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User  
Documentation  
for  
MAGNAware  
Up Registration  
and  
Booking

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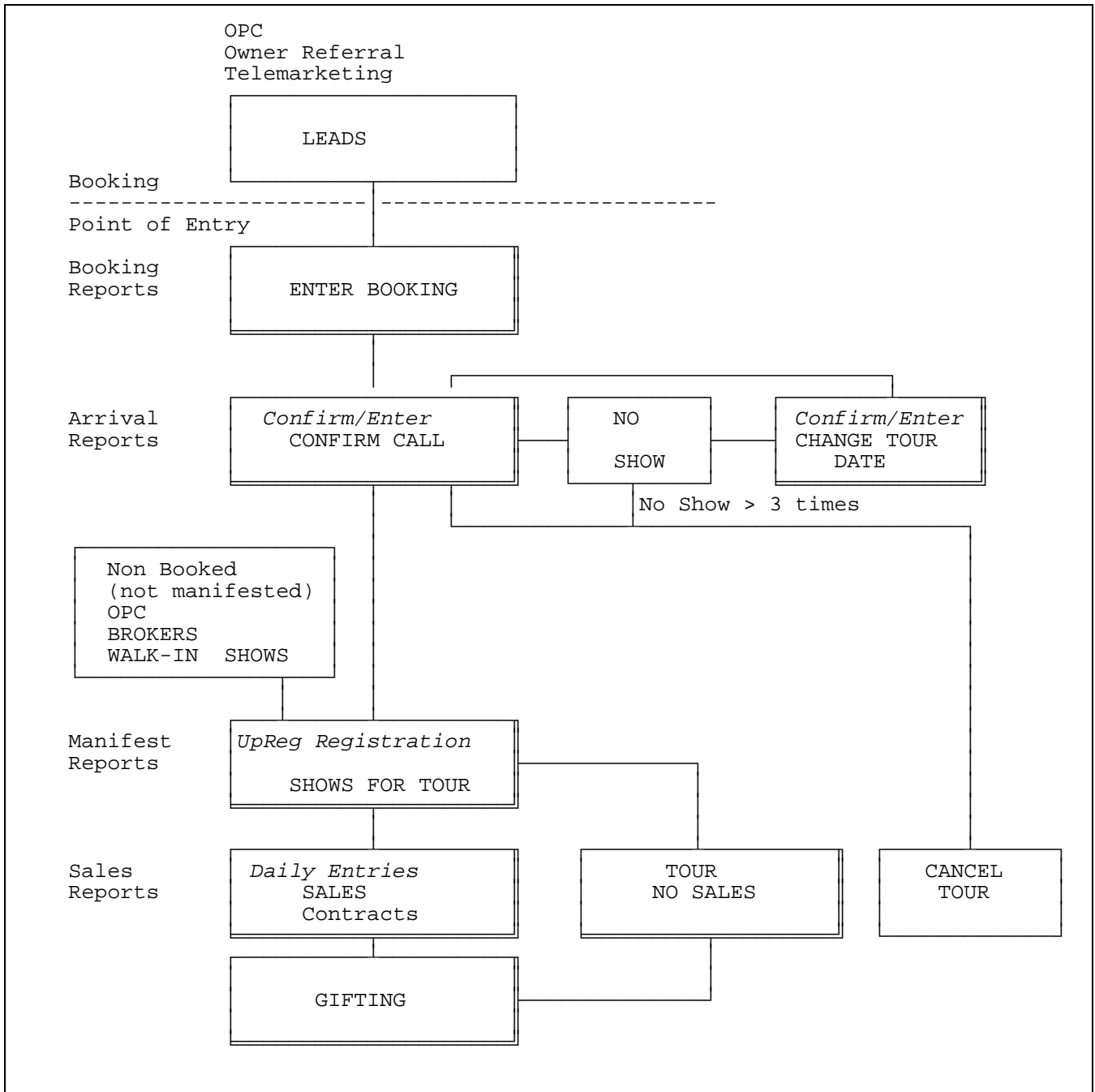
# 1 BOOKING

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# 1.1 PURPOSE AND OUTLINE

To create and help an even flow of tours. To predict tour flow, information must be stored that indicates arrivals, from what source and at what date and time.

