

Marketing Daily Entries Menu

1. Marketing Daily Entries Menu

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=== MARKETING DAILY ENTRIES MENU ===  
  
FD      Enter NEW Full-Down Deal  
PEND   Enter NEW Pending Deal  
EDIT   Edit/View by Contract Number  
LIST   List today's deals  
ALIST  List deals for another day  
CANCEL contracts  
TRANSFER Pending to FD (Add'l Monies)  
Salespersons Maintenance Menu  
Inventory Maintenance Menu  
      Week Availability Listing  
DAILY TOTALS MENU (Ups & Daily Joun)
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1.1. Enter NEW Full-Down Deal

1.2. Enter NEW Pending Deal

TYPING A CONTRACT:

When a purchase proposal is brought in by a T.O. you need to verify that all the information is filled out legibly, i.e. customer name, social security numbers, phone numbers, address, zip code, unit, week and all information on the monies. Verify unit and week is available, check all figures, and verify the money you received matches the amount received today on purchase proposal. A hold check is considered a pending deal.

FIRST:

Determine whether or not it is a full down or a pending contract, use your space bar to hi-light the right entry on the Marketing Daily Entries Menu once hi-lighted press <RETURN>, and a blank contract screen will appear.

AFTER EVERY FIELD PRESS <RETURN> IT WILL THEN TAKE TO YOU THE NEXT FIELD. AT ANYTIME YOU WISH TO LEAVE A MENU OR SCREEN THAT YOU ARE IN JUST PRESS <ESC>, EXCEPT WHILE PRINTING CONTRACTS, THEN JUST PUSH "Q" UNTIL IT ASKS YOU IF YOU WANT TO PRINT CONTRACTS AGAIN, SAY "N" AND THEN <ESC>.

Fields in the contract:

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Other:

This is used only when you are redoing a contract, such as an upgrade or a second week purchase. In this field you would enter the old contract number and hit <RETURN>. At this time the computer will bring up all of the information from the old contract. From here you would put in only the information that you wish to change. See: How To Do An Upgrade.

Market-Source:

Enter in the market source exactly as it shows on the market source list, including the ..., i.e. FOM....., if it is not entered exactly i.e. FOM..., the computer will not accept the market source and will ask you if you would like to enter it. If you say Y it will show you a list of the market sources. Look and see exactly how the computer shows that market source. Q to quit and it will return to the Market-Source field. Enter in the correct source and continue.

Survey-Number:

This number will appear on the printed survey form, i.e. 13-100009, enter in only 100009.

Office-Sales-Line:

Your resort may have one or more offices, or sales lines. Here you should enter in the two (2) digit code for this sale.

Legal-Code:

Enter a number 0 thru 9 that corresponds to the lookup table for your area. Press "?" a question mark to use the scrollable list for this item.

Last-Name:

The first letter should be in upper case, and the rest of the name in lower case, i.e. Smith. If there are two last names such as Smith-Jones, type as shown.

First-Name:

The first letter should be in upper case, and the rest of the name in lower case. Do not leave any blank spaces. If you hit the space bar, " <CTRL> t" will clear the line.

Social-Security:

This must be entered as 388-88-0001 with the dash, in Canada they have a Social Insurance Number which must be entered as 388-344-333. This allows for international customers to use their numbers. This field is used mostly to meet the loan and credit requirement. A cash deal may not really even need this number.

Last-Name#2:

The first letter should be in upper case, and the rest of the name in lower case, i.e. Smith.

First-Name#2:

The first letter should be in upper case, and the rest of the name in lower case.

Social-Security#2:

This must be entered as 388-88-0001 with the dash, in Canada they have a Social Insurance Number which must be as 388-344-333.

Street-Address:

Enter in the number and street name, be sure to enter whether it is a street, avenue, lane, etc. Try to always spell out the word Street, Avenue, etc. i.e. 1234 Bayshore Drive.

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State:

Use only the postal codes for the states, i.e. FL for Florida, in Canada use three (3) digits, i.e. ONT, no period is necessary.

Zip-Code:

Enter in the five digit number i.e., 33064, except in Canada where the zip code is mixed letters and numbers i.e. 3A1 Z1P. Always place a space in-between the sets.

Country:

Do not enter in USA. Only use this field for Canada, U.K., Germany, etc.

Unit:

Enter in the appropriate unit.

Week:

Enter in the appropriate week.

2-Unit:

If there is a second unit and week follow the instructions for the first unit and week.

Terms:

Enter in the appropriate two or three digit number, how many months the mortgage is for i.e. 7 years is 84 months. If the correct number of months is already there, simply <RETURN>.

Interest-Amount:

Enter in the appropriate interest rate, i.e. 17.00 would be entered as 17 and then <RETURN>, 17.75 would be entered as such and then <RETURN>

Sales-Price:

Enter in the appropriate purchase price, do not enter in a \$, just put i.e. 7400 and <RETURN>.

