MANUAL OF OPERATIONS FOR TOUR REGISTRATION

MAGNA

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1 UP (Tour) Registration

Up-Registration is the process on recording the names and addresses of guests who will be touring the resort, as well as assigning the individuals to a particular salesperson who will tour them. The gifting process marks the completion of up-registration.

The computer literally "follows" the guests through the touring process. Reservations may be made for guests over the telephone or in person. If your resort does not perform the telemarketing or "Booking" function, the guests are registered at the front desk. The front desk person does not need to know if the guest has been pre-booked, as he/she will use the phone number of the guest to start registration either way. If a guest has been pre-booked, their record will come up on the screen, otherwise, the information will be entered at walk-in time. The computer automatically marks the guest check-in time at registration. After registration, the guests are usually seated in a waiting area. During this time a survey is printed, which is passed on to the appropriate salesperson who will tour them. The salesperson then proceeds to the waiting area to pick up his guests. At this point the front desk personnel put the guest "On Tour". The computer automatically marks the tour time-out.

When the salesman is finished touring the guests, they proceed to gift check-out. The gift person takes the guests off tour, then records what gifts are given to the guests, making notes as may be necessary to describe special circumstances. The computer automatically charges back appropriate amounts for gifts and/or deposit refunds based on the market source type and market source rules.

1.1 Daily Routine

1.1.1 Starting Your Shift

Updesk Personnel: When you come in, in the morning, you should first check all your computer equipment for proper operation. The terminals should have "Login:" on them after they are turned on and you have hit the enter key. Turn on the printer after making sure it is loaded with paper. Try and print a short report to assure that it is working properly. You do not want to find out that your printer doesn't work when there is a line of guests in front of you! See page 11 if you have a problem with your printer.

Gifting Personnel: If your company has purchased the premium inventory control system you should enter your beginning inventory (select "Start Shift" from the gifting menu) and print a hardcopy list (select "Starting Inventory Log" from the printed reports menu). Make sure that this list represents an accurate representation of your physical inventory.

Contracts Personnel: Make sure you have an appropriate supply of all forms. Check your terminal and printer for proper operation as explained above under updesk personnel. Your supervisor will probably want a hardcopy printed inventory to be run each day when you come in.

1.1.2 Ending the Day

Up desk Personnel: Get the days surveys from gifting and put them in survey number order. Make sure that they are all there, since this is one of 2 (two) source documents, the other being the invitation brought in by the guest. Run a manifest and review it for consistency (Names, State, etc..). Look at the report. You should be familiar with the data. Make sure that the number of surveys agrees with the count at the bottom of the manifest. Be sure to check the N.Q. counts also, since this determines the payment to the OPC's or broker. Look at the salesperson summary at the end. If the sales line only

turns once, one might question why a salesperson went out three times that day. This type of information will be used for salesperson reports which will be run later on. Makes sure the data makes sense, and the statistical reports will make sense when they are run. Look at your reports and question the numbers. Common sense will dictate inconsistencies in the data. Check with your supervisor for other things to check for which are unique to your resort operations.

Contract Personnel: Get all of your contracts together. Make sure that they are put together consistently in some type of pre-arranged order. Run your "Daily Journal" from the Daily Totals menu. This prints all deals for the day, with detail name, address, mortgage amount, etc.. Summaries at the bottom will tell you how many deals were written. Make sure that this agrees with the number of contracts you have at hand. You should bind the contracts with the report prior to handing them in for the day. The daily journal serves as a transmittal summary for your contracts. REVIEW IT CAREFULLY. This contains all the information which will serve for all the reports and summaries which will be run in the future. Addresses will be used for mailings, labels, payment books, etc. Make sure the data is adequate for these purposes. All social security numbers must be entered at time of sale. Federal laws require this, and the information will be used for 1099 mailings in connection with interest expense on the mortgage, as well as broker transmittal information if required in your state. If you force the issue and get all the information while the purchaser is still on site, you will save hours of phone calls and letters later on.

Gift Personnel: If your company has purchased the premium inventory control system the process you use to close your shift is similar to one used by any person handling "cash" or cash type items, such as a supermarket cashier. Count out your remaining gift inventory. Select "End Shift" from the main gifting menu. Enter your remaining inventory at this time. Run the "Gift Summary and Variance Report" from the gift printed reports menu. The variance column should be zero for each gift category. If you received gift replenishment during the day, make sure that your supervisor entered this information, which should show up in the "replenish count" column of that gift. If you have a variance on the gift summary report you must determine its' causes before you leave for the day. Run the recap of shift by survey.

This will show you all gifts given out by survey, for today's surveys. Make sure each survey that should have a gift (qualifying guests only) has gifts assigned to them. Check for unusual quantities (three gifts or one gift to a couple). If you gave out gifts today for surveys from prior days, you must print the "Premium Disbursement Log" and "Premium Transaction Log" which will show all gift transactions for the day. If you still can't reconcile your variance, use your head. Think about what happened during the day which may have been unusual. In almost all instances this will enable you to solve the problem!

