

Home Sales Desk Help?

Member Search

Member Details

Cape Paterson
123 Any Street
Any Town
California
90210-1234

Member Code 44356

Contact Joe Morgan
Email resort@resort.com
Phone 246 436-2282
Toll Free 800 436-2282
Fax 246 436-0001
Staff John Smith
Jenny Jones
Sales Agent Hetty Gates
Support Rep Guy Killoran
Last sales Contact 12 July 2010
Last Supt Contact 10 April 2010
Support Status Gold Key
Expiry Monthly
RezExpert Online Yes
Volume 66,234.66

Member Sales History

Member Notes

Make Sale Add Note Add Task Add Client Make Rez Send Email Call Client End of Day

Task List

Commission Account

Notes

Sales Activity

Client Statistics

Home Sales Desk New Sale Help?

1. Client Selected: Cape Paterson

2. CHARGES / CREDITS

3. PAYMENTS / TRANSFERS

Member Sales History

Home Sales Desk New Note Help?

Member Search

Member Details

2. NOTE DETAILS

3. ADDITIONAL INFO

Member Sales History

Member Notes

Home Sales Desk New Task Help?

Member Search

Member Details

2. TASK DETAILS

3. ADDITIONAL TASK

Member Sales History

Member Notes

Full Walk-up, Reservation and Property Management

Home Sales Desk Make Rez - Step 1 Help?

Step 1. Check Availability

18-June-2010

Availability From June 18 to July 5

RV Sites	Capacity	Rate	3-Mth	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	
Unit Type	Rate	3-Mth	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	Max	
Full Pull-through	33.00	View	4	30	1	4	3	2	1	0	0	0	0	2	3	4	2	3	7	8
Full Back-in	28.50	View	4	35	2	2	2	2	2	1	3	2	1	0	0	0	0	2	3	4
WSE wheelchair	34.00	View	4	40	1	4	3	2	1	0	0	0	0	2	3	4	2	3	7	8
WSE - Pet Ready	40.00	View	4	30	2	2	2	2	2	1	3	2	1	0	0	0	0	2	3	4
Another RV Type	33.00	View	4	25	1	4	3	2	1	0	0	0	0	2	3	4	2	3	7	8
Another RV Type	33.00	View	4	30	2	2	2	2	2	1	3	2	1	0	0	0	0	2	3	4
Another RV Type	43.00	View	6	40	1	4	3	2	1	0	0	0	0	2	3	4	2	3	7	8
Another RV Type	23.00	View	8	25	2	2	2	2	2	1	3	2	1	0	0	0	0	2	3	4
Another RV Type	38.00	View	4	25	1	4	3	2	1	0	0	0	0	2	3	4	2	3	7	8
Another RV Type	33.00	View	4	35	2	2	2	2	2	1	3	2	1	0	0	0	0	2	3	4

Type From To Adult 14+ Child 1-6 Child 6-15 Pet

Full Book-in 18-June-2010 24-June-2010 2 1

WSE - Pet Ready 26-June-2010 7-July-2010 2 1

Get Quote

Home Sales Desk Make Rez - Step 2 Help?

Step 2. Booking Details

Personal Information

Additional Instructions from Client

Terms, Conditions and Deposit Policies

Confirm Booking

Credit Card Information

Home Sales Desk Rez Search Help?

1. Rez Selected:

Advanced Search Criteria

2. Charges / Credits:

3. Payments / On Hold:

Member Rez History

New! - Support Notes

Home Support Desk New Note Help?

Member Search

Member Details

2. CLIENT'S ISSUE

3. SUPPORT SOLUTION

3. ADDITIONAL INFO

Member Tasks History

Member Notes History

"Easy as 1,2,3"

"New! Two Step Reservation" on One Screen + Rez Utility

The "Action Bar" delivers the user to easy-to-navigate functionality. The sliding panels on this site provide a ready-made, position-friendly set of filtered lists relating to personal tasks assigned, client notes and employee incentive packages – fully adjustable and data driven.

"The Front Desk"

Make a Sale

Add a Note

Add a Task

RezExpert Online Business #98228 Customer Service Module
 Logged In: (Logout) Security Level: Sales Person

Home Sales Desk Help?

Member Search
 Member Details
 Cape Paterson
 123 Any Street 2nd Address Line
 Any Town California USA
 90210-1234
 Member Code: 44356
 Contact: Joe Morgan
 Email: reson@resort.com
 Phone: 246 436-2282
 Toll Free: 800 436-2282
 Fax: 246 436-0001
 Staff: John Smith, Jenny Jones
 Sales Agent: Hetty Gates
 Support Rep: Guy Killoran
 Last sales Contact: 12 July 2010
 Last Supt Contact: 10 April 2010
 Support Status: Gold Key
 Expiry: Monthly
 RezExpert Online: Yes
 Volume: 66,234.56
 Member Sales History
 Member Notes

Make Sale Add Note Add Task Add Client Make Rez Send Email Call Client End of Day

Task List Commission Account Notes Sales Activity Client Statistics

Home Sales Desk New Sale Help?

Client Selected: Cape Paterson

Save as Quote Cancel Submit

2. CHARGES / CREDITS
 Enter Product Code OR Select Product Group
 Quantity Price Amount Including Tax
 Taxes: Tax 1 Tax 2 Tax 3 Tax 4

3. PAYMENTS / TRANSFERS
 Select Payment Type Enter Amount

Home Sales Desk New Note Help?

