in for a FRIDAY unit. **YOU** must verify that the unit you are choosing meets your restrictions.

10. A list of boxes will appear, each with an individual heading such as OWNER – COTTAGE – 1BD's AVAILABLE from 11/01/2013 – 11/8/2013. The first line indicates that this is OWNER usage, in a COTTAGE unit, 1 bedroom available to check in 11/01/2013 for 7 NIGHTS. As per your request, the system now lists ALL units that fall into those specifications, but if you look, 11/01/13 is a FRIDAY so you must only look for units listed as FRI check ins. Now you can let your owner know that there is availability in the date range they are looking to stay and go to their contract to build their usage if they accept the dates. Should they request another date within your range, you would only need to scroll down the page for more options.

QUICK CHECK AVAILABILITY

Welcome Alison Wyatt  
[Log out](#)

Home  
TimeClock  
Accounting  
Prospects  
Contracts  
Mortgages  
Tours  
Packages  
Reservations  
Property Management  
Reports  
Personnel  
Add-Ins  
WorkOrders  
Setup

Start Date: 11/1/2013  
End Date: 11/1/2013  
☐ For Reservation ☒ For Usage  
Nights: 7  
Usage Type: Owner  
Unit Type: Cottage  
Room Type: 1 BD  
Room SubType: ALL  
Button

Owner - Cottage - 1BD's Available from 11/1/2013 to 11/8/2013

Room	1	2	3	Check-In Day	Style
1-104B				SAT	Handicap
9-205B				THU	Handicap

## **INVENTORY CODING**

When searching for available inventory for your owners, you must be able to understand the information generated by CRMS so that you can best serve your owner.

Cottage units are available in Chesapeake (D style), James (C style) or York (B style) type units. Each unit's layout is different. When you use Quick Check or add a room to a reservation, the system will list which style unit you are choosing. The only Cottage units that do not show type are the Handicap accessible units. Under "Style" it will be listed as Handicap. Please remember that in the Cottages, only the 1 bedroom side of the unit is actually Handicap accessible. The 2 bedroom is marked as such but is



set up as a regular unit with 2 stories. The Cottage Handicap units are available for Thursday check in (9-205B) or Saturday check in (1-104B).

When looking at Cottage inventory, units are defined with an “A” for the 2 bedroom side, “B” for the 1 bedroom side or “AB” for the entire unit.

Cottage units are all on streets 1 – 9 so when looking at the inventory, even if the unit type isn’t listed, you should be able to recognize the Cottages in this manner. Example : 1-104B would be a 1 bedroom Cottage.

Townes units are available as upstairs or downstairs units. All 2 bedroom Townes units have the same layout. A 4 bedroom Townes unit is made up of 2 – 2 bedroom Townes units on the same floor. The only Townes units that will have any information listed under “Style” will be the Handicap accessible units. There a 4 – 2 bedroom Handicap accessible Townes units, all 4 are Friday check ins (10-200A, 10-202A, 10-204A, 10-206A)

When looking at Townes inventory, units are defined with an “A” for downstairs units and “B” for upstairs units. A 4 bedroom Townes unit will always be made up of 2 “A” units or 2 “B” units.

Townes units are all on streets 10 - 13 so when looking at the inventory, even if the unit type isn’t listed, you should be able to recognize the Townes in this manner. Example : 10-203A would be a 2 bedroom downstairs Townes unit.


Estates units are available in 1 bedroom, 2 bedroom, 3 bedroom or 4 bedroom units. A 3 bedroom unit is made up of a 2 bedroom unit and a downstairs 1 bedroom unit. A 4 bedroom unit is made up of a 2 bedroom unit, a 1 bedroom downstairs unit and a 1 bedroom upstairs unit. The only Estates units that will have any information listed under “Style” will be the Handicap accessible units. Please remember that in the Estates, only the 1 bedroom downstairs unit is actually Handicap accessible. The 2 bedroom and 1 bedroom upstairs are marked as such but are set up as regular units. The Estates Handicap units are available for Friday check in (15-100B) or Sunday check in (17-104B).

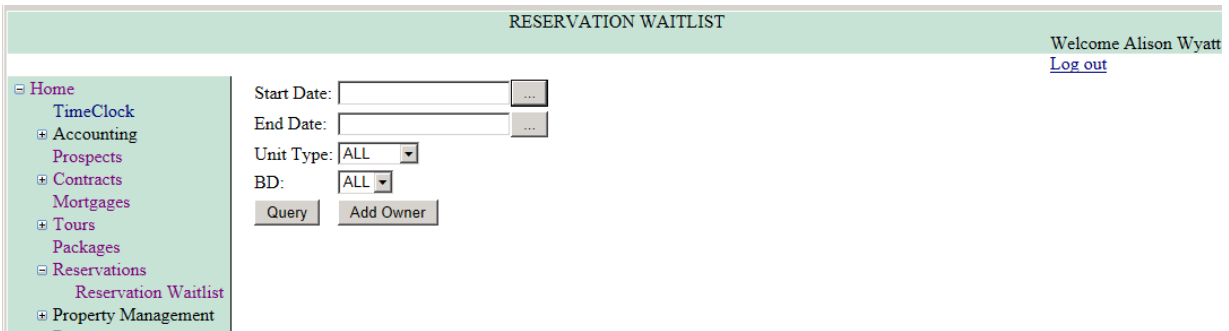
When looking at Estates inventory, units are defined with an “A” for the 2 bedroom unit, “B” for the 1 bedroom downstairs unit and “C” for the 1 bedroom upstairs unit. A 3 bedroom unit would be “AB” and a 4 bedroom unit would be “ABC”.

Estates units are all on streets 14 – 18 so when looking at the inventory, even if the unit type isn’t listed, you should be able to recognize the Estates in this manner. Example: 15-101AB would be a 3 bedroom Estates.

## WAITLIST REQUESTS

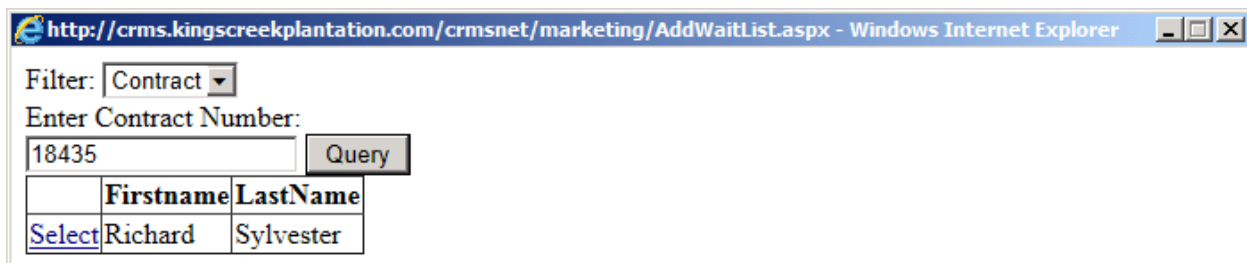
To place an owner on the WAITLIST for dates not currently available or to check what owner is waiting for a specific date, you would:

Locate the RESERVATIONS link on the left side of the screen under HOME. Click on the  sign next to RESERVATIONS to display all the options. Click on the Reservation Waitlist link.

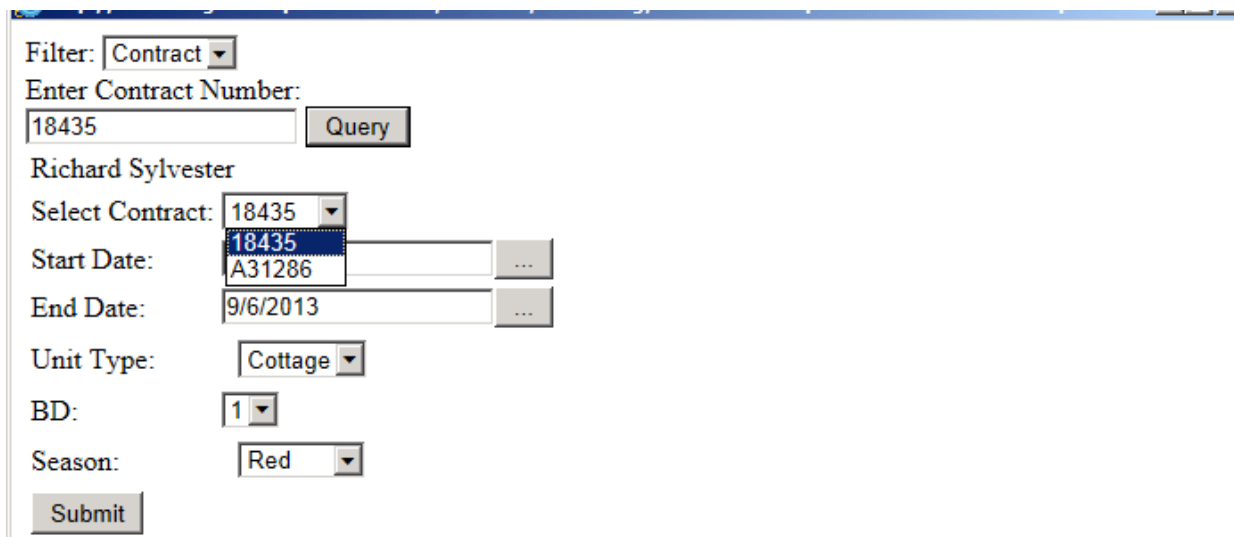


### ADDING AN OWNER TO THE WAITLIST

1. To add an owner to the WAITLIST you would click on the ADD OWNER button and the pop up screen will appear.



1. You can look up your owner by PHONE, NAME (Last Name, First Name) or by CONTRACT number. Once you choose your search method, you will enter the information and click the QUERY button. Your owner's information will appear and you will need to click on the [Select](#) link to the left of your owner's name.