1.2 Booking

1.2.1 Purpose

To make a reservation for a couple to tour the resort and help to schedule "waves". Additionally, to keep the sales room full as often as possible, while at the same time, to try and keep the resort from having more guests then there are salespeople to handle them.

Select **BOOKING** from the main menu. You will see the booking menu.

```
UP REGISTRATION MAIN MENU

BOOKING
Register New Up
Tour     Check-In
Gift     Check-out
Screen   Reports
Printed  Reports
Maintenance
Change Journal Date
Unix     Mail, etc.
```

1 Main Tour Desk Menu

1.2.2 Add a New Booking:

You may see the "opening files" message. When all files are open, you will see the following screen:

```
UP REGISTRATION MAIN MENU

*Booking                *
 Register NEW up
 TOUR     Check-In
 GIFT     Check-out
 SCREEN   Reports
 PRINTED  Reports
 Maintenance
 Change journal date
 UNIX     Mail etc..
```

```
      BOOKING MENU

>ADD NEW BOOKING   <
 CONFIRM/EDIT BOOKING
 Printed Reports
```

2 Add “New Booking” menu selection.

Fields	Description
Office:	Enter in the correct office or sales line that this guest will be toured under. If your resort has only one sales line, you will not be able to edit this field, instead, the system will automatically insert this field for you.
Booking Date:	Today’s date has been automatically entered for you.
Booking Time:	Today’s date has been automatically entered for you.
Number:	This is automatically assigned by the computer when you save the information with the "F2" key.
Booker:	Your booking agent number is automatically entered here by the computer.
Tour Time:	Enter the time which you have scheduled the guests to tour the resort here.

The remainder is the same as registration. Please see the discussion later in this chapter for the various fields for which you can enter information.

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

```
Book a Tour                     ADDING          Sys:10-07-1991  8:16PM ron

   Office .......: **                Number :    0
   Booking Date..: 10-07-91          Booker :   124
   Booking  Time : 08:15PM

   Last Name .......: _____________
   First Name ......: ____________________
   Street ..........: _________________________ Maried or Single.: M
   City ............: ____________________      Credit Card .....: _
   State ...........: ___   Zip: _________
   Country .........: ___________               Tour Date .......:
   Phone Number ....: 305-646-8892________      Tour Time .......:
   Birth Date ......:
   Occupation.......: _________

   Source .......: _______
   Solicitor ....:                       0

                                                Comment ......: ____________

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

1.3 TOUR REGISTRATION

```
UP REGISTRATION MAIN MENU

BOOKING
Register New Up
TOUR     CHECK-IN
Gift     Check-out
Screen   Reports
Printed  Reports
Maintenance
Change Journal Date
Unix     Mail, etc.
```

1.3.1Purpose:

Registration is the process of checking in guests that are touring the resort today. Begin by selecting "Register New Up" from the Up Registration main menu. If they have not been pre-booked, you will enter their names, address and other pertinent information. Each blank line on the screen is meant to be filled in. You should try not to leave any fields blank. All fields are important! Certain reports may not be accurate if the proper information is not entered correctly and consistently. Take your time and do it right!

1.4 Register New Up

1.4.1 Phone Number:

Enter the guests home phone number including the area code and all necessary dashes. Everyone has a phone. BE SURE to get it. If the guest does not have a phone, he/she is probably not qualified to tour at the resort! If the guest has been pre-booked, or has previously toured, the screen below is displayed, with much of the information already entered. Otherwise, all fields are blank, as shown below.

```
Registration________Adding_____________Sys:01-18-1991 1:44PM patti

Office..........: **                           Number : _______0
Date............: 01-18-91
Check In Time   : 01:44PM

Last Name.......: _________________          Number in party..: _
First Name......: _________________          # Of Children....: _
Street..........: _________________          Married or Single: _
Country.........: _______Zip:______          Credit Card......: _
City............: _________________          Fly or Drive  D/F: _
State...........: _________________
Phone Number....: ___-___-_____              Local Address....: ________
Birth Date......: _________________
Occupation......: _________________

Source..........: _______
Solicitor.......:
Salesperson.....:                            S#2:  0
Prev. Deposit...: 0                          Qualified (QNB): _
                                             NQ Reason Code : _
                                             Comment........: __________