UG-Amount:

This is only used when doing an upgrade. See: Upgrade Procedures.

Downpayment:

Enter in only the amount you have received today, i.e. 740. A check that has a hold on it is not considered good monies today. Treat this as a pending deal.

Add-Down:

Enter in the dollar amount that is due, i.e. 200. This is where you would enter in a hold check.

Add-Due-Date:

Enter in the date that the additional down is due, or the date that a hold check is good, i.e. 02-24-2002.

Mgt.-Protect:

Enter in the appropriate single letter i.e. S single.

Mortgage-Amount:

This is automatically figured, just check this amount against the work sheet.

Date-Written:

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This is automatically placed in by the computer. If you are doing a contract that is not to be signed today, enter in the date that the contract will be signed (post date).

Occ.-Date:

This is the first date that the owner(s) will be using their week. Enter the date i.e., 03-22-89.

Firstpayment-Date:

If this date is not correct, enter in the proper date i.e., 02-22-2002. If it is correct <RETURN>.

CCost:

This is automatically placed by computer, but if it is wrong enter in the correct amount.

Paid-by:

This is automatically placed by the computer, but if it is wrong, enter in the correct single letter, i.e. B (buyer), S (seller).

RCI-or-II:

This is the amount of dues paid. If not correct, please enter in correct amount. If paid by seller leave blank and <RETURN>.

Status:

Automatically done by computer.

Good or Non-Cancelled Status Codes	
N	An "N" status deals was originally meant to be a "New" status. However this quickly became unnecessary because the other fields on the contract tell us the real non status. That is, Date Written, Full-Down, Recorded, Commission Paid and so on. This still retains the N status for historical purposes. To recap an "N" status deal will only be Originally Written as Full-Down contracts and Pending contracts that have now become Full-Down.
F	This status code is really not necessary. It denotes a contract Originally Written as Pending and continues to be pending. Even is a contract had an N status we could tell this status because the Date Written would be filled in and the Full Down Date would be blank. This is in fact the way that reports decide the status of a deal. The "F" status really means it is still a good deal. Refer to the date fields to see what the actual condition of the contract is.
Cancelled Contract Status Codes	
When you cancel a contract you will be presented with a number of cancellation choices. The following codes tell reports and the system the contract is cancelled. It was cancelled on the date "Status Changed"	
R	Rescinded contract. The purchaser cancelled in the recision period and the down payment monies are being refunded. In fact, if the contract down payment monies are refunded out of recision this is the status that should be used as well. Certain reports and commissions are or may be used to act differently based on a contract with an R status. ONLY USE and R status for a recision as defined here.

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C	Cancelled status, out of rescision and the contract down-payment monies are being kept and not returned to the purchaser. Further, it is not a recorded contract and does not require a quit-claim, foreclosure or deed in lieu to return the property to the seller.
Q	Quit Claim deed received and contract is cancelled. This status infers that a closing has been done and that a recorded document was required to cancel the status.
D	Defaulted contract. This would indicate a foreclosure or a forced cancellation of the contract due to a default on the part of the customer. That being the customer did not pay his obligation. This status nor the "Q" status would never be used on a contract that paid off or was a cash-out.
U	Originally the upgrade status. This is the most difficult status to understand. It is also the most important status to use correctly. This status is used to indicated a transfer of inventory. So this status is used to Upgrade, Downgrade, Equal Transfer or a change of ownership to another party as in a resale. A "U" status contract is very interesting. It is CONTRACTUALLY CANCELLED but STATISTICALLY GOOD! That means when the computer looks at the contractual status (who is it deeded to, who owns it) it will be cancelled, but when the computer and reports look at statistical information it is going to count the deal and the volume in the time-period it was written in. For STATS it will count only the new volume in the new contract as indicated by the amount in the UG (Upgrade Volume) field.
X	A deleted contract. Even though the contract is viewable it is never counted in reports of any type. This allows resorts the ability to see what happened to deleted contracts. It allows for a consistency of numbering for internal controls.

Date-Status-Est:

Automatically done by computer, this date is the last date that an accounting function was entered, i.e. pending to good, cancellation, etc.

Salesperson:

Enter in the number corresponding with that salesperson.

Commis'n-Rate:

This is the rate of commission due to the salesperson. If none is due, enter 0.

Date-Comm.-Paid:

This is used by accounting for payroll, do not enter anything.

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Sales-Manager:

Enter in the number corresponding with that of the Manager.

Closer:

Enter in the number corresponding with that of the closing agent, deeder, verification officer, or button up person.

CT:

Enter in single letter i.e. Y or N.

Comment:

Enter in any unusual notations. If you have a hold check, you should note it here.