MAGNAware booking accomplishes this task using the booking section of up registration.



1 Flowchart of Up Registration using bookings



## 1.2 ADD A NEW BOOKING

You will see the "Opening Files" message. When all files are open, you will be asked to enter in the telephone number of the person(s) scheduling the tour. This number is a unique id, whereby the system will alert you if these people have already toured. You will need to enter in the phone number to proceed with ADDING, CONFIRMING, and REGISTERING any tour!

### 1.2.1 Primary Entry:

If the telephone number matches a number already entered into the system, the screen will beep, alerting the booker that this person has already been entered or toured, then the information for the previously entered number will display. If the person has already toured, the system will not allow you to proceed. This measure is intended to prevent gifting and touring the same prospects, which cost the company considerable amounts of monies. If the person has been booked, but was reset or canceled, you may proceed by pressing <ESC>, abandoning this screen, and selecting "**Confirm/Edit Booking**" from the main "Booking" menu. Please refer to this section within this manual for further instructions.

### 1.2.2 ALTERNATE METHOD:

Another method of entering bookings for tours is utilized where the phone number is not available. With this method simply enter a **completely** blank line in the phone number field. When you save this booking the system will use the manifest number to create a dummy phone number. It is extremely advisable to enter a ZIP code if you are entering a U.S. address. This will produce the area code to be used in the phone number field. It will also automatically insert the state and city. Other countries typically use a Postal Code. If these countries can produce a database of codes then they can be entered into the system.

If the telephone number does not match a number within the system, you will be presented with a fresh "Booking" screen, like the one illustrated on the next page.

```

Book a Tour                ADDING                Sys:10-07-1991 8:16PM patti
Office .....: **                Number :      0
Booking Date..: 10-07-93        Booker  :    124
Booking Time : 08:15PM

Last Name .....: _____        Married or Single.: M
First Name .....: _____        Credit Card .....: _
Street .....: _____            Income in 1000's  : 0
Country .....: _____ Zip: _____ Local Address ....: _____
City .....: _____                Room or Local Ph#: _____
State .....: _____                Tour Date .....:
Phone Number ....: _____          Tour Time .....:
Birth Date .....: _____

Source .....: ALL....
Invite or Vend#..: _____
Solicitor .....: 0
S#2: 0
Prev deposit ....: 0                Comment .....: _____

F2-SAVE   F4 RE-PAINT   F7 UNIX MENU   F9 PREV   F10 NEXT

```

2 Add New Booking Screen

After entering the data for any field, press <ENTER> to continue to the next field. If at any time you would like to cancel the screen, and not save the information, you may do so by pressing the <ESC> key. A message will appear asking, "Would you like to abandon this", press the "Y" key, the information will not be saved, and you will be returned to the main menu.

### 1.2.3 Minimum Information for a booking:

The minimal information for a booking is Booking Date, Clerk, Expected Tour Date and Time, Name, Market Source, solicitor, and qualifying information.

It is preferable to get this additional information as well: Phone Number, Zip/Postal Code, Full address, birth date, income, marital status.

### 1.2.4 Entry fields for booking screen

Office:

Also known as the Sales Line. Enter in the correct office or sales line that this guest will be toured with. Depending on the way your location is set up, you may or may not be able to edit this field, if editing is not allowed, the correct office will automatically display. It is also possible the field may not be accessible and have a value of '\*\*\*' which means it will be allocated when the person arrives for their tour.

**Booking Date:**

**This is the actual date of accepting the tour of your company.** Today's date will be automatically entered for you. If the date is correct, press <ENTER> and continue.

**Booking Time:**

The current time will be automatically entered for you. If the time is correct, press <ENTER>, and continue.