   F2 SAVE F4 REDRAW F7 UNIX MENU F9 PREV F10 NEXT
```

6 Sample Tour Registration Screen

Office:	Enter in the correct sales line that this guest will be toured under. If your resort has only one sales line, you will not be able to edit this field, instead, the system will automatically insert this field for you.
Date:	This has been automatically entered in for you and cannot be changed.
Time:	This has been automatically entered in for you and cannot be changed.
Last Name:	Enter in the full last name of the guest. You will see that the system will automatically place the uppercase letters where needed.
First Name:	The first letter upper case, and lower case for the remaining. Use the "&" for combining both names on one line. You will find the "&" above the 7 key, (hold down the shift key and press <7>). After the "&" type the wife's name like you did the husband's. e.g. John & Mary.
Street:	Type in the full street address using Avenue, Lane, Etc.
Country:	If the guests are from the United States leave this blank. This is necessary for automatic city and state entry to be performed (see next section). If your guests are foreign, ask the person for the name of their country and enter it here.
ZIP:	Enter in the correct 5 digit zip code. The computer will automatically enter the city and state for you (See more information below).
City:	The computer normally enters this for you after you enter the zip code. Be aware that computer generated city is the appropriate city for the postal service based on the zip code that you entered, even though your guest may say that they live in a different city. This is O.K. If necessary, Type in the full city name, e.g. New York, not NY. Note that foreign countries have "cities" and "states" just like the United States, even though they may be called something else. For example, Rome is a city in the country of Italy, London is a city in the country of United Kingdom, and Toronto is a city in the country of Canada. Make sure that you put the city only in the city field.
Birth:	Date: Enter the proper birth date. The system will automatically display the age of your guest.
Source:	Enter the market source which has provided this guest to you. If you do not enter it exactly, the computer will not accept it and will ask "Do you want to see the list Y/N". Enter <Y> and the available market sources will be displayed.
Solicitor:	Enter the employee number of the solicitor that you intend to pay for this guest. The system will not allow you to put in a "terminated employee", but will beep at you when you enter any number with this status. Check the number again, and if the number is correct, notify your supervisor, as the status of that employee needs to be updated. Note that the only valid employee codes for an employee of this type are "O" (OPC) and "T" (Telesolicitor)
Salesperson:	Enter the number of the salesperson who will tour the guest. Again, the system will NOT allow you to enter a "terminated salesperson". If you have problems, check the number and try again. If the number is correct, notify your supervisor. This item may be changed when you put the guest on tour, and may be left blank if all salespersons are out on tour.
Prev.Deposit:	Enter in the exact amount that was left with the solicitor. You will find the amount marked on the invitation. Only two digits are allowed in this field, e.g. 10.
Married or Single:	Enter the abbreviation code, for the type of marital status. e.g. "M" for married, "S" for single, etc.

Number In Party:	Enter the total number of guests in the party.
Number Of Children:	Enter the number of children present.
C. C.:	Enter "A" For American Express, "D" for Dinners' Club, etc. If they have no credit card enter an "X".
Local Address:	Enter the place that the guest is staying locally. Sometimes it is necessary to abbreviate the location. In this case, make sure that the abbreviation will be recognizable and is consistent.
Qualify:	Enter one of the codes that is listed on your screen. If it is an NQ, (non-qualifying guest), use "N".
NQ Reason Code:	Enter in the code type of NQ reasons. If you're not sure what the codes are, or if you enter a wrong code, the computer will ask you if you would like to see the codes. Press "Y" and <ENTER>, then select where you would like the output. After viewing the codes, enter the code that best describes the situation.
Comments:	If there is anything out of the ordinary, or you have a comment about the salespeople involved, this is where you can add that information. You must choose a letter from the pre-programmed list of comments. You may wish to have a preprinted list available for your convenience.

Once you have entered in all information, press <F2>. You will then be asked,"do you wish to save this Y/N ?" enter <Y>, and you will be asked "Do you want to
print Y/N?" Enter<Y> to print, first being sure paper is in the printer. <RETURN> through second name and phone number, unless the guests are of a nature that you would want to keep this secondary information, which will be printed on the survey. Note that this information will not be saved. When printing is completed you will be taken to the menu. Then go to step 2, listed below, to place the guest on tour. The survey is generally handed to the salesperson who is touring the unit. When the tour is finished, and the unit has seen the TO, the survey sheet will be handed back in, either for gifting, status re-evaluation or to process a contract.

If you have a problem printing and the survey is not able to be used, you will have to re-print it. To do this, go to screen reports and select REPRINT Survey.
Special note regarding printer usage:
Special care must be taken if your printer is attached directly to your terminal, as most printers are in the up-registration area. Note that while a document is being printed, you will not be able to make any entries at your keyboard. You may not notice this, because the printing of the survey takes only a second or two. Do not continue to hit keys if you get no response at your keyboard, they will all come back to haunt you when the print job is finished! Also, your terminal will appear to "Lock up" if you try and print and:

a)There is no paper in the printer
b)The printer is not turned on
c)The cover is not fully down on the printer
d)The printer is not "on line".
e)The top to the printer is not locked down, which may occur after you put

continuous form paper in the printer.
f)If you have two terminals in the up-registration area, note that the one connected to the printer must be turned on and someone logged on in order for that printer to work.

Check these things if you have problems while trying to print!

1.5 TOUR Check - In

```
UP REGISTRATION MAIN MENU

BOOKING
Register New Up
TOUR     CHECK-IN
Gift     Check-out
Screen   Reports
Printed  Reports
Maintenance
Change Journal Date
Unix     Mail, etc.
```

1.5.1 Purpose

Placing a guest on tour segregates those guests on tour from those who are not. This enables someone to determine guests waiting in the lobby with out actually being there. Additionally, waiting times can be calculated to determine if guests wait to long, or not long enough. Additionally, tour times can be calculated, in order to determine if a salesperson is "spinning" his tour, or spending too much time with a guest. Hi-light tour and hit <ENTER>. A list of survey numbers and names will appear. Select the survey number or last name that is to be placed on tour and press <ENTER>.

OFFICE:	Enter in the office in which you are located. It is probably already correct. Press <ENTER>.
SALESPERSON:	Enter in the number of the salesperson who is touring the guest. If there is a salesperson's number already there, and it is correct, press "F2" to save this information.

1.6 GIFT Check-out