3. You must now fill out the pertinent information for the WAITLIST request such as the CHECK IN DATE (Start Date), CHECK OUT DATE (End Date), UNIT TYPE (Cottage, Townes or Estates), UNIT SIZE (Bedrooms) and Season. Click on the Submit button to complete your request. Please note that you must choose the correct contract. The system does not default to the contract number you used on the first screen.

### **CHECKING FOR OWNERS ON WAITLIST**

1. To view who is on the WAITLIST, you would enter START DATE (first check in date), END DATE (last check in date) and fill out UNIT TYPE. UNIT SIZE (Bedrooms) should be listed as "ALL". Remember that when checking for owners on the Waitlist, you always want to run it for Thursday thru Sunday dates so that you see all owners looking for units that weekend. You do not want to specify on the Saturday as that might not give you the owner who has been waiting the longest.
2. This will list all WAITLIST reservations in the order that they were received from the owners for the specified time frame and unit type. Once an owner accepts or declines a reservation you would click on the [REMOVE](#) link to take them out of the queue.
3. MAKE SURE TO NOTE THE OWNER'S ACCOUNT WHAT DATES THAT YOU OFFERED THEM AND THEIR RESPONSE.

RESERVATION WAITLIST

Welcome Alison Wyatt  
[Log out](#)

Home

TimeClock

Accounting

Prospects

Contracts

Mortgages

Tours

Packages

Reservations

Reservation Waitlist

Property Management

Reports

Personnel

Add-Ins

WorkOrders

Setup

Start Date: 8/29/2013

End Date: 9/1/2013

Unit Type: Townes

BD: ALL

Query

Add Owner

Date Created	Owner	Contract	InDate	OutDate	UnitType	BR	Requested Season	Contract Season	CreatedBy	
5/31/2013	Joan Better	17350	9/1/2013	9/8/2013	Townes	4	Red		JWilliams	<a href="#">Remove</a>
7/15/2013	Tara Ridley	S1207	8/30/2013	9/6/2013	Townes	2	Red	Red	JWilliams	<a href="#">Remove</a>
7/25/2013	Theodore Fuller	A15292	8/29/2013	9/1/2013	Townes	2	Red		CMorris	<a href="#">Remove</a>

### **CREATING A WAITLIST USAGE**

A Waitlist usage should be created any time that you cancel a reservation for a time period when there are owners on the Waitlist. You need to modify the original owner's usage to reflect the new information. To do this you need to click on the button next to the owner's name in the usage that the owner is cancelling.

When you do so, a new box will appear and you must enter Developer in the name field and click on Search. When the KCP Developer contract is displayed, click on the [Select](#) link to the left. This will move the usage out of the original owner's account and into the Developer's account.

	ProspectID	LastName	FirstName
<a href="#">Select</a>	8306627	Developer	KCP

You will now be redirected to the Usage's main page. Update the Contract to "Waitlist", remove the room, click on Save and then add the room back.

Owner: Developer, KCP Date Created: 12/28/2012 11:02:24 AM

Contract: WAITLIST Usage Year: 2013

Type: Owner Sub-Type: Owner

Category: (empty) Amount Promised: 0.0000

Inventory: NONE Status: Used

UnitType: Estates RoomType: 1BD-UP

Days: 7 Points: 0

In-Date: 8/24/2013 Out-Date: 8/31/2013

Save Save & Close [Print Confirmation Letter](#)

Remember to add a note to the usage indicating who you offered the unit to on the Waitlist and until when they have to accept or decline. This will allow any representative to know where we are on the Waitlist without having to access every account. Please note that you must still note the owner's account with the information.

NoteID	Note	DateCreated	Username
2056125	offered unit to KCP 8423. Gave unitl COB 08/25/13 to respond.	8/22/2013 4:23:00 PM	AWyatt

Add Note

## **MOVING A WAITLIST USAGE TO OWNER'S ACCOUNT**

When an owner accepts a unit from the Waitlist, you must remove their name from the list. Please make sure you remove them for all dates they requested for the unit they accepted. To move the usage to their contract, you would follow the same steps that you used to move the usage to the Waitlist originally.

Click on the button next to KCP Developer in the Waitlist usage. When the new box appears, enter the name of the owner accepting the unit. Make sure you update the Contract number and Usage year. Remove the unit, save the usage and add the unit back. The usage will now be tied to your owner's contract and you will now be able to create their reservation.

## **RESERVATIONS**

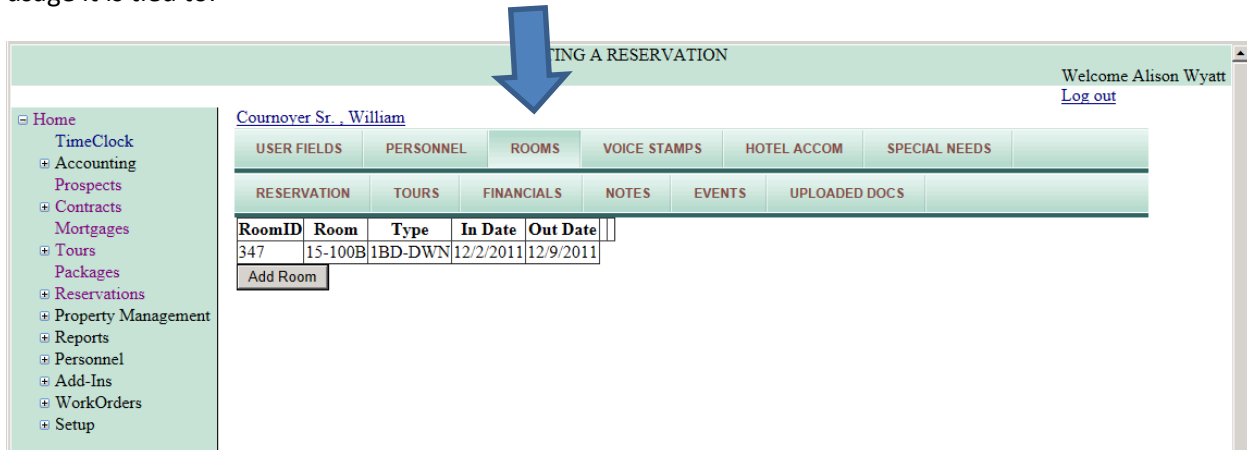
Reservations can be accessed from two areas. You can access an owner's reservations from the Reservations Tab in their Prospect or you can go to the menu on the left side of CRMS and click on Reservations. Should you choose to access the reservation from within your owner's Prospect record, you would need to choose the correct reservation and click on the [Select](#) link next to it and this will open up the reservation so that you can view the details, modify or cancel it. Should you choose to look for the reservation thru the Reservations link on the menu, you can search by Reservation ID (system generated number when reservation is created), Name (Last Name, First Name) or Reservation Number (this is usually a confirmation number given by booking company for Exchange, Points, Rental or Marketing reservations). All reservations will have Reservation IDs and Names, not all will have Reservation Numbers.

## **READING YOUR RESERVATION**

The screenshot shows the 'EDITING A RESERVATION' interface. On the left is a navigation menu with options: Home, TimeClock, Accounting, Prospects, Contracts, Mortgages, Tours, Packages, Reservations (highlighted), Property Management, Reports, Personnel, Add-Ins, WorkOrders, and Setup. The main content area is titled 'EDITING A RESERVATION' and includes a 'Welcome Alison Wyatt' message with a 'Log out' link. Below this is a breadcrumb 'Cournoyer Sr., William' and a series of tabs: USER FIELDS, PERSONNEL, ROOMS, VOICE STAMPS, HOTEL ACCOM, SPECIAL NEEDS, RESERVATION (active), TOURS, FINANCIALS, NOTES, EVENTS, and UPLOADED DOCS. The 'RESERVATION' tab contains the following fields: ReservationID (133897), Status (Completed), Reservation Number (empty), Status Date (12/9/2011 11:18:12 AM), Location (KCP), Type (Owner), Check-In (12/2/2011), Sub-Type (Owner), Check-Out (12/9/2011), #Adults (0), Total Nights (7), #Children (0), Date Booked (11/22/2011), Source ((empty)), Lock Inventory (checked), and Usage(s) (William Cournoyer Sr. - A21241). At the bottom are buttons for Save, Print Rental Letter, Print Letter, Email Letter, and Print Reg Card.

From the Reservation you will be able to see all information pertinent to the reservation such as dates of stay, type of stay, unit, special requests, etc.

The Rooms tab is where you will find what rooms/units have been assigned to the reservation. Remember that you will not be able to change the room in the reservation without first modifying the usage it is tied to.



The screenshot shows the 'EDITING A RESERVATION' interface. The 'ROOMS' tab is selected, and a blue arrow points to it. The interface includes a sidebar with navigation links, a user profile for 'Courmover Sr., William', and a table of reservation details.

RoomID	Room	Type	In Date	Out Date
347	15-100B	1BD-DWN	12/2/2011	12/9/2011

Buttons for 'Add Room' and 'Log out' are visible.

The Special Needs tab is where you would indicate/find any special needs for your guest. These should include handicap units, lower unit due to needing less stairs, pak 'n play requests.



The screenshot shows the 'EDITING A RESERVATION' interface. The 'SPECIAL NEEDS' tab is selected, and a blue arrow points to it. The interface includes a sidebar with navigation links, a user profile for 'Courmover Sr., William', and a table of special needs.

Select	SpecialNeedID	SpecialNeed
<a href="#">Edit</a>	530	Handicapped

Buttons for 'ADD NEW', 'REFRESH', and 'Log out' are visible.

The Notes tab is used to track any information specific to the reservation. This could include special requests, questions by owner or who will be arriving first for check in.

The Financials tab in owners reservations is only used when charging the owner a name change fee or a cancellation fee.

## **CREATING AN OWNER - OWNER RESERVATION**

To create an OWNER – OWNER reservation once usage is done, you must go to the owner's PROSPECT page and click on the RESERVATION tab.

Once in the RESERVATION screen you must fill out all pertinent information.