**Number:**

Manifest number. This is automatically assigned by the computer when you save the information with the "F2" key. This will stay with tour when they arrive and be used to write a sales contract as well.

**Booker:**

**This is a REQUIRED field. You will not be able to continue until information has been entered in this field.** Your booking agent number may automatically entered here by the system, depending on the set up for your company.

**Last Name:**

**This is a REQUIRED field. You will not be able to continue until information has been entered in this field.** The system will automatically capitalize the first letter of the last name. In some instances, you will have to manually capitalize, e.g... McDonald. The system will capitalize only after you have pressed a space bar, the very next letter will be in Upper Case.

**First Name:**

**This is a REQUIRED field. You will not be able to continue until information has been entered in this field.** Again, the system will automatically capitalize the first letter of the name(s). You may enter in two first names (as in husband & wife), by typing them in "Husband & Wife", the system will automatically capitalize the second name as well.

**Source:**

**This is a REQUIRED field. You will not be able to continue until information has been entered in this field.** Enter in the "Market Source", that initiated the tour. You may enter in the valid codes for your company's market sources ONLY. If you have entered an incorrect source code, a box will come up with valid sources, select the correct one and press <ENTER> to continue. If the correct market source will not be accepted, it may be a new source, which needs to added to the system, or you may misspell the code. If you do not see the source on the screen listing, contact the person in charge of solicitor payroll, they will have the ability to add this code.

**Solicitor:**

**This field is REQUIRED, the person or entity that gets paid for the contact.**

If this number is your booking, enter in your own employee number. If an error message displays, or the number entered can not be accepted, it will be necessary for you to write down the error message. **This requires an entry into the employee Master program, and must not be terminated, and must have an employee type that corresponds to the field.**

**Married or Single:**

Enter in "M", for married, and "S", for single.

**Credit Card:**

**M=(Master Card), V=(Visa), A=(American Express), and D=(Diners Club).** If you were unable to ascertain the ownership of a credit card, just press <ENTER>, and continue.

**Tour Date:**

**This is the expected arrival date for the tour.** For your convenience, you do not need to enter in the dashes that separate the month-day-year, simply enter in the numbers representing each, and the system will automatically place the dashes in the correct order. You can press the **SCHEd** key here to see the wave list for the day and advance the day with the space bar to pick a date. If this field is blank the **SCHEd** key will select the date for you. If the field has a date the a display of the waves and bookings for the date selected. This will stay on the screen until you press the **SCHEd** key again. Please note that press **T** will give today's date **+1** will be tomorrow's date. **+any number** will give the number of days from to day as a date.

**Tour Time:**

Enter the time of day that you have scheduled the guests to tour the resort. Be sure to enter AM or PM following the time. E.G. 12:00PM. 3 = 3:00AM 3P = 3:00PM 15 = 3:00PM

**Qualified N/Q:**

Use this entry for the status of the invitation, **R=(RESET), and C=(CANCEL).** Most companies will **(C)-cancel** an invitation if the tour has been reset over 3 times. You may place the reason for the action, in the comment field.

**Lead Type:**

Enter in the type of lead for this contact. **B=(Box), C=(Cold Call),**

**Comment:**

You may enter in a brief description of the status of the tour or other information useful in the scheduling, confirming, and registration of this tour. It can also be useful in notifying the **"Registration"** personnel of special circumstances pertaining to this tour.

Once you have entered in all information, press <F2>. You will then be asked, **"Do you wish to save this Y/N?" (Enter <Y>).**



# 1.3 CONFIRM OR EDIT A BOOKING

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## PURPOSE:

- Editing and/or addition of confirmation dates address
  - Change tour date, tour time, addresses or other information on bookings that have not showed
  - Maintenance of resets, and tour cancellations.
- 

You will need the units phone number in order to enter this screen. When entering the phone number it is not necessary to place the dashes, the system will format this for you, however, you will need to space bar out the remaining numbers displayed on the entry field, in order to continue.