```
        GIFT MENU
---------------------------
Gift  Check-out
START SHIFT
END SHIFT
Printed Reports
Unix mail, etc..
```

```
UP REGISTRATION MAIN MENU
---------------------------
BOOKING
Register New Up
TOUR     CHECK-IN
Gift     Check-out
Screen   Reports
Printed  Reports
Maintenance
Change Journal Date
Unix     Mail, etc.
```

1.6.1 Purpose

This is the final phase of touring a guest. When the tour is over, the salesperson usually escorts the guest to gifting. You will usually need to ask about the gift which they would like. If you are out of that gift, they can return the next day to be gifted, however, you still need to complete at least the first portion of the gift screen, in order to take them off tour. This completes the internal computer generated time entries necessary to calculate tour-times for salespeople. Hi-light GIFT Check-out and press <ENTER>. You will be requested to enter your shift. Enter AM or PM and press enter. You will also be required to have a valid employee id. See your supervisor if you get an error message to this effect. The first screen which you will see contains a list of all guests on tour. Enter the guest name or survey number of the couple you wish to gift. The following gifting screen will be displayed.

```
Check-Out and Premiums          EDITING          Sys:10-07-1991  8:17PM   n

 Number ....:      1420        Source ....: Shift: __
People ....: Stransky_____    Ron_________________

Solicitor..:                              0 Check-In ..:
Salesperson: Demeritt, Michelle Ly  123 On-tour ...: 01:26PM
TO (SlsMgr): ___0                         0 Off-tour ..:
                                            Contract#:  0

Amnt. Left with Solicitor:    0.00      Charge Back OPC:    0.00
Deposit (+) or Refund (-):    0.00      Comment: _______________

 | PREM |  DESC                  |  QTY    |    ID        |  PRICE  |CONV?|
1| DD___| Disney Dollar______    |  ___1   | 12345678___  |  _____35|  N

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

10 Sample Gifting Screen

The screen is divided in two sections. The upper half of the screen has the registration information: couples name, solicitor name, check-in time, etc.

TO:	Enter the "TO" (Back) on the deal, if there is one. (Note: TO's are also called "Backs", or Sales managers, and represent the second salesperson on the deal.).
OFF-TOUR TIME:	You do not have access to this field.
DEPOSIT or REFUND:	If you are returning a deposit left with the solicitor, enter that amount here with a "-" in front of it. (e.g. -10). If you are receiving money from the guest, enter that amount here.
CHARGE BACK OPC:	Enter an amount here if you wish to manually calculate the solicitor chargeback. If the solicitor is a broker, this will be updated after you save gift information in the lower half of the screen or if this is an NQ gifting.
COMMENT:	You must first enter a pound sign (#) prior to entering a BRIEF comment.

Hit the F2 key when you have finished entering all items on the screen. You will then be placed in the bottom half of the screen. If you wish to make changes to the top half, you must first exit (escape key), then come back around to the gifting menu again. The next step is to enter the gifts which you are giving out.

PREM:	Enter the code for the gift type and press <ENTER>. The cursor will advance to the next field.
DESC:	The Description is automatically entered for you.
QUANTITY:	Enter the quantity and press <ENTER>. 0 is not an acceptable quantity. You can use a negative amount if a gift is returned to you at a later date.
ID:	Enter the ID of the item disbursed, if directed to do so by your supervisor. For tickets, this will be the serial number of tickets disbursed.
PRICE:	The price is calculated for you. Change it only if you know that it is incorrect.
CONV:	The last field to fill out is the "convert" field. Enter a "Y" here if you have converted the guest from the original gift to a lesser cost gift. If the gift is given because a sale has been made, enter "S". IF you enter an "S", the solicitor will not be charged back for this gift, regardless of other circumstances.

Press F2 to save when you are done. You will see the message "Solicitor Has been charged back $XX if the solicitor is a "Broker" as indicated by a "B" in the "employee type" field in the employee database. The chargeback will include the amount of the gift less any deposit left with the solicitor which was not refunded at time of tour.

1.6.2 Start Shift

```
GIFT MENU

Gift  Check-out
START SHIFT
END SHIFT
Printed Reports
Unix mail, etc..
```

Select "Start Shift" from the gifting main menu. Press enter for today’s journal date. Enter your shift

(AM or PM) and location, if necessary. Your employee number and name will be entered automatically. Press F2 to save this information. You can then enter each gift quantity, one gift type at a time. Begin by entering the gift code. The description will be entered automatically. Next enter the quantity on hand and then an id code (ticket number range) if applicable. Use the down arrow key to go on to the next gift. Press F2 to save when you are done entering all the gift quantities. Hit the escape key when done to exit. If you discover that you made an error, select start shift again. Using the arrow keys, go to the line of the error and Re-enter gift quantity. Pres F2 to save when done. pressing the

1.6.3 End Shift

Follow the same procedures for entering your ending gift quantities as for your starting gift quantities.