1. LOCATION will always be KCP as your owner will be staying on property.
2. CHECK IN and CHECK OUT dates should be the dates your owner is requesting and match the dates you placed in their USAGE.
3. TOTAL NIGHTS auto-fills for 7 nights the length of any owner stay that you will be booking.
4. DATE BOOKED is the date the owner called in to book his time.
5. Whenever you are building your owner's reservation, if it has dates on it, the STATUS MUST be Booked.
6. Your TYPE and SUB-TYPE should always match what you place in the usage you created for him. In this case, since this is an OWNER – OWNER reservation, this is what you want to input, and then click on SAVE. If you do not save the reservation first, you will not be able to add the rooms to the reservation.
7. You should only use the Lock Inventory function if there is a reason that owner should not be moved from unit, for example they need a lower level Townes unit because they have trouble with stairs. Please remember to add a note as to why you are locking the unit and to also add the reason to the SPECIAL NEEDS tab.

When adding a room to an OWNER – OWNER reservation you must:

1. Click on the ROOMS tab while in the reservation and you will have two options to choose the room you are allocating.
2. Your first choice will be to click on the OWNER USAGE button which will bring up the option of choosing the Same Owner or Different Owner. Since this is an OWNER – OWNER reservation, you will choose to click on the Same Owner button and then the Usage Year and when you click on the Search button, the room that you allocated in the usage screen will appear for you to choose. Check off the unit and click on the Submit button and your reservation will now be created.
3. The second option for choosing the room for your reservation is by clicking on the ROOM FILTER button. With this method you will have to choose the BD (unit size), UNIT TYPE that you are booking, INV TYPE (as this is an Owner reservation, this should always be Owner) and the system will display the rooms available when you click on the Search button. Check off the unit and click the Select Rooms button to complete your reservation. Remember that since you are not specifying your owner's unit, that should there be 2 owner usages for the same date and unit type, you would see both of them. It is not recommended to use this option for owner reservations.

**DO NOT FORGET** to check notes prior to moving a unit from one reservation to another to avoid taking a requested unit from someone.

## **CANCELLING AN OWNER RESERVATION WITH A CANCEL FEE**

When your owner calls in to cancel his reservation as he cannot use his dates, there are a few steps to be followed as well as a fee to be charged.

1. Change the STATUS of your reservation to Cancelled and remember to remove the room from the ROOMS tab.

EDITING A RESERVATION

Welcome Alison Wyatt  
[Log out](#)

**RESERVATION** TOURS FINANCIALS NOTES EVENTS UPLOADED DOCS

ReservationID: 168712 Status: Cancelled

Reservation Number: Status Date: 6/3/2013

Location: KCP Type: Owner

Check-In: 6/14/2014 Sub-Type: Owner

Check-Out: 6/21/2014 #Adults: 0

Total Nights: 7 #Children: 0

Date Booked: 4/24/2013 Source: (empty)

Lock Inventory: ☐ Usage(s):

Save Print Rental Letter Print Letter Email Letter Print Reg Card

2. You will now have to charge your owner a cancel fee by first clicking on the FINANCIALS tab.

http://crms.kingscreekplantation.com/crmsnet...

Trans Code: OS Cancel Fee

Amount: 50.00

Reference: Cancelled Reservation

Trans Date: 8/23/2013

Due Date: 8/23/2013

User:

Save Close

3. Remember that before you can take a payment from your owner you will have to create an invoice, so click on the INVOICE tab and when the pop up box appears, fill out the required information. The TRANSACTION CODE must ALWAYS begin with OS for an owner services charge, so in this case you will choose OS Cancel Fee. The amount of the charge for a cancelled reservation is \$50.00. The reference line is the reason for the charge. Transaction Date is the date that you are creating the invoice and Due Date is when it must be paid. For an OS Cancel Fee, the Trans Date and Due Date should be the same as you should not be creating the invoice until the owner cancels and pays. By clicking on the SAVE button your invoice is created.

4. You can now take your payment.

5. Click on the PAYMENT/ADJUSTMENT button and when the pop up box appears, fill out all required fields such as Payment Type, click on the Charge radial button, Card Number and the owner's billing information. You have the option to click on the Retrieve Address button and the active address on file will populate. If you use this option, make sure that the address matches the billing address being used by the owner. You will have to enter the amount of the charge and the Description (this should



be what the charge is for, and should match what you entered in the Reference section when you created the invoice. Don't forget to check off the invoice you are applying the payment against or the system will give you an error when you click on the Process Charge button. Don't worry that you don't see the payment at this juncture, it will have to be approved by the Finance Department before you can view it under the financials.

http://crms.kingscreekplantation.com/crmsnet/general/takepayment.aspx?ProspectID=84977548...

Payment Type:

☒ Charge ☐ Force ☐ Manual ☐ Voice Auth

Swipe:

Card Number:

CVV2:

Billing Address:

State:

Amount:

Description:

[Card\(s\) on file](#)

Expiration (MMYY):

Name On Card:

City:

Postal Code:

Authorization:

	ID	Acct	Invoice	TransDate	Amount	Balance
<input checked="" type="checkbox"/>	433913	4	OS Cancel Fee	8/23/2013 12:00:00 AM	50.00	50.00

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USER FIELDS	PERSONNEL	ROOMS	VOICE STAMPS	HOTEL ACCOM	SPECIAL NEEDS
RESERVATION	TOURS	FINANCIALS	NOTES	EVENTS	UPLOADED DOCS

Balance: \$0.00

Invoice	TransDate	Due Date	Orig. Amount	Adj. Amount	Balance
OS Cancel Fee	Jun-03-2013	Jun-03-2013	\$50.00	\$50.00	\$0.00

Payments

PaymentID	Method	TransDate	Amount	Applied
375666	AMEX	Jun-03-2013	(\$50.00)	(\$50.00)

Adjustments

No History.

Scheduled Payments

No History.

INVOICE	INVOICE ADJUSTMENT	PAYMENT / ADJUSTMENT	REFUND	REFRESH
SCHEDULE PAYMENT	CANCEL SCHEDULED PAYMENTS	TRANSFER PAYMENT	STATEMENT OF ACCOUNT	

6. Once your payment is approved by the Finance Department (they normally approve charges once a day), a copy of the receipt will be available and should your owner want a copy you can print it from here and send it to them.

7. You must now go to your owner's usage that was tied to the now cancelled reservation, remove the room (see Waitlist section) and change the status to Not Used. As a usage cannot be deleted, this will indicate to another representative that your owner still has usage available. When the owner calls back in with what he wants done with his time, you must modify the usage by changing the dates, the status and adding a room back in to the usage. Please note that you cannot modify a usage with past dates.

## **CREATING AN OWNER – NON OWNER RESERVATION**

You can create an OWNER – NON OWNER reservation when the owner calls in to request dates and advises you at that time that he is giving his unit to another person OR when the owner calls in AFTER already making his reservation and requests to change his name to his guest's name. REMEMBER! Should an owner change the name on the reservation after booking there is a \$40 fee that must be collected. Please note that the first time the owner requests the name be changed, the fee is waived as a courtesy. Do not create and invoice and waive it. Waiver adjustments should only be used for mandatory invoices such as Late fees.

We will first go thru the steps of booking an OWNER – NON OWNER reservation where the owner advises at time of booking that someone else will be using the unit.

1. To book an OWNER – NON OWNER reservation you must create the usage under the owner's contract first. Make sure that you choose TYPE: Owner and SUB-TYPE: Non-Owner. Remember to add your room.
2. Your next step will be to create the reservation but you cannot do it under your owner's account as he is not the one using the unit. You will have to create or add to a PROSPECT in the system with your owner's guest information and then add the reservation to that account.
3. Go to the MENU and click on the PROSPECTS link. Enter your guest's name, address or phone number and click on the Query button.
4. If your guest's information is already in the system you will only have to create the reservation. If you pull up the guest information by name or phone number make sure that it is correct information in the system.
5. Should no information come up, you will have to now click on the NEW button to create your guest's account.
6. When creating a PROSPECT record for your guest, get as much information about them as possible, including name, address, phone number, email address and marital status. If you do not get an address from your guest, should they have charges during their stay, the Front Desk staff will not be able to charge their credit card, so please get all information possible. (See Creating a Prospect under the Prospect section of this manual).

Once in the RESERVATION screen you must fill out all pertinent information.

1. LOCATION will always be KCP as your guest will be staying on property.
2. CHECK IN and CHECK OUT dates should be the dates your owner is requesting and match the dates you placed in their USAGE.
3. TOTAL NIGHTS auto-fills for 7 nights the length of any owner stay that you will be booking.
4. DATE BOOKED is the date the owner called in to book his time.
5. Whenever you are building your guest's reservation, if it has dates on it, the STATUS MUST be Booked.
6. Your TYPE and SUB-TYPE should always match what you place in the usage you created for him. In this case, since this is an OWNER – NON OWNER reservation, this is what you want to input, and then click on SAVE. If you do not save the reservation first, you will not be able to add the rooms to the reservation.
7. You should only use the Lock Inventory function if there is a reason that owner should not be moved from unit, for example they need a lower level Townes unit because they have trouble with stairs. Please remember to add a note as to why you are locking the unit and to also add the reason to the SPECIAL NEEDS tab.

When adding a room to an OWNER – NON OWNER reservation you must:

1. Click on the ROOMS tab while in the reservation and you will have two options to choose the room you are allocating.
2. Your first choice will be to click on the OWNER USAGE button which will bring up the option of choosing the Same Owner or Different Owner. Since this is an OWNER – NON-OWNER reservation, you will choose to click on the Different Owner button. You will then have to search by your owner's name or by their KCP#. Once you have chosen your search method, you will then choose the Usage Year, fill out either your owner's name or their KCP# and when you click on the Search button, the room that you allocated in the usage screen will appear for you to choose. Check off the unit and click on the Select Rooms button and your reservation will now be created.