Full-Down-Date:

Automatically done by computer, do not enter anything. At this time check all information to see that it is correct. If so, use the appropriate function key.

F1: Saves information and return to the Marketing Menu.

F2: Saves information and go to print.

F4: Repaints the screen.

F5: Deletes a contract.

F8: Merge Data to a letter or Form.

PAGE_UP: Allows you to view the previous contract.

PAGE_DOWN: Allows you to view the next contract.

Print-a-contract:

You would press <F2>, it then will show you a deed to read line, i.e. deed to read: his wife. If this is not correct type in the appropriate one, and hit <RETURN>.

It then will show you a salutation, again if not correct type in and hit <RETURN>.

If you have two single people, type in for the label, i.e. SMITH/JONES, John & Mary.

Answer the following questions the same. If you have made a mistake, keep going. At the end of the screen it will ask you if this is correct Y or N. If you have made a mistake answer N and it will start over. Once these are correct, answer Y and you may continue on to print contracts.

A name of a document will appear on the screen and below a small box menu with a list of choices as follows:

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Print documents
Skip documents
Quit documents
Move doc's up
Move doc's down
Eject paper
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If you wish to print the document listed, align the blank document in the printer and hi-light **Print documents** and press <RETURN>. Watch the document as it starts to print to be sure that all is aligned properly. If you made a mistake and wish to print a document again, press Q until you reach a line that asks you "Do you want to print documents again Y or N", press Y and skip until you reach the document you wish to print, then continue on. When you have printed all of the documents you require, say N to print contracts again and you will return to the "Marketing Daily Entries Menu".

Mistakes: If an error was made, you need to re-type the contracts by going into "Edit" on the Marketing Daily Entries Menu. Once you have entered the contract, <RETURN> until you reach the field that you need to correct, make your corrections and <RETURN>. Once all corrections are made, press <F2> to print documents again.

1.3. EDIT: Edit/ View:

With this you have many choices:

1. To look or change anything on a contract.
2. To locate customer by contract number.
3. To locate customer by unit/week.
4. To locate customer by last name.
5. To find available inventory.

Hi-light "Edit" and press <RETURN>, a small box will appear with the choices of:

Contract #
Unit/Week
Last Name

The functions are as follows:

Contract-Number:

If you select this, a contract number will appear. If this is not the correct number, enter in the proper number and <RETURN>.

Unit/Week:

This selection will allow you to look up any contract by unit week. Enter in the unit you wish and then the week, and hit <RETURN>. If the inventory is sold it will bring up that contract. If the unit and week is not sold, it will tell you that the inventory is available.

Last-Name:

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Type in the last name of the customer and <RETURN>. It will then ask you for the first name. If you do not know this, hit the space bar and <RETURN>. If the name that appears is not the one you wanted, use your up or down arrows to scan through the names until you find the one you wanted. Once you have entered into a contract by any one of these ways to make corrections, simply <RETURN> until you reach the field that you wish to change, make your changes and press <F1> to save.

NOTE: You can not change the unit and week once a contract has been entered. If for what ever reason, you need to change the unit and/or week, a new contract will need to be typed. Remember when making changes, <F1> just saves, and <F2> saves and prints.

Available-Inv:

Under "Edit" enter unit/week, enter the unit in question then the week. If the inventory is available, the computer will say available. If it is not, it will show that unit/week's contract on the screen.

NOTE: If you have trouble leaving this field, simply find a unit/week that is sold, enter it and a contract will come up, then <ESC>.

1.4.LIST: Hi-light "list" and <RETURN>. This is used to display on the screen, the sales for the day. It will give a full down total, a pending total, and a combined total.

1.5.ALIST: Hi-light "alist" and <RETURN>. This is used to look at any other given day's sales. Once you have entered this, it will ask for a date. Enter in the day you wish, eg.) 03-03-2002, and press <RETURN>. It will display the sales date that you requested.

1.6.TRANSFER-CONTRACT:

Hi-light transfer contract and <RETURN>. This is used when all or some of the monies is received on a pending contract. Select contract by contract #(number), by unit/week, or by last name. Once you have the contract on the screen, if you look at the bottom of the screen, you will see "do you want to transfer this contract y/n". If you have selected the right contract, answer <y>, (if not, press <n> and start again). It then will say "enter amount received", enter in, i.e \$800.00 as 800 and <RETURN>. If this is not the full amount due it will ask, i.e. "there is still a balance of 200.00 is this o.k. y/n". If correct press <y>, if this is wrong enter <n>, and redo.

If this is the full amount due the computer will tell you that the contract has been transferred. If you have more to transfer, continue on or <ESC> to finish.

1.7.CANCEL CONTRACT

Select contract by contract #, unit/week, or by last name. Once you have the right contract on your screen, if you look at the bottom of the screen, you'll see, "Do you want to cancel Y/N", press <Y>. It will then ask, "are you sure you want to cancel y/n", press <Y>.