1.6.4 Printed Reports

```
        GIFT MENU
Gift  Check-out
START SHIFT
END SHIFT
Printed Reports
Unix mail, etc..
```

```
      GIFT PRINTED REPORTS
 Gift Summary and Variance Reports
 Premium Disbursement Log
 Premium Transaction Log
 Starting Inventory Log
 Recap of Shift by Survey
```

The gift reports are run for one day only, even though they can be run for any day desired by entering the appropriate date when asked. Be sure to run one of each report so you will understand the different views in which the data that you have entered can be viewed.

1.7 SCREEN Reports:

```
UP REGISTRATION MAIN MENU

BOOKING
Register New Up
TOUR     CHECK-IN
Gift     Check-out
Screen   Reports
Printed  Reports
Maintenance
Change Journal Date
Unix     Mail, etc.
```

```
   MANIFEST SCREEN REPORTS

Here        Who's Here
Waiting     Who's Waiting
On-Tour     Who's on tour
Toured      Who's toured
Summary     Recap of tours
Reprint     Survey sheets
List        List today's deals
Print       Print today's deals
AList       Another day's deals
Employee's  SP,TO,SOL
CHANGE      Journal Date
```

1.7.1 Purpose

This is used to view various types of input information on screen. The survey list will be for the current day only. Reprint is used to print another copy of a survey that is already entered. If you wish to print a survey for another date, talk to your supervisor. Most screens update as information changes. For instance, if a new person goes on tour, and you are viewing the on tour screen, the screen will be "re-painted", with the new guest added to the list.

1.7.2 HERE

Listing by market source, this is used to view all surveys for the day. It will list each in numerical order, with the market source, registration time and the name and city/state of the guest. NQ's will blink. Sales will appear in reverse video.

1.7.3 WAITING
This is a list of guests on tour, with the registration time and tour time filled in. Useful in determining how many people are waiting for salespeople. NQ's are not included (N/A). If a salesperson is assigned to the guest he will be listed.

1.7.4 ON-TOUR
NQ's are not included (N/A). The salesperson who has been assigned to the guest will also be listed.

1.7.5 TOURED
This is used to see who has finished touring. NQ's are not shown, (N/A). Sales are in reverse video. The salesperson who has been assigned to the guest will also be listed.

1.7.6 SUMMARY
This will give you a summary of all tours for current date, i.e. net total, number of N.Q.'s, and bolts, (walkouts). Sales and closing percentage are included.

1.7.7 REPRINT
If you need to reprint any survey enter this field, and select the NUMBER you need, enter this number and press <ENTER> , continue to <ENTER> through the second name and phone number, unless the guests are of a nature that you would want to keep this secondary information, which will be printed on the survey. Note that this information will not be saved.

1.7.8 LIST
This will list all of the deals written for current date to the screen.

1.7.9 PRINT
This will print today's deals to your defaulted printer.

1.7.10 ALIST
A summary of all sales lines, how many guests and how many sales per line.

1.7.11 EMPLOYEE'S
Hi-light this and press <ENTER>, a list of all active people will be displayed on screen.

1.7.12 CHANGE JDATE
This is restricted to certain users it is used to change the active journal date on many reports.

1.8 PRINTED REPORTS

```
UP REGISTRATION MAIN MENU

BOOKING
Register New Up
TOUR     CHECK-IN
Gift     Check-out
Screen   Reports
Printed  Reports
Maintenance
Change Journal Date
Unix     Mail, etc.
```

```
UP REGISTRATION PRINTED REPORTS

Manifest
NQ Report All Lines
New Manifest
OPC Manifest
OPC Manifest w/page break
Solicitors Performance Reports
Evaluation Reports Menu
Salesperson's Menu
Market Source Ups
Line Summary Report
Alpha List
Employee's SP, TO,SOL
```

1.8.1 MANIFEST

This report is in a single line format and summarizes all the guests registered for a particular day, with the solicitor's, fronts and the backs. It will also add all the totals, with the time in and out of each guest registered. You will be asked, "ENTER THE OFFICE TO BE USED". Enter the office desired then press <RETURN>, or press "**" to combine all sales lines. You will also be asked for the group, via a pop-up selection screen. The "Send Report To Menu" will appear. Make your selection and press <RETURN>.

1.8.2 NQ REPORT

Used to list all the NQ's, (non-qualified guests), by particular sales lines. The information includes the solicitor, reason, and the time of day. When you select this you will then be asked to "ENTER

THE JOURNAL DATE TO BE USED". Enter the date desired and press <RETURN>. The "Send Report To Menu" will appear. Make your selection to complete the report selection.

1.8.3 DETAILED MANIFEST

This report will summarize all the guests registered for a particular day, with all the solicitors, fronts and the TO'S. It will also add the totals, and the time in and out on each guest and will print in a box style format. When you select this you will be required to "ENTER THE JOURNAL DATE" to be used for this report. Enter the date needed. The "Send Report To Menu" will appear. Enter the selection that is desired to complete the report selection.