Usage Year: 2013 KCP#: 12345 Search

2. The second option for choosing the room for your reservation is by clicking on the ROOM FILTER button. With this method you will have to choose the BD (unit size), UNIT TYPE that you are booking, INV TYPE (as this is an Owner reservation, this should always be Owner) and the system will display the rooms available when you click on the Search button. Check off the unit and click the Select Rooms button to complete your reservation. Remember that since you are not specifying your owner's unit, that should there be 2 owner usages for the same date and unit type, you would see both of them. It is not recommended to use this option for owner reservations.

BD: 2 Unit Type: Townes Inv Type: Owner Spares: ☐ Search

Select	RoomNumber	RoomType	RoomSubType	Category
<input checked="" type="checkbox"/>	10-202A	2BD	FRI	N/A

Select Rooms

**DO NOT FORGET** to check notes prior to moving a unit from one reservation to another to avoid taking a requested unit from someone.

## CREATING AN OWNER – NON OWNER RESERVATION WITH A NAME CHANGE FEE

If an owner calls in to change their reservation from OWNER-OWNER to OWNER – NON OWNER there are a few more steps to the process. Your first step is to advise them of the \$40 Name Change fee that will be charged to their credit card and you must collect the card number from them at that time. Remember that the first time they request a name change the fee is waived as a courtesy.

1. You will need to go to your owner's reservation and change the STATUS to Cancelled.
2. Go to the ROOMS tab and Remove the room from the reservation to make it available for your guest's reservation. Make sure you note the account as to why you are cancelling the reservation so as not to have any questions at a later date.
3. If applicable, you must now charge the NAME CHANGE fee. As the owner is paying you this fee, you will charge it under the reservation that you are cancelling.

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[Cournoyer Sr., William](#)

USER FIELDS	PERSONNEL	ROOMS	VOICE STAMPS	HOTEL ACCOM	SPECIAL NEEDS
RESERVATION	TOURS	FINANCIALS	NOTES	EVENTS	UPLOADED DOCS

Balance: \$0.00

INVOICE	INVOICE ADJUSTMENT	PAYMENT / ADJUSTMENT	REFUND	REFRESH
SCHEDULE PAYMENT	CANCEL SCHEDULED PAYMENTS	TRANSFER PAYMENT	STATEMENT OF ACCOUNT	

4. Go to the FINANCIALS tab and click on the INVOICE button on the bottom left of the screen. When the pop up box appears you must enter the Trans Code (this must ALWAYS have OS in front of your choice!), Amount (amount to be charged), Reference (what you are charging for), Trans Date (the date you created the invoice) Due Date (in the case of an OS Name Change fee, the Due Date should match the Trans Date as you should not be creating this invoice until the owner requests the change) and click on the SAVE button.

http://crms.kingscreekplantation.com/crmsnet...

Trans Code: OS Name Change

Amount: 40.00

Reference: giving res to another

Trans Date: 8/23/2013

Due Date: 8/23/2013

User:

Save Close

5. Click on the PAYMENT/ADJUSTMENT button and when the pop up box appears, fill out all required fields such as Payment Type, click on the Charge radial button, Card Number and the owner's billing information. You have the option to click on the Retrieve Address button and the active address on file will populate. If you use this option, make sure that the address matches the billing address being used by the owner. You will have to enter the amount of the charge and the Description (this should be what the charge is for, and should match what you entered in the Reference section when you created the invoice. Don't forget to check off the invoice you are applying the payment against or the system will give you an error when you click on the Process Charge button. Don't worry that you don't see the payment at this juncture as it will have to be approved by the Finance Department before you can view it under the financials.
6. Go to your owner's USAGE. You will have to remove the room, change the SUB-TYPE to Non-Owner and then SAVE. Now add your room back.
7. Your next step will be to create the reservation but you cannot do it under your owner's account as he is not the one using the unit. You will have to create or add to a PROSPECT in the system with your owner's guest information and then add the reservation to that account. The next steps are identical to those that can be found under CREATING AN OWNER- NON OWNER RESERVATION.

### **CREATING A TRIAL OWNER RESERVATION**

To create a TRIAL OWNER reservation once usage is done, you must go to the owner's PROSPECT page and click on the RESERVATION tab.

Once in the RESERVATION screen you must fill out all pertinent information.

1. LOCATION will always be KCP as your owner will be staying on property.
2. CHECK IN and CHECK OUT dates should be the dates your owner is requesting and match the dates you placed in their USAGE.
3. TOTAL NIGHTS auto-fills for 7 nights the length of any owner stay that you will be booking.
4. DATE BOOKED is the date the owner called in to book his time.
5. Whenever you are building your owner's reservation, if it has dates on it, the STATUS MUST be Booked.
6. Your TYPE and SUB-TYPE should always match what you place in the usage you created for him. In this case, since this is a TRIAL OWNER – OWNER reservation, this is what you want to input, and then click on SAVE. If you do not save the reservation first, you will not be able to add the rooms to the reservation.
7. You should only use the Lock Inventory function if there is a reason that owner should not be moved from unit, for example they need a lower level Townes unit because they have trouble with stairs. Please remember to add a note as to why you are locking the unit and to also add the reason to the SPECIAL NEEDS tab.

When adding a room to a TRIAL OWNER – OWNER reservation you must:

1. Click on the ROOMS tab while in the reservation and you will have two options to choose the room you are allocating.
2. Your first choice will be to click on the OWNER USAGE button which will bring up the option of choosing the Same Owner or Different Owner. Since this is a TRIAL OWNER – OWNER reservation, you will choose to click on the Same Owner button and then the Usage Year and when you click on the Search button, the room that you allocated in the usage screen will appear for you to choose. Check off the unit and click on the Submit button and your reservation will now be created.
3. The second option for choosing the room for your reservation is by clicking on the ROOM FILTER button. With this method you will have to choose the BD (unit size), UNIT TYPE that you are booking, INV TYPE (as this is a Trial Owner reservation, this should always be Trial Owner) and the system will

display the rooms available when you click on the Search button. Check off the unit and click the Select Rooms button to complete your reservation. Remember that since you are not specifying your owner's unit, that should there be 2 owner usages for the same date and unit type, you would see both of them. It is not recommended to use this option for owner reservations.

**DO NOT FORGET** to check notes prior to moving a unit from one reservation to another to avoid taking a requested unit from someone.

## **CREATING AN EXCHANGE RESERVATION**

You will create an EXCHANGE reservation only once the Exchange company sends you the guest information for the person(s) that are staying in your owner's exchange unit or when the information is available in the Exchange company's system.

1. Your next step will be to create the reservation but you cannot do it under your owner's account as he is not the one using the unit. You will have to create or add to a PROSPECT in the system with your owner's guest information and then add the reservation to that account. Depending on what information the Exchange Company sends you, you will look up your guest information either by Name, Address or Phone Number.

Unfortunately the Exchange Company does not always give as much information as you will need to make sure that if your guest comes up by name under PROSPECT that it is actually your guest. If all they give you is a name, you CANNOT assume that any of these prospects is yours. If you are not sure, you will have to create a new PROSPECT with the limited information sent to you by the Exchange company by clicking on the NEW button. If the Exchange Company does give you enough information to match your guest with an existing PROSPECT, you may add their reservation to the existing account. MAKE SURE you do not alter any prospect information in case they have a contract with us.

2. Enter the information given to you by the Exchange Company, in this case FIRST NAME, LAST NAME and then click the SAVE button. Once that is completed you can create your exchange guest's stay by clicking on the RESERVATIONS tab.

3. Once in the RESERVATIONS screen you must fill out all pertinent information.

EDITING A RESERVATION

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[Booth, Jason](#)

USER FIELDS	PERSONNEL	ROOMS	VOICE STAMPS	HOTEL ACCOM	SPECIAL NEEDS
RESERVATION	TOURS	FINANCIALS	NOTES	EVENTS	UPLOADED DOCS

ReservationID: 175209 Status: Booked

Reservation Number: 017641868 Status Date: 7/18/2013

Location: KCP Type: Exchange

Check-In: 8/24/2013 Sub-Type: II

Check-Out: 8/31/2013 #Adults: 0

Total Nights: 7 #Children: 0

Date Booked: 7/18/2013 Source: (empty)

Lock Inventory: ☐ Usage(s): [Vincent Blake - 25125](#)

[Save](#) [Print Rental Letter](#) [Print Letter](#) [Email Letter](#) [Print Reg Card](#)

- a. LOCATION will always be KCP as your guest will be staying on property.
- b. CHECK IN and CHECK OUT dates should be the dates your exchange guest is requesting and match the dates that were placed in the owner's USAGE.
- c. TOTAL NIGHTS auto-fills for 7 nights. Please note that the Exchange companies do not always book their guests for 7 nights, so make sure to verify the length of the stay and choose the correct number of nights. If you alter the number of nights from 7, the system will automatically calculate the new check out date.
- d. DATE BOOKED is the date that the Exchange company sent over the reservation information.
- e. Whenever you are building your guest's reservation, if it has dates on it, the STATUS MUST be Booked.
- f. Your TYPE and SUB-TYPE should always match what you place in the usage you created for him. In this case, since this is an EXCHANGE – II reservation, this is what you want to input, and then click on SAVE. If you do not save the reservation first, you will not be able to add the rooms to the reservation.

3. Click on the ROOMS tab to add the room to the reservation and then the Add Rooms button on the bottom left of screen. When the pop up box appears, you can choose to add the room by clicking the OWNER USAGE or ROOM FILTER button. If the Exchange Company has let you know which of your owners' units they are putting their guest in, it is easiest to choose the OWNER USAGE button. You can then input your owner's information using their name or their exchange membership number. When you enter the NAME and USAGE YEAR and click on the Search button it will bring up the units tied to your owner that fall under your specifications. Check the unit box that you need and click SUBMIT to add the room to your guest's reservation.

