SHORT-CUT STEP-BY-STEP ENTRY PROCEDURE FOR RESERVATIONS

(For more specific instructions, see the MAGNAware Telemarketing Module Manual)

- Turn on your terminal or open up the Anzio (telnet client) icon.
- Press <ENTER>.
- Type in your login and press <ENTER>.
  (your first name and first initial of last name, all in lower case letters.)
- Type in your password (this will not show on screen) and press <ENTER>.
- A menu will appear with **Telemarketing** as the first selection. Type **T** or press <ENTER> to proceed to the MAIN Telemarketing Menu.
- Select **Inbound Screen** by typing **I** or pressing <ENTER>.
- A **TM Sale Information** screen will appear with a box in the lower right of the screen. This is a "lead search" window. Type in the customer's phone number (no dashes neeeded) and press <ENTER>. (NOTE: You can also search for this customer by typing in their lead number, if known, or their last name and first initial fo their first name on the next line.)
- If this customer's phone number is not in the system, you will see a window appear that says "Phone # not found. Add new lead? NO YES". Select YES by typing **Y** or highlighting YES and pressing <ENTER>.
- A **TM Lead Entry Screen** will appear for you to fill in. Some of the fields on this screen will automatically be filled in for you; some will not need to be filled in; and three will need to be filled in for you to proceed, or save the screen info. These three are: **Lead Source**, **First** and **Last** (customer's first and last names). Always press the <ENTER> key after filling in a field. Press <F2> to save what you've entered. (If you don't know the **Lead Source**, when the cursor is at that field, press <ENTER> and a pop-up list of Lead Sources will appear for you to select from. Highlight the correct one, press <ENTER>, and the selection will automatically appear in the Lead Source field.) Complete as much of this screen as possible/required, and press <F2> to save the information.
- When you save this information a Lead Number for this customer record will appear in a small window on your screen. Press <ENTER> to continue.
- A **TM Lead Edit** screen will appear with a Menu Bar at the bottom of the screen. Type **V** or highlight **Vac-Leg** to enter the Vacation Leg information.
- A window will appear that says **SALE INFORMATION**. Arrow down to the **Welcome Center** field and type in the two-digit numerical code for the resort the customer is going to: 00=Lawrence Welk; 02=Carlsbad Seapointe Resort; 03=Red Wolf; 04=Warner Springs Ranch; 06=Gatlinburg; 07=Embassy Vacation Resorts. Press <F2> to save.
- A window will appear with **ADD NEW VACATION** highlighted. Press <ENTER>.
- A Vacation Leg entry screen will appear. The first field you'll need to fill in is the **Item, which is the resort.** If you don't know the correct resort code for this, type in anything into this field and press <ENTER> to view the pop-up list of codes. You will also need to fill in the # of **Nights**, the **Arrival Date**, the **# of adults** and the **# of children**. Press <F2> to save this information.
- The window which says **ADD NEW VACATION** will appear again. Presss <Esc>. (You've already entered the one and only vacation leg that you need to enter.)
- The **TM Edit Sale Information** screen will appear with the Menu Bar at the bottom of your screen. Type **S** or highlight **Sale** and press <ENTER> to access the **TM Sale Information** screen.
- There is only one field to fill in on this screen: **Sale...:**
  If the sale was made today, enter **T** (for today's date) and press <ENTER>. If the sale was made on a prior date, fill in the correct sale date, and press <ENTER>. Press <F2> to save this information.A small window will appear with **Amount Due.** Press <ENTER>.
- The **VAC CASH RECEIPT** (Vacation Cash Receipt) window will appear on the screen. The only fields you will need to fill in are: **Office;** the **Sale Emp** (employee's number who made this sale); **Method** (method the customer will use to pay for the package. Choices are listed in parenthesis below: CC = Credit Card, CA = Cash, CK = Check, etc.); **CC Name** (exact name that appears on the credit card being used); **CC Acct** (Credit Card number; **Exp** (credit card expiration date - Always uses 4 digits, starting with 0 if the month only has 1 digit.) Press <F2> to save this information.
- A window that says **ADD: RECEIVE MONEY** will appear. You do not need to add any additional money. (This would only be used if more than one credit card is being debited for the Vacation Leg item sold.) Press <Esc> and a small window will appear with **Success.** Press <ENTER> and you will return to the **TM Lead Edit** with the Menu Bar at the bottom.
- To look for or start another customer record, type **Q** or highlight **QUIT** and press <ENTER>.