1.8.4 OPC MANIFEST

For use in obtaining information about solicitors. When you select this you will be required to "ENTER THE JOURNAL DATE". Enter the date desired for the report, and press <RETURN>. The "Send Report To Menu" will appear. Make the selection that is desired . This report will list tours grouped by solicitor.

1.8.5 OPC MANIFEST W/PAGE BREAK

Same as above, except that each solicitor starts on a new page, appropriate for distribution. You will be required to "ENTER THE JOURNAL DATE". Enter the desired date for the report and press <RETURN>. The "Send Report To Menu" will appear. Make the selection that is desired to complete the report selection.

1.8.6 SOLICITOR'S PERFORMANCE REPORT

This report will summarize the performance of each solicitor with the guests, cancellations, sales, net, volume, and ratings, with the totals at the end of the report. Unlike the OPC Manifest, it allows you to enter a date range as opposed to one journal date. When you select this you will be asked to enter the "DATE TO START", enter the date desired and press <RETURN>. Next enter the "DATE TO END" and press <RETURN>. The "Send Report To Menu" will appear. Make the selection that is desired. Your screen will display the message, "PROCESSING INFORMATION". The last message to appear on your screen will be, "TALLYING RESULTS". When the report is printing your screen will be returned to the reports menu.

1.8.7 SALES GENERATION REPORT #1

In single line format, this will list the activity by grouping.

1.8.8SALES GENERATION #2

Basically the same report as above, with different groupings. This is used for listing all locations and the activity of each, grouped by their location group codes. They print in summary the amount of qualified, not-qualified units, with the sale percentages, closing percentages, volume, and volume per unit for each individual location.

1.8.9 EVALUATION REPORTS

```
UP REGISTRATION MAIN MENU

BOOKING
Register New Up
TOUR     CHECK-IN
Gift     Check-out
Screen   Reports
Printed  Reports
Maintenance
Change Journal Date
Unix     Mail, etc.
```

```
UP REGISTRATION PRINTED REPORTS

Manifest
NQ Report All Lines
New Manifest
OPC Manifest
OPC Manifest w/page break
Solicitors Performance Reports
Evaluation Reports Menu
Salesperson’s Menu
Market Source Ups
Line Summary Report
Alpha List
Employee’s SP, TO,SOL
```

```
EVALUATION REPORTS

State Report
Zip Code Report
Age Report
Transportation Rpt
```

These reports are mainly used in the administration and marketing offices. They are programmed to evaluate the percentages and volume of qualified and non-qualified guests under the specifications of the individual criteria and the time frame that is entered. These reports can only be as accurate as the information that is entered at the time of registration. Note that certain reports rely on data being properly and consistently entered. If this is not the case, the reported results may not be what you expect.

1.8.10 EVAL BY STATE

Useful in determining how many qualified units come from which states. You will be requested for a "DATE TO START". Enter the date desired and press <RETURN>. Then you will be required to enter the "DATE TO END". Enter the date desired and press <RETURN> again. You will then see the message, "PROCESSING INFORMATION". When the processing is finished, your screen will display the message, "TALLYING RESULTS". The report will automatically print to your default printer. This report summarizes all the guests, sales, cxls, and volume by the states listed in the dates that were specified.

1.8.11 EVAL. BY ZIP

In a similar format as the above listed report, this is useful in the determination of how many qualified units come from which zip codes. This report will summarize all the guests, sales, cxls, and the volume by certain zip codes, according to the dates that are specified.

1.8.12 EVAL. BY AGE

In the similar format as the above listed evaluation reports, this is useful in the determination of which ages are most likely to meet the qualifications of your company. This report will summarize all the guests, sales, cxls, and the volume by certain ages, according to the dates that are specified.

1.8.13 TRANSPORTATION EVAL. REPORT

When you wish to evaluate which types of transportation is mostly used by your guests for a specific time period. Follow the same instructions that was observed in the above evaluation reports.

1.8.14 MARITAL STATUS

Used to determine the majority of qualified and non-qualified units or guests and their marital status. Printed in same type of format as the above mentioned evaluation reports. It will also list the percentages and volume totals.

1.8.15 REGISTRATION TIME

Known as the "Check Guest Report", this will list the exact times that the updesk is registering units, and the times that they are idle, this report will tell your manager how busy your department was during a specific time period. Listing totals of units, and the percentages of qualified versus not-qualified.

1.8.16 TOUR TIME

Another type of "Check Guest Report", this will print the exact times that the unit or guest came in for registration, and the exact time that they were placed on tour. Useful in the determination of up flow and timing of generated sales.
LOCAL ADDRESS: Listing the solicitor locations, this will list the activity of qualified, non-qualified, gross sales, volume, closed deals, volume per local address, and the "NQ" percentage of each location. Useful only if standard abbreviations are used.

1.8.17 EDUCATION

Used in the determination of what educational backgrounds have purchased. This report is useful ONLY if the information is entered at the time of registration.