Select	RoomNumber	RoomType	RoomSubType	Category
<input type="checkbox"/>	13-111A	2BD	SAT	N/A

5. You can now see in your guest's account which owner's usage is linked to your reservation.
6. You can also go to your owner's Exchange usage, open it, click on the RESERVATIONS tab and it will show you which reservation is linked to that particular usage. From this page you can click on the [Select](#) link next to the reservation details and it will bring you into that specific reservation.
7. Should the Exchange Company send you a request to cancel the reservation you would change the STATUS to Cancelled and you MUST remove the room to make it available to the next guest the Exchange company sends in to use the owner's week.
8. Remember to notate the reservation with the reason that you cancelled the reservation.

## CONFIRMATION LETTERS

There are three ways to print your owner's confirmation letter for their reservation. You will also be able to email your owner's confirmation letter to them thru one of these options.

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	ID	Name	Desc	Path
<a href="#">Select</a>	148	Allocation Mismatches	Allocation Mismatches	AllocationMismatches.aspx
<a href="#">Select</a>	145	Bank Report	Bank Report	BankReport.aspx
<a href="#">Select</a>	149	Busch Gardens Invoice	Busch Gardens Invoice	imported/BuschGardensInvoice.asp
<a href="#">Select</a>	155	Check By Phone Payments	Check By Phone Payments	imported/PendingCBP.asp
<a href="#">Select</a>	162	Check Ins By Day	Check Ins By Day	imported/CheckInsByDay.htm
<a href="#">Select</a>	173	Confirmation Letters	Confirmation Letters	ConfirmationLetters.aspx
<a href="#">Select</a>	211	Conversions By Anniversary Date	Conversions By Anniversary Date	conversionsbyanniversarydate.aspx
<a href="#">Select</a>	163	Fixed Week Owner Report	Fixed Week Owner Report	imported/fixed_week_owner_report.asp
<a href="#">Select</a>	177	ORF Report	ORF Report	ORFReport.aspx
<a href="#">Select</a>	164	Out Of Service Rooms	Out Of Service Rooms	OutOfService.aspx
<a href="#">Select</a>	153	Owner Inventory	Owner Inventory	imported/OwnerInventory.asp
<a href="#">Select</a>	154	Owner Notebook	Owner Notebook	imported/OwnerNotebook.asp
<a href="#">Select</a>	150	Reservation Banking	Reservation Banking	imported/ReservationWeekBank.asp
<a href="#">Select</a>	152	Unrented Rental Usages	Unrented Rental Usages	imported/UnrentedRentalUsages.asp
<a href="#">Select</a>	151	Usage By Day	Usage By Day	imported/UsageByDay.htm
<a href="#">Select</a>	214	Usage Inventory Mismatch	Usage Inventory Does not match Usage Room Type	usagemismatches.aspx
<a href="#">Select</a>	166	Usages With MF Balance	Usages With MF Balance	imported/UsageMFBalances.asp

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## REPORTS

The first way is through the REPORTS option in the CRMS menu. Click on the + next to the REPORTS link to display all the options.

1. Once in the REPORTS link, you must click on the OWNER SERVICES option. On the main screen you will now see all the different Owner Service reports available to you. Click on the [Select](#) link next to Confirmation Letters.
2. To print your confirmation letter from this screen you must choose your type of reservation – Resort Stay or Banking. Click on the appropriate radial button and then enter the RESERVATION ID that was created when you built your reservation and click on the Run Report button. Please note that if you are printing a BANKING confirmation letter you will have to enter the USAGE ID that was created when you built your owner's usage. When your confirmation letter pulls up, just print the page.
3. You will notice that you may also choose to pull confirmation letters created within a date range. Note that this will pull ALL reservations created during the range chosen.

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### Confirmation Letters

[Resort Stay](#)

☒ King's Creek Plantation, Williamsburg

[Banking](#)  
☐ RCI Banking  
☐ II Banking  
☐ ICE Banking

Run Report

Date Range  
 -

Reservation ID  
☒ 143529



## **RESERVATION CONFIRMATION**

The second option for printing your confirmation letter is on the reservation itself.

1. After building the reservation and adding the ROOMS, you can click on the PRINT LETTER button on the bottom of the screen and the confirmation letter will appear in a pop up box.
2. You will be able to print it from the pop up. This option is to be used only on actual OWNER or TRIAL OWNER reservations. All other reservation types (Points, Exchange, Rental, etc) would receive a confirmation letter from the company they booked thru and might contain different information than what is listed on our Owner confirmation letters.
3. You will also be able to email your owner's confirmation letter to them from this screen by clicking on the EMAIL LETTER button on the bottom of the screen. The letter will be emailed to the active email address listed in the owner's prospect record. The system will generate a note that the letter have been sent by email.

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[Inahuazo, Fernando](#)

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RESERVATION	TOURS	FINANCIALS	NOTES	EVENTS	UPLOADED DOCS

ReservationID: 175485 Status: Booked

Reservation Number: Status Date: 7/22/2013

Location: KCP Type: Owner

Check-In: 7/27/2013 Sub-Type: Non-Owner

Check-Out: 8/3/2013 #Adults: 0

Total Nights: 7 #Children: 0

Date Booked: 7/22/2013 Source: (empty)

Lock Inventory: ☐ Usage(s): [Joseph Smolda Jr. - 11934R](#)  
[Joseph Smolda Jr. - 11934R](#)

Save Print Rental Letter Print Letter Email Letter Print Reg Card

## **USAGE CONFIRMATION**

The third option for printing your confirmation letter is from the USAGE screen. After building the usage and adding the ROOMS, you can click on the PRINT CONFIRMATION LETTER option on the bottom of the screen and the confirmation letter will appear in a pop up box and you will be able to print it from there. This option is to be used only on EXCHANGE usage as no reservation is created at time of banking.

## PLACING BANKING REQUESTS

When a Legacy owner requests that their week(s) be banked with one of the Exchange companies, they may request that specific dates be deposited or only have a general request. They may also request a "Search First". The processes for each of these options are listed below.

### GENERAL BANKING REQUEST

When an owner requests that their week(s) be deposited with an Exchange company but does not specify dates to be deposited, the following steps must be completed.

1. Verify that the owner does not have any outstanding fees due, such as Maintenance fees or Late fees.
2. Verify that the owner is not delinquent on their mortgage.
3. Verify that the owner still has access to weeks for the year they are requesting deposited.
4. Verify that the owner's membership with the Exchange company of their choice is active thru the end of the next calendar year.
5. Once all of the above have been verified, you will need to note your owner's account (both in Contract notes and Prospect notes) with the details of the owner's request. If this step isn't completed, the banking request will be denied and sent back as unable to complete. The information to be included in the note is the usage year, unit size, unit type that the owner wants deposited and the name of the Exchange company they are requesting to deposit with.
6. Your next step is to go to the Menu and click on the + next to Property Management. This will allow you to see all of the options. Click on the Banking link to bring up the request screen. Remember to always verify that your owner is not already listed on the report for their request prior to adding them. To do this, enter a Start Date (go back 18 months), End Date (enter today's date), enter your Contract Number and click on the List button. You will now see all requests made during the timeframe chosen. If your request is not already listed, you are fine to proceed by clicking on the Create New button.

	Owner	ContractNumber	Status	StatusDate	CreatedBy	DepositedBy	YearUsed	DepositYear	UnitType	MemberShipNumber
Select	Kasick, Karen	A12341	Complete	1/13/2012	FAbraham	PWilliams	2011	2012	Townes	241-6882
Select	Kasick, Karen	A12341	Complete	11/14/2012	FAbraham	DGregoire	2012	2012	Townes	241-6882

7. A new screen will appear and you must fill out all the required information. For a General Banking Request you will not have to fill out Unit Deposited, Week Deposited, Year Used, Date

Deposited or Confirmation Number. All other information requested MUST be filled out to be considered a valid request. When creating a request, the Status should always be set as Pending. Once all the information required is filled out, click on the Submit button. Note that you will have to place a request for each week that is requested separately. For example, should your owner ask to deposit their 3 bedroom Cottage as a 1 bedroom and 2 bedroom, you would place 2 requests. Should they ask to have their 3 bedroom deposited as a whole unit, you would only place the one request.

The screenshot shows a web browser window with the URL <http://crms.kingscreekplantation.com>. The page title is "BANK". In the top right corner, it says "Welcome Alison Wyatt" with a "Log out" link. On the left is a navigation menu with categories like Home, Accounting, Prospects, Contracts, Mortgages, Tours, Packages, Reservations, Property Management, Reports, Personnel, Add-Ins, WorkOrders, and Setup. The main content area contains a form for creating a new deposit request. The form has fields for Username (set to ALL), Exchange Comp. (set to ALL), Status (set to ALL), Start Date (12/27/2011), End Date (8/23/2013), Run By Date Entered (checkbox), and Contract Number (A12341). Below these are "List" and "Create New" buttons. A message states: "All information in RED is required for initial entry." The form fields are as follows: First Name (Karen), Last Name (Kasick), Type Of Unit (Cottage), Frequency (Annual), Usage (Red), Usage Year (2014), Unit Size (1BD), Exchange Company (II), Membership Number (241-6882), Contract Number (A12341), Status (Pending), Status Date, and Unit Deposited (test). There is an "Add" button next to the Unit Deposited field. Below the form is a "Remove" button. At the bottom are "Submit" and "Reset" buttons.

8. Once you have submitted your request, click on the List button again to confirm that your request(s) are complete.

### **SET DATE BANKING REQUEST (CANCELLING A RESERVATION)**

When an owner requests that their week(s) be deposited with an Exchange company and requests to cancel a reservation and deposit that date, the following steps must be completed.

1. Verify that the owner does not have any outstanding fees due, such as Maintenance fees or Late fees.
2. Verify that the owner is not delinquent on their mortgage.