A list of selections will appear at the bottom of the screen. "C to CXL, U to Upgrade, R to rescind, X to erase. Enter <Y>, it will cancel the contract and will make all the necessary adjustments for you. If you have more, continue on, or <ESC> to finish. If you are not sure what status is correct put the contract in action notice instead. Refer to the status field in the contract above for the correct status code.

1.8.DAILY-TOTALS-MENU:

You will use this to enter in your totals for the end of the day and to run you daily journals. After entering, this you will find a menu with the options that are listed below:

Salesperson Total
Market Source Total

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Daily Journal

1.8.1. SALESPERSONS TOTAL:

This menu item is not really used any more. The daily posting of tours handles this.

Items on this menu are:

Salespersons-Total:

Will give you a sub-menu with the following selections. At the top of the screen you will see a title of Office.

Date:

This is used for changing the date on the system, so that you may enter view or correct another days total.

Office:

You may enter to change the office or shift if it is not correct at the top of you screen. When you enter, this will give a selection of the offices that you may choose from. Enter in the right office and <RETURN>.

Enter:

Under this you will enter in the salespeople and T.O. or managers tours (ups, or fronts, or backs). A line will appear with three (3) fields to be input. Enter in the salesperson's number and <RETURN>, enter in whether it is a F for front, for salespeople, or B for back for the manager, and <RETURN>. Then enter in how many tours or ups this person has had. Continue on until all fronts and backs are entered. When done <ESC>, it will take you back to the menu.

Numb:

It will give you a list and total of the entries that you have made. Your fronts and back should total or equal out at the end of the day. If you have any corrections to make enter in the salesperson's number you wish to correct and press <RETURN>. <RETURN> to the field that you need to make the correction, make them and <F2> to save, it will ask you if you wish to save, press <y>. To add a salesperson to the list enter in the number you wish to add and <RETURN>, it will say "not found, do you wish to add it y/n" press <y> and enter in whether it is an F or B and the number of ups. Then save.

Report-on-Screen:

This will allow you to view the ups that have been entered with totals. It will ask you "Type of report (for back, <f> for fronts, <a> for all or <ESC>), make your selection. You now will be able to view the ups on the screen, <ESC> when done.

Add-Change:

From here you may add, change, or just look at the employees list in the computer, follow the direction at the bottom of the screen.

Market-Source:

If you wish you can use this to exit to the Market Source up entry screen.

Cal:

Produces a calendar on the screen for last, this, and next month.

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1.8.2. MARKET SOURCE TOTALS:

Items on this menu are:

Date:

This is used for changing the date on the system, so that you may enter or correct another days total.

Office:

You may enter to change the office or shift if it is not correct at the top of your screen. When you enter, this will give a selection of the offices that you may choose from, enter in the right office and <RETURN>.

Enter:

Under this you will enter in the market sources shows and N.Q.'s tours. A line will appear with three (3) fields to be input. Enter in the market source exactly as it appears on your print out from the computer, and <RETURN>, then enter in the net number of tours, <RETURN>, then the number of N.Q., <RETURN>. Continue on until all the market sources are entered. When done, <ESC>, it will take you back to the menu.

Numb:

It will give you a list and total of the entries that you have made. If you have any corrections to make, enter in the market source that you wish to correct and press <RETURN>. <RETURN> to the field that you need to make the correction, make them and <F2> to save. It will ask you if you wish to save, press <y>. To add a market source to the list, enter in the number you wish to add and <RETURN>. It will say "not found, do you wish to add it y/n", press <y> and enter. Then save.

Report:

This will allow you to view market sources that have been entered with totals at the bottom of the screen. <ESC> when done.

Add-Change:

From here you may add, change, or just look at the market source list in the computer, follow the directions at the bottom of the screen.

Salesperson Ups:

If you wish, you can use this to exit to the Market Source Up entry screen.

1.8.3. DAILY-JOURNAL:

This is where you will run your daily journal reports at the end of your shift. Enter this and another menu will appear with the following selections:

Journal
Date
Office

Journal is used to print, to change date press <RETURN> and enter in correct date, and check to see if at the top of your screen the correct office is showing.

1.8.3.1. Printing-Journal:

Make sure that the date and office is correct, and that all of your market sources and salespeople information is entered. Then press <RETURN>. This will bring you to an oblong box, press <RETURN>, and make sure that paper is in the printer. When done <ESC>.

ALWAYS CHECK YOUR JOURNAL AFTER IT HAS PRINTED OUT TO BE SURE THAT NO

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MISTAKES HAVE BEEN MADE, i.e. CONTRACTS ENTERED WRONG, SALESPEOPLE UP'S DON'T MATCH MARKET SOURCE UP'S, ETC.

1.8.3.2. Change the journal date

1.8.3.3. Change the sales office