1.8.18 SALESPERSON’S MENU

Any reports or extra activity that has to be done with the salespeople in mind is found in this menu.

```
 U  REGISTRATION PRINTED REPORTS

Manifest
NQ Report All Lines
New Manifest
OPC Manifest
OPC Manifest w/page break
Solicitors Performance Reports
Evaluation Reports Menu
Salesperson’s Menu
Market Source Ups
Line Summary Report
Alpha List
Employee’s SP, TO,SOL
```

```
    SALESPERSON’S MENU

Total Salesperson’s Report
UPS Entry
Summary Information
TO Summary Information
Post UPS
```

1.8.19 TOTAL SALESPERSON’S REPORT

Please see Marketing reports section for a description of this report.

1.8.20 UPS ENTRY/EDIT

1.8.21 PURPOSE

This option is rarely used. Use it when you must make manual adjustments to UPS totals. Note that if you have a salesperson who’s totals go from a positive quantity to zero, you must manually delete his ups, since the system WILL ONLY REPOST A QUANTITY WHICH IS POSITIVE (greater that zero). When you highlight this it will bring you to a section where you are asked to enter the office to be used. Make your selection, then press <RETURN>. It will then bring you to the following menu.

```
Evaluation Reports Menu
Salesperson's Menu
Market Source Ups
Line Summary Report
Alpha List
Employee's SP, TO,SOL
```

```
SALESPERSON'S MENU

Total Salesperson's Report
UPS Entry
Summary Information
TO Summary Information
Post UPS
```

```
SALESPEOPLE'S UPS ENTRY/EDIT

Date - Change Journal Date
Office - Change Sales Office
Enter - Ups
Numb - Edit by number
Report on screen
Summary Information
TO Summary Information
View Salespeople's names & #s
Market Source UPS entry
Cal - last,this,&next month
```

1.8.22 CHANGE JOURNAL DATE

This is used if you want to view information for a different day than today. Simply enter the date for which you want to view and press <ENTER>.

1.8.23 CHANGE SALES OFFICE

This will allow you to change the sales office that you previously entered, when you entered this menu.

1.8.24 ENTER UPS

This will allow you to enter a guest quantity for a salesperson for a day for which the computer was not available to enter live data. Each time you press <RETURN> it will list a salesperson's number, their name, their employment code, and the amount of guests to their credit. Press <RETURN> again and it will list another salesperson's number and the same information as above.

1.8.25 EDIT BY NUMBER

This will allow you to edit information already entered by entering a particular salesperson's number. You will be asked to enter a number from the list of salesperson's that is listed, or to enter the number to change or add, or you can press <R> for the report. The "F5" key is used to delete an entry for a particular salesperson.

1.8.26 REPORT ON SCREEN

You will be asked the "TYPE OF REPORT" (<B>ACKS, <F>RONTS, <A>LL, OR <ESC>). Enter the selection you would like and press <RETURN>. The salesperson's names and their numbers will be listed according to your specifications. Then you will be requested "THE TYPE OF REPORT". You may change the type of report again, or <ESC> to escape. When you hit <ESC>, you will be brought back to the above menu.

1.8.27 SUMMARY INFORMATION

You will be asked "DATE TO START". Enter the date that you need, then press <RETURN>. Then you will be asked "DATE TO END". Enter the date that you need and again press <RETURN>. This report will summarize the number of tours by salesperson, by line.

1.8.28 TO SUMMARY INFORMATION

You will be asked "DATE TO START". Enter the date that you want your report to begin, then press <RETURN>. You will be asked the "DATE TO END". Enter the date that you want the report to end, then press <RETURN>. The report will begin to process the information. This will summarize the number of tours by TO (Back) by line.

1.8.29 VIEW SALESPEOPLE'S NAME & #S

This will give you a list of ALL active or terminated salespeople with their numbers. You will also be given a choice of four options,"QUIT, NEXT SCREEN, PRINT, AND OPTIONS". If you would like to return to the previous menu, press <QUIT>. If you need to see more of the list of salespeople, press <NEXT SCREEN>. If you need to print this list of salespeople, press <PRINT>. If you would like your report to print in a numerical order, or an alphabetized order, then press <OPTIONS>. Make the selection that is needed, then press <RETURN>. When you hit <RETURN>, it will ask you the list type, "FRONTS, BACKS, OPC'S, TELEMKTERS, EVERYTHING ELSE, AND ALL". Make the selection that is needed, then press <RETURN>. The salespeople will be listed according to your specifications.

1.8.30 MARKET SOURCE UPS ENTRY

This will allow you to post ups to a specific market source, much the same as the "Ups Entry Menu", with the posting directed to the market source, as opposed to the salespeople.

1.8.31 CAL - THIS, NEXT, & LAST MONTHS

This will display the last, this and next month's calendar.

1.8.32 TO SUMMARY INFORMATION

You will be asked to enter the "DATE TO START". Enter the desired date, then press <RETURN>. You are required to enter the "DATE TO END". Enter the date desired and press <RETURN>. Then you will see the "SEND REPORT TO" menu. Enter the desired selection. The report will begin to process information. This report will summarize the current status, ratings, cancellations, and the sales of all salespeople, including the solicitors, fronts and TO's.