3. Verify that the owner has not used the week they are requesting deposited.
  4. Verify that the owner's membership with the Exchange company of their choice is active thru the end of the next calendar year.
  5. Once the above has been confirmed, you will need to cancel the owner's reservation by removing the room and changing the reservation status to cancelled. You will leave the usage as is, as it will be reused for the deposit.
  6. You will need to note your owner's account (both in Contract notes and Prospect notes) with the details of the owner's request. If this step isn't completed, the banking request will be denied and sent back as unable to complete. The information to be included in the note is the usage year, unit size, unit type, the date(s) that the owner wants deposited and the name of the Exchange company they are requesting to deposit with.
  7. Your next step is to go to the Menu and click on the + next to Property Management. This will allow you to see all of the options. Click on the Banking link to bring up the request screen. Remember to always verify that your owner is not already listed on the report for their request prior to adding them. To do this, enter a Start Date (go back 18 months), End Date (enter today's date), enter your Contract Number and click on the List button. Remember to keep Status as ALL in case the request has been sent back due to an issue. You will now see all requests made during the timeframe chosen. If your request is not already listed, you are fine to proceed by clicking on the Create New button.
  8. A new screen will appear and you must fill out all the required information. For a Set Date Banking Request you will not have to fill out the Confirmation Number. All other information requested MUST be filled out to be considered a valid request. When creating a request, the Status should always be set as Pending.
- Once all the information required is filled out, click on the Submit button. Note that you will have to place a request for each week that is requested separately. For example, should your owner ask to deposit their 3 bedroom Cottage as a 1 bedroom and 2 bedroom, you would place 2 requests. Should they ask to have their 3 bedroom deposited as a whole unit, you would only place the one request.

The screenshot shows a web application interface for managing banking requests. On the left is a sidebar menu with categories like Home, Accounting, Prospects, Contracts, Mortgages, Tours, Packages, Reservations, Property Management (expanded), Reports, Personnel, Add-Ins, WorkOrders, and Setup. Under Property Management, options include Rooms, Units, Inventory Allocation, Room Inventory Allocation, Spare Room Allocation, Quick Check Availability, Room Usage, In/Out of Service, Banking, Bulk Bank Wizard, Resort Overview, OPC-OS Concierge Report, Maintenance Requests, Room Matrix, and Rental Pool Limits. The main form area is titled 'Banking Request' and contains the following fields:

- Username: ALL (dropdown)
- Exchange Comp.: ALL (dropdown)
- Status: ALL (dropdown)
- Start Date: 1/1/2013 (calendar icon)
- End Date: 8/26/2013 (calendar icon)
- Run By Date Entered: (checkbox)
- Contract Number: 8430
- Buttons: List, Create New
- Message: All information in RED is required for initial entry.
- First Name: Richard
- Last Name: Hill
- Type Of Unit: Cottage (dropdown)
- Frequency: Biennial (dropdown)
- Usage: Red (dropdown)
- Usage Year: 2014 (dropdown)
- Unit Size: 1BD (dropdown)
- Exchange Company: II (dropdown)
- Membership Number: 2468597
- Contract Number: 8430
- Status: Pending (dropdown)
- Status Date: (empty)
- Unit Deposited: test (dropdown) Add (button)
- 1-105B (text input) Remove (button)
- Week Deposited: 10 (dropdown)
- Year Used: 2014 (dropdown)
- Date Deposited: 3/8/2014 (calendar icon)
- Confirmation Number: (empty)
- Buttons: Submit, Reset

- Once you have submitted your request, click on the List button again to confirm that your request(s) are complete.

BANK

Welcome Alison Wyatt  
[Log out](#)

- Home
- TimeClock
- Accounting
- Prospects
- Contracts
- Mortgages
- Tours
- Packages
- Reservations
- Property Management
  - Rooms
  - Units
  - Inventory Allocation
  - Room Inventory Allocation
  - Spare Room Allocation
  - Quick Check Availability
  - Room Usage
  - In Out of Service
  - Banking
  - Bulk Bank Wizard
  - Resort Overview
  - OPC-OS Concierge Report
- Maintenance Requests
- Room Matrix
- Rental Pool Limits
- Reports
- Personnel
- Add-Ins
- WorkOrders
- Setup

UserName:   
Exchange Comp.:   
Status:   
Start Date:    
End Date:    
Run By Date Entered: ☐  
Contract Number:

	Owner	ContractNumber	Status	StatusDate	CreatedBy	DepositedBy	YearUsed	DepositYear	UnitType	MemberShipNumber	DateDeposited	UnitSize	RoomNumber	Usage	Frequency	ExchangeCompany	DateCreated
Select	Hill, Richard	8430	Pending	8/26/2013	A.Wyatt		2014	2014	Cottage	2468597	3/8/2014	1BD	1-105B	Red	Biennial	II	8/26/2013 12:51:00 PM

### **SET DATE BANKING REQUEST (NO EXISTING RESERVATION)**

When an owner requests that their week(s) be deposited with an Exchange company and requests to deposit a specific date, the following steps must be completed.

- Verify that the owner does not have any outstanding fees due, such as Maintenance fees or Late fees.
- Verify that the owner is not delinquent on their mortgage.
- Verify that the owner has not used the week they are requesting deposited.
- Verify that the owner's membership with the Exchange company of their choice is active thru the end of the next calendar year.
- Once the above has been confirmed, you will need to create a usage in the owner's account for the dates the owner requested. You will create an Owner usage and add the available inventory. The individual that completes the banking requests will change it to Exchange.
- You will need to note your owner's account (both in Contract notes and Prospect notes) with the details of the owner's request. If this step isn't completed, the banking request will be denied and sent back as unable to complete. The information to be included in the note is the usage year, unit size, unit type, the date(s) that the owner wants deposited and the name of the Exchange company they are requesting to deposit with.
- Your next step is to go to the Menu and click on the + next to Property Management. This will allow you to see all of the options. Click on the Banking link to bring up the request screen. Remember to always verify that your owner is not already listed on the report for their request prior to adding them. To do this, enter a Start Date (go back 18 months), End Date (enter today's date), enter your Contract Number and click on the List button. Remember to keep Status as ALL in case the request has been sent back due to an issue. You will now see all requests made during the timeframe chosen. If your request is not already listed, you are fine to proceed by clicking on the Create New button.
- A new screen will appear and you must fill out all the required information. For a Set Date Banking Request you will not have to fill out the Confirmation Number. All other information requested MUST be filled out to be considered a valid request. When creating a request, the Status should always be set as Pending.

Once all the information required is filled out, click on the Submit button. Note that you will have to place a request for each week that is requested separately. For example, should your owner ask to deposit their 3 bedroom Cottage as a 1 bedroom and 2 bedroom, you would place 2 requests. Should they ask to have their 3 bedroom deposited as a whole unit, you would only place the one request.

- Home
- TimeClock
- Accounting
- Prospects
- Contracts
- Mortgages
- Tours
- Packages
- Reservations
- Property Management
  - Rooms
  - Units
  - Inventory Allocation
  - Room Inventory Allocation
  - Spare Room Allocation
  - Quick Check Availability
  - Room Usage
  - In/Out of Service
  - Banking
  - Bulk Bank Wizard
  - Resort Overview
  - OPC-OS Concierge Report
- Maintenance Requests
- Room Matrix
- Rental Pool Limits
- Reports
- Personnel
- Add-Ins
- WorkOrders
- Setup

UserName: ALL

Exchange Comp.: ALL

Status: ALL

Start Date: 1/1/2013

End Date: 8/26/2013

Run By Date Entered: ☐

Contract Number: 8430

ListCreate New

All information in RED is required for initial entry.

First Name: Richard

Last Name: Hill

Type Of Unit: Cottage

Frequency: Biennial

Usage: Red

Usage Year: 2014

Unit Size: 1BD

Exchange Company: II

Membership Number: 2468597

Contract Number: 8430

Status: Pending

Status Date:

Unit Deposited: testAdd

1-105BRemove

Week Deposited: 10

Year Used: 2014

Date Deposited: 3/8/2014

Confirmation Number:

SubmitReset

- Once you have submitted your request, click on the List button again to confirm that your request(s) are complete.

BANK

Welcome Alison Wyatt  
[Log out](#)

- Home
- TimeClock
- Accounting
- Prospects
- Contracts
- Mortgages
- Tours
- Packages
- Reservations
- Property Management
  - Rooms
  - Units
  - Inventory Allocation
  - Room Inventory Allocation
  - Spare Room Allocation
  - Quick Check Availability
  - Room Usage
  - In/Out of Service
  - Banking
  - Bulk Bank Wizard
  - Resort Overview
  - OPC-OS Concierge Report
- Maintenance Requests
- Room Matrix
- Rental Pool Limits
- Reports
- Personnel
- Add-Ins
- WorkOrders
- Setup

UserName: ALL

Exchange Comp.: ALL

Status: ALL

Start Date: 1/1/2013

End Date: 8/26/2013

Run By Date Entered: ☐

Contract Number: 8430

ListCreate New

Printable

Owner	Contract Number	Status	Status Date	Created By	Deposited By	Year Used	Deposit Year	Unit Type	Member Ship Number	Date Deposited	Unit Size	Room Number	Usage	Frequency	Exchange Company	Date Created
Select Hill, Richard	8430	Pending	8/26/2013	A Wyatt		2014	2014	Cottage	2468597	3/8/2014	1BD	1-105B	Red	Biennial	II	8/26/2013 12:51:00 PM

## UPDATING AN EXISTING BANKING REQUEST

You will occasionally need to update an existing banking request, perhaps due to the owner making a change to what they original wanted or because there was a problem with the original request and it was sent back for correction.

1. Go to the Menu and click on the + next to Property Management. This will allow you to see all of the options. Click on the Banking link to bring up the request screen. Enter a Start Date (go back 18 months), End Date (enter today's date), enter your Contract Number and click on the List button. Remember to keep Status as ALL. You will now see all requests made during the timeframe chosen.