It is standard practice, to confirm a scheduled tour a day or two in advance. This is where you may confirm the arrival, or change the tour date and time. Your screen will look similar to the "**Add New Booking**" screen, however, you will only be able to change the highlighted fields, as illustrated below.

Confirm a Tour	EDITING	Sys:10-07-1991	8:16PM patti
Office .....	**	Number :	0
Booking Date..:	10-07-91	Confirm Date:	_____
Booking Time :	08:15PM		
Last Name .....	_____	Married or Single.:	M
First Name .....	_____	Credit Card .....	_
Street .....	_____	Tour Date .....	
City .....	_____	Tour Time .....	
State .....	_____ Zip: _____		
Country .....	_____		
Phone Number ....:	305-646-8892		
Birth Date .....	_____		
Occupation.....:	_____	Qualified (Q/R/C):	__
Source .....	_____	Comment .....	_____
Solicitor .....	0		
F2 SAVE	F4 RE-PAINT	F7 UNIX MENU	F9 PREV F10 NEXT

3 Confirm/Edit Screen

Press <ENTER> to advance to the next field, you may also use the down arrow to move the cursor to the next field. The left arrow will move the cursor to the left, the right arrow moves the cursor to the right, <END> moves the cursor to the end of a field, The up arrow moves the cursor to the previous field.

You will be able to follow the same field information, that is detailed for "**Adding New Booking**",

located in the beginning of this manual. With the exception of a few additional fields that have been added. This screen allows you to place more information about the tour.

PROMPT	R E Q	Description
Occupation	Y	Ideally an occupational code is used in this field. Often a simple description is most useful such as NURSE, MILITARY. This will affect the Evaluation by Occupation report.
Confirmation Date	N	The current date will automatically be entered for you upon accessing this screen. If the date is correct, press <ENTER> and continue. Entry of this date will prevent the booking from appearing on a to be confirmed list.
Qualification status	Y	Use this entry for the status of the invitation, R=(RESET), and C=(CANCEL). Most companies will (C)-cancel an invitation if the tour has been reset over 3 times. You may place the reason for the action, in the comment field.

**Confirmation Date:**

**Qualified:**

Use "Q" for (Qualified), which means the tour is confirmed and the status should be qualified to tour your company. Type a "R" for (Reset), for any tour that rescheduled. This will allow you to track the amount of resets for this tour. Type a "C" for (Cancellation), for a tour that simply will not show, for whatever reason, or for a tour that has been reset over the allowed amount that your companies procedures have specified.

## 0.0.1 Confirming the Tour

When a tour is confirmed to show for the scheduled tour time, you will need to make a confirmation date entry into this portion of the program. Simply enter in the phone number of the person scheduled, the previously entered information will display onto your screen. You may use your <ENTER> key to enter all the way through the fields, or you may use your **UP** arrow key, which will take you directly to the bottom of the screen, use the **UP** arrow again, to get to the "**Qualified**" field. Here you will need to type a "**Q**", to show that the tour has been confirmed, and it is a qualified unit.

## 0.0.2 Resetting a booking

Enter the telephone number of the tour, and the previously entered information will display onto your screen.

Press the **RESCHED** key and the re-booking information will come to be entered. A record will be kept of all previous bookings. A maximum of 3 reschedules are allow.

To change the tour date with no record: Use your **UP** arrow key until you reach the "**Tour Date**" field of the screen. You may change this date to the re-scheduled date. When the date is correct, press <ENTER> to accept. If the tour time has changed, make the corrected adjustment in the field, and press <ENTER> to accept. Continue until you reach the "**Qualified**" field of the screen. Here you will need to type in a "**R**", to let the system know that the tour has been re-scheduled, and again press <ENTER> to accept. You may want to place the amount of resets in the comment field. Press the # key at the comment field, and you will be able to enter in abbreviated details of the number of resets, or any other useful information for this particular tour. When you change the tour date and time, this will also change the "**Arrival**" report, to include the new changes.