POST UPS: You will be asked to enter the "DATE TO START". Enter the desired date that you would like the report to begin, then press <RETURN>. You will then be asked to enter the "DATE TO END". Enter the date that you would like the report to finish and press <RETURN>. Then you will see the "SEND REPORT TO" menu. Enter the desired selection. The report will begin to process information. Your screen will display the message "posting the information" for the dates that you specified. When the report is finished with processing, you will automatically be returned to the menu. This report will post all the guests to each salesperson's credit. THIS PROCESS SHOULD BE PERFORMED AND PROOFED EVERY DAY PRIOR TO CLOSING.

```
 UP REGISTRATION PRINTED REPORTS

Manifest
NQ Report All Lines
New Manifest
OPC Manifest
OPC Manifest w/page break
Solicitors Performance Re orts
Evaluation Reports Menu
Salesperson's Menu
Market Source Ups
Line Summary Report
Alpha List
Employee's SP, TO,SOL
```

1.8.33 MARKET SOURCE UPS

You will be asked to enter the, "OFFICE TO BE USED", for this report. Enter the office that is desired, then press <RETURN>. You will be transferred to the menu of "MARKET SOURCE

UPS/ENTRY", that was reviewed earlier in this manual. Follow the same procedures as illustrated before, according to the information that is needed for this report.

1.8.34 LINE SUMMARY REPORT

You will be required to enter the "DATE TO START". Enter the date that you want the report to begin, then press <RETURN>. You will be required to enter the "DATE TO END". Enter the date that you want the report to finish, then press <RETURN>. The "Send Report To" menu will appear. Enter your selection and press <RETURN>. Your screen will display the message, "PREPARING REPORT". This report will list the sales lines, the qualified guests, the NQ's, (non-qualified guests), the gross sales, the volume, cancellations, and the ratings and percentages, with the totals at the bottom of the report, for the dates that were specified in a manifest view format.

1.8.35 ALPHA LIST

You will need to enter the "DATE TO START". Enter the date that you want the report to begin, then press <RETURN>. Then enter the desired "DATE TO END". Enter the date that you want the report to finish, then again press <RETURN>. You will be presented with the "SEND REPORT TO" menu. Make the selection that is desired. A message will appear on your screen indicating that the computer is, "PREPARING REPORT". This will give you an alphabetical listing of the units, or the guests, with the survey number, the state they are from, the date that they were here, and the solicitor's name for each guest.

1.8.36 EMPLOYEE'S SP, TO, SOL

You will be presented with the "SEND REPORT TO" menu. Make the selection that you need. Your screen will display the message, "PREPARING TO PRINT". When the report is ready, you will be returned to the reports menu. This will print all the employee's in an "NUMERIC

1.8.37 TYPE-A

Listing first the employee id number, then the names of the employee's, whether they are a," Front, Back, Clerk, or SOLICITOR, with the sales line that each salesperson uses. The clerks will not have a sales line beside their employee code.

1.8.38 MAINTENANCE

Purpose: Maintenance is used to make corrections or additions to specific surveys, under the option that you select. Again, this can ONLY be accessed for the current date, if you need to make a correction for another date, contact your supervisor. When you highlight and enter this, you will be taken to the following menu.

```
    MAINTENANCE
-----------------
 Registration
 Tour
```

NOTE* If you have made a double entry into the manifest and need to delete a registration, contact your supervisor, who has the ability to access an upregistration administration menu to make the correction. He/she will go into "manifest all fields" and enter the number you need, press <RETURN>, once you have the right selection, press <F5>, your screen will display the message, "do you want to delete y/n", press <y>, and this item will not appear on the manifest.

1.8.39 REGISTRATION

Highlight this and press <ENTER>, you will be asked to enter the manifest or survey number. Enter the number that needs to be updated, and press <ENTER>. You will then have a registration screen, appear with all of the information that was entered on that survey. Use your arrow keys, or press <ENTER> to get to the field that needs to be updated. After making the correction, press F2 to save the information.

NOTE* If you find that you cannot get past a certain field, and the terminal BEEPS at you each time you try, then check your records, that field may no longer be active or available, e.g. the sales office may be terminated if it is from another date. In this case, notify your supervisor, so they can make the proper adjustments. As always, you can exit by pressing <ESC>, and then pressing "Y" to abandon.

1.9 CHANGE JOURNAL DATE

1.9.1 PURPOSE

To change to "daily view" of the computer to a different day. If you need to make a correction use this. Change the journal date to the day that you need and press <RETURN>. Then follow the above procedures to perform your task. BE SURE TO CHANGE THE DATE BACK TO TODAY'S DATE BEFORE PROCEEDING WITH ANY ENTRIES FOR TODAY. If you have forgotten to change the date, all registrations that you do will be entered on the date that you changed to.

NOTE* This is another guarded option. If you do not have the capability to "change journal dates", contact your supervisor.