UserName:  ALL  
Exchange Comp.:  ALL  
Status:  ALL  
Start Date:  1/1/2013  
End Date:  8/26/2013  
Run By Date Entered:   
Contract Number:  8430

	Owner	ContractNumber	Status	StatusDate	CreatedBy	DepositedBy	YearUsed	DepositYear	UnitType	MemberShipNumber	DateDeposited	UnitSize	RoomNumber	Usage	Frequency	ExchangeCompany	DateCreated
<a href="#">Select</a>	Hill, Richard	8430	Sent back to OS	8/26/2013	AWyatt	AWyatt	2014	2014	Cottage	2468597	3/8/2014	1BD	1-105B	Red	Biennial	II	8/26/2013 12:51:00 PM
<a href="#">Select</a>	Hill, Richard	8430	Sent back to OS	8/26/2013	AWyatt	AWyatt	2014	2014	Cottage	2468597	3/8/2014	1BD	1-105A	Red	Biennial	II	8/26/2013 12:51:00 PM

2. Click on the [Select](#) link to the left of the banking request you wish to modify. This will open up the banking request page. Please note that if a banking request was placed with multiple units tied to it, for example a 3 bedroom unit, multiple lines will be displayed, one for each unit as in the example above.
3. Once you have opened the page, modify the existing by correcting or updating the information as needed. In this case, the request was placed for a 1 bedroom unit, but a 3 bedroom unit was added to the request. Once the request is corrected/updated, click on the Submit button.
4. Once you have submitted your request, click on the List button again to confirm that your request(s) are complete.

## REPORTS

There are various reports in CRMS to help monitor that information is entered correctly in the system. Anyone has access to these reports so that errors can be corrected same day.

### Usage By Day

This report is to be used to verify that the correct unit check in day was added to a usage. For example, all owner usages should be created for 7 days. Thursday to Thursday, Friday to Friday, Saturday to Saturday or Sunday to Sunday which matches the check in days of the units. This report will display what the check in day of the usage is versus the check in day of the unit. Only incorrect assignments will be listed.

Go to Reports on the Menu – Owner Services – Usage By Day

Welcome Alison Wyatt <a href="#">Log out</a>				
<div> <div>Home</div> <div>TimeClock</div> <div>Accounting</div> <div>Prospects</div> <div>Contracts</div> <div>Mortgages</div> <div>Tours</div> <div>Packages</div> <div>Reservations</div> <div>Property Management</div> <div>Reports</div> <div>Accounting</div> <div>Contracts</div> <div>Customer Service</div> <div>Exit</div> <div>Front Desk</div> <div>Human Resources</div> <div>Legal</div> <div>Marketing</div> <div>MIS</div> <div>Owner Services</div> <div>Rentals</div> <div>Reservations</div> </div>		<b>ID</b>	<b>Name</b>	<b>Desc</b>
	<a href="#">Select</a>	148	Allocation Mismatches	Allocation Mismatches
	<a href="#">Select</a>	145	Bank Report	Bank Report
	<a href="#">Select</a>	149	Busch Gardens Invoice	Busch Gardens Invoice
	<a href="#">Select</a>	155	Check By Phone Payments	Check By Phone Payments
	<a href="#">Select</a>	162	Check Ins By Day	Check Ins By Day
	<a href="#">Select</a>	173	Confirmation Letters	Confirmation Letters
	<a href="#">Select</a>	211	Conversions By Anniversary Date	Conversions By Anniversary Date
	<a href="#">Select</a>	163	Fixed Week Owner Report	Fixed Week Owner Report
	<a href="#">Select</a>	177	ORF Report	ORF Report
	<a href="#">Select</a>	164	Out Of Service Rooms	Out Of Service Rooms
	<a href="#">Select</a>	153	Owner Inventory	Owner Inventory
	<a href="#">Select</a>	154	Owner Notebook	Owner Notebook
	<a href="#">Select</a>	150	Reservation Banking	Reservation Banking
	<a href="#">Select</a>	152	Unrented Rental Usages	Unrented Rental Usages
	<a href="#">Select</a>	151	Usage By Day	Usage By Day
	<a href="#">Select</a>	214	Usage Inventory Mismatch	Usage Inventory Does not match Usage Room Type
	<a href="#">Select</a>	166	Usages With MF Balance	Usages With MF Balance
				<b>Path</b>
				AllocationMismatches.aspx
				BankReport.aspx
				imported/BuschGardensInvoice.asp
				imported/PendingCBP.asp
				imported/CheckInsByDay.htm
				ConfirmationLetters.aspx
				conversionsbyanniversarydate.aspx
				imported/fixed_week_owner_report.asp
				ORFReport.aspx
				OutOfService.aspx
				imported/OwnerInventory.asp
				imported/OwnerNotebook.asp
				imported/ReservationWeekBank.asp
				imported/UnrentedRentalUsages.asp
				imported/UsageByDay.htm
				usagemismatches.aspx
				imported/UsageMFBalances.asp

Enter a date range, starting with today's date, thru the last available check in that is allowed to be used and click on Run Report button. Displayed will be all usages where the check in date of the unit does not match the check in date of the usage.



<b>Date Range:</b> 05/27/2013 08/26/2013								
Run Report								
Prospect	Usage Type	Usage Sub Type	Room Number	Room Type	Room Sub Type	In Date	Usage Day	UsageID
Developer, KCP	Exchange		8-100A	2BD	THU	6/9/2013	SUN	<a href="#">318776</a>
Ortiz, Maribel	Exchange	II	12-105A	2BD	SAT	7/11/2013	THU	<a href="#">305846</a>
Clarke, Stephen	Exchange	II	8-102A	2BD	THU	8/11/2013	SUN	<a href="#">308016</a>
McHarg, Richard	Exchange	II	15-100B	1BD-DWN	FRI	8/10/2013	SAT	<a href="#">306054</a>
Henshaw, Harry	Exchange	II	5-302B	1BD	FRI	8/4/2013	SUN	<a href="#">305398</a>
Dickson, Donald	Exchange	II	5-204B	1BD	FRI	8/10/2013	SAT	<a href="#">299700</a>
Bentz, Donald	Exchange	II	10-204A	2BD	FRI	6/2/2013	SUN	<a href="#">305969</a>
		<b>NOTE:</b> THIS IS THE OWNERS 2bedC, II GUEST NEEDS A HANDICAP UNIT>						
Matthews, Lionel	Exchange	II	3-207B	1BD	SUN	5/31/2013	FRI	<a href="#">309052</a>
Walton, Noel	Exchange	II	1-104B	1BD	SAT	6/21/2013	FRI	<a href="#">302222</a>
		<b>NOTE:</b> II guest requested handicapped unit						
Lee, Raymond	Exchange	II	13-114A	2BD	THU	5/31/2013	FRI	<a href="#">305649</a>
Cerrato, Peter	Exchange	II	10-206A	2BD	FRI	6/9/2013	SUN	<a href="#">306297</a>
		<b>NOTE:</b> II guest needed handicapped unit						
Baum, Richard	Exchange	II	13-200A	2BD	THU	6/7/2013	FRI	<a href="#">312350</a>
Lazzaro, Anthony	Exchange	II	15-100B	1BD-DWN	FRI	8/3/2013	SAT	<a href="#">320565</a>
		<b>NOTE:</b> this is the owner 1bdrm-up estate, II guest needed handicapped unit						
Peterson, Elizabeth	Exchange	Non-Owner	12-103B	2BD	SAT	6/13/2013	THU	<a href="#">306242</a>
Tomasello, John	Exchange	RCI	10-200A	2BD	FRI	8/24/2013	SAT	<a href="#">304988</a>
		<b>NOTE:</b> exchange guest needed handicapped unit						
Wean, Max	Exchange	RCI	5-205A	2BD	FRI	6/15/2013	SAT	<a href="#">306370</a>
Milhaven, Richard	Exchange	RCI	5-103B	1BD	FRI	7/14/2013	SUN	<a href="#">303228</a>
Milhaven, Richard	Exchange	RCI	5-103A	2BD	FRI	7/14/2013	SUN	<a href="#">303227</a>
Developer, KCP	Owner		12-109B	2BD	FRI	7/7/2013	SUN	<a href="#">318977</a>
Paden, Patricia	Owner	Non-Owner	16-105B	1BD-DWN	SUN	8/15/2013	THU	<a href="#">316951</a>
Smolda Jr., Joseph	Owner	Non-Owner	12-106A	2BD	SUN	7/31/2013	WED	<a href="#">320465</a>

If there is a valid reason for the unit and usage check in to not match (for example a handicap unit is used for an exchange reservation) then a note should be added to the usage to explain. That note would be displayed on this report and the usage would not have to be verified/changed.

By clicking on the link on the right, the usage will come up in a pop up box. If a usage is created for the wrong day, 2 weeks of inventory is negatively impacted.

### Usages Without Rooms

This report is to be used to make sure that all usages created have a room assigned to them or, if usage is no longer valid, that usage status is updated.