## 0.0.3 Cancelling a booking

Enter in the phone number of the tour that is cancelled. Your screen will display the previously entered information for this tour. Use your **UP** arrow until you reach the "**Qualified**" field, and simply press "**C**" to cancel this tour. Press <ENTER> to accept.

As always, press <F2> to save, <ESC> to exit, and <F7> to enter into the "**Unix Menu**". When all information is entered and correct, press <F2> to save it.



# 0.1 PRINTED REPORTS

This menu selection will list valuable information obtained, from the information entered in the previously discussed applications. You will be able to track the activity of the company, market source, and individual solicitor or telemarketer in these reports.

## 0.1.1 BOOKED TOURS LIST

Time Bkd	Booked By	Name	Phone	Tour Date	T Time	Comment
9:40	Brentz, Kathryn	Harris, Brist	407-850-6860	06/01/93	14:01	
9:42	Brentz, Kathryn	Unzueta, Anna	407-851-7246	06/02/93	15:01	
9:45	Brentz, Kathryn	Harris, Abiga	813-850-6860	06/02/93	13:01	
9:47	Brentz, Kathryn	Harris, Frank	407-851-7258	06/01/93	16:01	
9:48	Brentz, Kathryn	Unzueta, Carl	813-676-7524	06/01/93	14:01	
12:15	Brentz, Kathryn	Garland, Fran	407-859-7734	06/03/93	17:01	
Total 05/20/93		6				
GRAND TOTAL		6				

This report will list all units booked for a specific date range, separated by each date. It will display the time of day that the unit was booked, the booker name, the name(s) of the people to tour, their phone number, the date and time that each will be touring. This report is useful to determine the productivity of the day, and activity of the solicitor or telemarketer initiating the calls.

## 0.1.2 Booked Tours List By Source

Run by: patti                      BOOKED TOURS LIST BY SOURCE                      Run: 06/09/93  
Units Booked on 05/20/93 to 05/25/93

MD.....

```
-----  
-----  
TourDate Time        Booked By            Name                            Phone  
Comment  
-----  
-----  
06/01/93 16:01 R Brentz, Kathryn    Harris, Frank                    407-851-7258  
06/02/93 13:01 Q Brentz, Kathryn    Harris, Abigail                  813-850-6860  
06/03/93 17:01 Q Brentz, Kathryn    Garland, Frank                   407-859-7734
```

```
-----  
---- Total: MD.....                            3
```

MS.....

```
-----  
-----  
TourDate Time        Booked By            Name                            Phone  
Comment  
-----  
-----  
06/01/93 14:01 C Brentz, Kathryn    Unzueta, Carlos                  813-676-7524  
06/02/93 15:01 R Brentz, Kathryn    Unzueta, Anna                    407-851-7246
```

```
-----  
---- Total: MS.....                            2
```

VA.....

```
-----  
-----  
TourDate Time        Booked By            Name                            Phone  
Comment  
-----  
-----
```

```
-----
---- Total: VA.....          1
-----
```

```
-----
---- GRAND TOTAL              6
-----
```

Printing the same information as the "**BOOKED UNITS LIST**", this report will separate and sort information by the different market sources, that generated activity for the day. This report will be useful in determining the productivity of each of the market sources, for the initial invitations.

### 0.1.3 Summary of Booked Tours By Source

Run by: patti  
Run: 06/09/93

#### SUMMARY OF BOOKED TOURS BY SOURCE

Units Booked on 05/20/93 to 05/25/93

```
MD..... Total: MD.....          3
MS..... Total: MS.....          2
VA..... Total: VA.....          1
```

```
-----
---- GRAND TOTAL              6
-----
```

This report will list only the totals for a specific time period, that each source has initiated. It will also give a grand total of all sources combined. This is useful for comparisons, and evaluations, without needing the details.