Go to Reports – Reservations – Usages Without Rooms

				Welcome Alison Wyatt	
				<a href="#">Log out</a>	
<ul style="list-style-type: none"> <li>Home</li> <li>TimeClock</li> <li>Accounting</li> <li>Prospects</li> <li>Contracts</li> <li>Mortgages</li> <li>Tours</li> <li>Packages</li> <li>Reservations</li> <li>Property Management</li> <li>Reports <ul style="list-style-type: none"> <li>Accounting</li> <li>Contracts</li> <li>Customer Service</li> <li>Exit</li> <li>Front Desk</li> <li>Human Resources</li> <li>Legal</li> <li>Marketing</li> <li>MIS</li> <li>Owner Services</li> <li>Rentals</li> <li>Reservations</li> <li>Sales</li> </ul> </li> </ul>		<b>ID</b>	<b>Name</b>	<b>Desc</b>	<b>Path</b>
	<a href="#">Select</a>	39	Invalid Reservations With Rooms	Invalid Reservations With Rooms	Invalidreswithroom.aspx
	<a href="#">Select</a>	217	Inventory Available	Inventory Available	InventoryAvailable.aspx
	<a href="#">Select</a>	28	Inventory Control	Inventory Control	inventorycontrol.aspx
	<a href="#">Select</a>	36	Marketing Reservations	Marketing Reservations	MarketingReservations.aspx
	<a href="#">Select</a>	33	Owner Breakdown	Owner Breakdown	OwnerBreakdown.aspx
	<a href="#">Select</a>	37	Pending/Complete Reservations	Pending/Complete Reservations	PendingandCompleteReservations.aspx
	<a href="#">Select</a>	42	Rental Categories	Rental Categories	RentalCategory.aspx
	<a href="#">Select</a>	31	Room Utilization	Room Utilization	RoomUtilization.aspx
	<a href="#">Select</a>	32	Room-Usage Comparison	Room-Usage Comparison	reservationousage.aspx
	<a href="#">Select</a>	35	Type Utilization	Type Utilization	TypeUtilization.aspx
	<a href="#">Select</a>	34	Unassigned Reservations	Unassigned Reservations	UnassignedReservations.aspx
	<a href="#">Select</a>	41	Usage Restrictions	Usage Restrictions	UsageRestrictions.aspx
	<a href="#">Select</a>	30	Usages Without Rooms	Usages Without Rooms	UsagesWithoutRooms.aspx

Enter a date range, starting with today's date, thru the last available check in that is allowed to be used and click on Run Report button. Displayed will be all usages, in a "Used" status that do not have a room tied to them.

[Home](#)
[TimeClock](#)
[Accounting](#)
[Prospects](#)
[Contracts](#)
[Mortgages](#)
[Tours](#)
[Packages](#)
[Reservations](#)
[Property Management](#)
[Reports](#)
[Personnel](#)
[Add-Ins](#)
[WorkOrders](#)
[Setup](#)

Start Date: 
End Date:

	contractid	Status	Type	KCP	UsageID	InDate
<a href="#">Select</a>	281954	Used	Owner	30597	308475	9/21/2013 12:00:00 AM
<a href="#">Select</a>	246874	Used	Owner	6729	309091	8/30/2013 12:00:00 AM
<a href="#">Select</a>	385859	Used	Points	33510	319180	10/24/2013 12:00:00 AM
<a href="#">Select</a>	272968	Used	Owner	23850	320829	12/27/2013 12:00:00 AM
<a href="#">Select</a>	274127	Used	Owner	934R	320925	11/22/2013 12:00:00 AM
<a href="#">Select</a>	274127	Used	Owner	934R	320926	12/15/2013 12:00:00 AM

By clicking on the [Select](#) link on the left next to the usage listed, you will be linked to the contract and usage to correct. Either a room will need to be added or the usage cancelled after reviewing the notes on the account.

## Unassigned Reservations

This report is to be used to make sure that all reservations in a booked status have a room assigned to them or, if reservation is no longer valid, that it is cancelled.

Go to Reports – Reservations – Unassigned Reservations

[Home](#)
[TimeClock](#)
[Accounting](#)
[Prospects](#)
[Contracts](#)
[Mortgages](#)
[Tours](#)
[Packages](#)
[Reservations](#)
[Property Management](#)
[Reports](#)

Welcome Alison Wyatt  
[Log out](#)

	ID	Name	Desc	Path
<a href="#">Select</a>	39	Invalid Reservations With Rooms	Invalid Reservations With Rooms	Invalidreswithroom.aspx
<a href="#">Select</a>	217	Inventory Available	Inventory Available	InventoryAvailable.aspx
<a href="#">Select</a>	28	Inventory Control	Inventory Control	inventorycontrol.aspx
<a href="#">Select</a>	36	Marketing Reservations	Marketing Reservations	MarketingReservations.aspx
<a href="#">Select</a>	33	Owner Breakdown	Owner Breakdown	OwnerBreakdown.aspx
<a href="#">Select</a>	37	Pending/Complete Reservations	Pending/Complete Reservations	PendingandCompleteReservations.aspx
<a href="#">Select</a>	42	Rental Categories	Rental Categories	RentalCategory.aspx
<a href="#">Select</a>	31	Room Utilization	Room Utilization	RoomUtilization.aspx
<a href="#">Select</a>	32	Room-Usage Comparison	Room-Usage Comparison	reservation tousage.aspx
<a href="#">Select</a>	35	Type Utilization	Type Utilization	TypeUtilization.aspx
<a href="#">Select</a>	34	Unassigned Reservations	Unassigned Reservations	UnassignedReservations.aspx
<a href="#">Select</a>	41	Usage Restrictions	Usage Restrictions	UsageRestrictions.aspx
<a href="#">Select</a>	30	Usages Without Rooms	Usages Without Rooms	UsagesWithoutRooms.aspx

Enter a Start Date and End Date. This should be today's date thru the last date that can be booked (end of next calendar year). Type should be Owner and Trial Owner. Sub Type should be All. These are chosen by finding them on the drop down menus and clicking on the Add buttons.

Any future dated reservations with no rooms will be listed.

Home

TimeClock

Accounting

Prospects

Contracts

Mortgages

Tours

Packages

Reservations

Property Management

Reports

Personnel

Add-Ins

WorkOrders

Setup

Start Date: 8/26/2013

End Date: 1/10/2015

Type: Developer Add

Sub Type: Add

Owner: TrialOwner Remove

Owner: Sales, RCI, Non-Owner, Marketing, NALJR, II, ICE, Development, Charity Remove

Run Report

### Owner

Owner				
165746 Thomas Teefey	6/28/2014 -	7/5/2014	7 Nights	7575990674
167307 Richard Lisi	7/4/2014 -	7/11/2014	7 Nights	5164760000
167315 Charles Hudson	7/3/2014 -	7/10/2014	7 Nights	9792423036
167327 Reginald Kruszewski	6/29/2014 -	7/6/2014	7 Nights	7574423317
167425 John Warther	6/14/2014 -	6/21/2014	7 Nights	8144449040
167437 David Powell	7/3/2014 -	7/10/2014	7 Nights	6173082962
168089 Rena Lori Tobias	7/19/2014 -	7/26/2014	7 Nights	7812512524
168137 Terry DeGlandon	7/11/2014 -	7/18/2014	7 Nights	3523699884
168195 Franklin Poarch	8/24/2014 -	8/31/2014	7 Nights	8048763537
170020 E. Spencer Ring Jr.	6/6/2014 -	6/13/2014	7 Nights	5122800127

The reservation ID will be listed on the left along with the owner’s name, phone number and check in dates of the reservation. You will now have to go to the owner’s account and verify why the reservation does not have a unit. If necessary a room should be added or the reservation cancelled based on the notes in the account.

### Unrented Rental Usages

This report is to be used to make sure that all Fixed Week Rental usages have been rented. If not rented, owner must be contacted 30 days prior to check in of usage week.

Go to Reports – Reservations – Unrented Rental Usages

	ID	Name	Desc	Path
Select	148	Allocation Mismatches	Allocation Mismatches	AllocationMismatches.aspx
Select	145	Bank Report	Bank Report	BankReport.aspx
Select	149	Busch Gardens Invoice	Busch Gardens Invoice	imported/BuschGardensInvoice.asp
Select	155	Check By Phone Payments	Check By Phone Payments	imported/PendingCBP.asp
Select	162	Check Ins By Day	Check Ins By Day	imported/CheckInsByDay.htm
Select	173	Confirmation Letters	Confirmation Letters	ConfirmationLetters.aspx
Select	211	Conversions By Anniversary Date	Conversions By Anniversary Date	conversionsbyanniversarydate.aspx
Select	163	Fixed Week Owner Report	Fixed Week Owner Report	imported/fixed_week_owner_report.asp
Select	177	ORF Report	ORF Report	ORFReport.aspx
Select	164	Out Of Service Rooms	Out Of Service Rooms	OutOfService.aspx
Select	153	Owner Inventory	Owner Inventory	imported/OwnerInventory.asp
Select	154	Owner Notebook	Owner Notebook	imported/OwnerNotebook.asp
Select	150	Reservation Banking	Reservation Banking	imported/ReservationWeekBank.asp
Select	152	Unrented Rental Usages	Unrented Rental Usages	imported/UnrentedRentalUsages.asp
Select	151	Usage By Day	Usage By Day	imported/UsageByDay.htm
Select	214	Usage Inventory Mismatch	Usage Inventory Does not match Usage Room Type	usagemismatches.aspx
Select	166	Usages With MF Balance	Usages With MF Balance	imported/UsageMFBalances.asp

Enter a Start Date and End Date. This should cover the date range of check ins that you are verifying. Once you click on the Submit button, all unrented rental usages, no matter the category will be displayed. Make sure only those owners listed under category "Fixed" are being contacted.

Start Date:

End Date:

UsageID	ContractNumber	Owner	InDate	Unit Type	RoomType	Category
301894	15204	Aryan, Saeid	12/21/2013	Townes	2BD	2
317242	A27889	Delos Angeles, Elizabeth	12/21/2013	Cottage	2BD	FIXED
301867	29669	Inman, Mary	12/21/2013	Townes	2BD	2
301246	A20014	Kirk, Caroline	12/21/2013	Estates	2BD	2
301247	A20014	Kirk, Caroline	12/21/2013	Estates	1BD-DWN	2
300968	23622	Robertson, Patrick	12/21/2013	Cottage	2BD	2
301868	16944	Rutti, Brian	12/21/2013	Townes	2BD	2
301888	18594	Schultz, Fred	12/21/2013	Townes	2BD	2
301797	A18190	Vergara Jr., Jaime	12/21/2013	Townes	2BD	2
301861	16279	Zhang, Maolin	12/21/2013	Townes	2BD	2