## 0.1.4 Summary of booked Tours by Solicitor

Run by: patti  
Run: 06/09/93

### SUMMARY OF BOOKED TOURS BY SOLICITOR

Units Booked on 05/20/93 to 05/25/93

Brentz, Kathryn

6

-----

----

GRAND TOTAL

6

This will also list the totals, for each individual solicitor, according to the date range specified. A grand total will print at the bottom of the report. This is useful in evaluating the productivity of a particular solicitor, to telemarketer, without needing the details of the tours.

# 0.1.5 Tour Arrival List

Run by: patti

TOUR ARRIVAL LIST Run: 06/09/93  
Units Arriving between 05/20/93 to 05/25/93

TOUR DATE: 05/22/93

```
-----  
-----  
Tour Tme Source Name Survey Phone Number Confirm  
Show  
-----  
-----  
Q 16:00 MD..... Berman, Dawn 10 708-202-9821  
0:00  
----- 1 -- 0 -- 0 --  
-----  
-----  
TOTAL Booked Cxld Reset Confirmed SHOW  
1 1
```

TOUR DATE: 05/25/93

```
-----  
-----  
Tour Tme Source Name Survey Phone Number Confirm  
Show  
-----  
-----  
Q 15:30 MD..... Hyzny, Steve 11 708-485-7734  
0:00  
----- 1 -- 0 -- 0 --  
-----  
-----  
TOTAL Booked Cxld Reset Confirmed SHOW  
1 1
```

You can use this report in different ways, to obtain different views of the information. When printed for a date prior to current date, it will list ALL tours scheduled to arrive on those dates. This is useful to alert the "Registration" department of the scheduled tours for a particular date. Each tour scheduled will display, sorted by the time of day.

When used on the actual date of the tour, it will also signal the tours that showed, for each time period. This report totals the scheduled tours, the total qualified bookings, the total cancellations, resets, confirmations, and total shows.

## 0.1.6 Tour Arrival List by Source

Run by: patti  
06/09/93

TOUR ARRIVAL LIST BY SOURCE

Run:

Units Arriving between 05/20/93 to 05/25/93

Market Source: MD.....

```

-----
--
TourT Cxl/Rst  Name                      Survey Phone Number  Confirm
Show
-----
-----
Tour Date: 05/22/93
Q 16:00      Berman, Dawn          10 708-202-9821
0:00
-----      1 --      0 --      0 ----
Tour Date: 05/25/93
Q 15:30      Hyzny, Steve          11 708-485-7734
0:00
-----      1 --      0 --      0 ----
-----
TOTAL 2 | Cxld      Reset  Booked 2 | Confirmed  SHOW

```

Used in obtaining the same information as the "**Arrival List**", this report will sort the information by particular sources. Another tool used in the evaluations of particular source activity.

## 0.1.7 Arrival Report by lead type

This report signals the totals for each type of lead, sorted by each market source. This report is useful in evaluating success of each lead type. It may also be used for companies that pay different commissions for certain lead types.

## 0.1.8 No Show Report

Run by: patti

NO SHOW REPORT  
Units Due between 05/20/93 to 05/25/93

Run: 06/09/93

TOUR DATE: 05/22/93

```
-----  
-----  
Tour Tme Source Name Survey Phone Number Confirm  
Show  
-----  
-----  
Q 16:00 MD..... Berman, Dawn 10 708-202-9821  
0:00  
----- 1 -- 0 -- 0 --  
-----  
-----  
TOTAL 1
```

TOUR DATE: 05/25/93

```
-----  
-----  
Tour Tme Source Name Survey Phone Number Confirm  
Show  
-----  
-----  
Q 15:30 MD..... Hyzny, Steve 11 708-485-7734  
0:00  
----- 1 -- 0 -- 0 --  
-----  
-----  
TOTAL 1
```

This report will list the same information as the "Arrival" report, yet this only lists the tours scheduled for a particular date that did not show up for the tour. This should be used to determine the ups to contact for resets, and cancellations.