Member Search Member Details

Cancel Submit

2. NOTE DETAILS
 Note Type: Lead Marketing Presentation Closing Service Contact
 To Lead? Dismissed Disallowed Contact Method
 Note Entry Date: 09/01/2009 Note Spent (mln):

3. ADDITIONAL INFO
 Current Date: 09/01/2009 Task Completion: High Task Type: Marketing Presentation Closing Support Need

Home Sales Desk New Task Help?

Member Search Member Details

Cancel Submit

2. TASK DETAILS
 Exp. Completion Date: 09/01/2009 Priority: High Task Type: Lead Marketing Presentation Closing Service Contact Contact Method
 Not Started Incomplete Reached Completion Date: 09/01/2009 Show print

3. ADDITIONAL TASK
 Current Date: 01-Sep-2009 Task Assignment: High

Marketing Console

Your Block of Business

1. Lead Generation		2. Current Prospects	
Time Period	Count	Time Period	Count
Month: 4	Direct from Agent: 2	Month: 4	Direct from Agent: 1
Quarter: 8	Campaign: 12	Quarter: 8	Campaign: 2
Year To Date: 12	Facebook: 4	Year To Date: 12	Facebook: 2
Net Block: 246	Social (other): 2	Net Block: 246	Social (other): 0
Lease: 15	Referral: 2	Lease: 15	Referral: 1
Total: 22	Total: 6	Total: 22	Total: 6

Task Lists

Task List

Date	Type	Member	Member Name	Phone #	Email	Category	Priority
01 July 2010	Presentation	6743	Aalberg Ski	246 436-2282	reson@resort.com	Condo	High
01 July 2010	Follow-up	6743	Aalberg Ski	246 436-2282	reson@resort.com	Condo	High
01 July 2010	Sale	234	Beachaven Motels	246 436-2282	reson@resort.com	Hotel / Inn	High

Commissions

Commission Account

Date	Invoice #	Member #	Member Name	Product	Balance Paid	Amount	Commission	%
01 July 2010	234126	6743	Aalberg Ski	Maintenance Fee	\$ 38,967.00	\$ 2600.14	6.72%	
01 July 2010	234127	234	Beachaven Motels	Maintenance Fee	686.00	\$ 34.25	5.00%	

Online Rez Activity

Date	Invoice #	Member #	Member Name	Product	Balance Paid	Amount	OR Commission	%
01 July 2010	234126	6743	Aalberg Ski	Deluxe Cabin	388.00	10.59	2.75%	
01 July 2010	234127	234	Beachaven Motels	Full Back In	129.00	1.61	1.25%	

Sales Activity

Date	Invoice #	Member #	Member Name	Product	Amount	Commission	%
01 July 2010	234126	6743	Aalberg Ski	Maintenance Fee	\$ 38,967.00	\$ 2600.14	6.72%
01 July 2010	234127	234	Beachaven Motels	Maintenance Fee	686.00	\$ 34.25	5.00%

Notes
 Client NPV
 Cutoffs
 Auditing
 Goals

DR's new work environment

Client Rez Data

Sales Activity

"Anyone's Front Desk"

Make a Sale

Add a Note

Add a Task

RezExpert Online Business #98228 Customer Service Module Logged In: (Logout) Security Level: Sales Person

Digital rez.com News Support RezExpert API Contact Us Profile

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Task List
Commission Account
Notes
Sales Activity
Client Statistics

New Sale / Quote

Save as Quote Cancel Submit

1. CHARGES / CREDITS

Enter Product Code OR Select Product Group Select Product

Quantity Price Amount Including Tax

Taxes Tax 1 Tax 2 Tax 3 Tax 4

Product Code Description Price Qty Tax Amount

2. PAYMENTS / TRANSFERS

Select Payment Type Enter Amount

Payment Type / Reference Amount Cur.Type Amount

New Sales Note

Cancel Submit

2. NOTE DETAILS

Note Type
 Lead Marketing
 Presentation
 Closing
 Service Contact
 In-Quote
 Checklist
 Disbound
 Contact Method

3. ADDITIONAL INFO

Current Date: 01-Sep-2009
 New Task Task Completion Priority
 09/01/2009 High

Task Types
 Support Department
 Assign to Support Rep
 Admin Department
 Field Management

New Sales Task

Cancel Submit

3. TASK DETAILS

Exp. Completion Date: 09/01/2009 Priority: High

Task Assignment
 Not Started
 On Hold
 Reached
 Completion Date: 09/01/2009 Show/print

Additional Task Task Completion Priority
 09/01/2009 High

New! Allocation Management to 3rd Party Channels

Rez Search

All Reservations Arrivals Departures Who's Here No Shows Advance Search

Information Arrival Date Departure Date Status Action

• **Christin Gilbert**
Member #: Confirm #:
January 23, 2010 January 27, 2010

• **Ken Labonte**
Member #: Confirm #:
January 23, 2010 January 27, 2010

• **Latonda the Caribbean Goddess**
Member #: Confirm #:
January 23, 2010 January 27, 2010

• **Karenwood Gilbert**
Member #: Confirm #:
January 23, 2010 January 27, 2010

• **John Doe**
Member #: Confirm #:
January 23, 2010 January 27, 2010

• **Blaine Portefield**
Member #: Confirm #:
January 23, 2010 January 27, 2010

• **Aaron Smackholder**
Member #: Confirm #:
January 23, 2010 January 27, 2010

• **Ann Henderson**
Member #: Confirm #:
January 23, 2010 January 27, 2010

• **Vhienne Veronica**
Member #: Confirm #:
January 23, 2010 January 27, 2010

Notes
Client NPV
Cutoffs
Auditing
Projects

Inventory Conflict Auditor

Conflicts (4)

RC - May 11, 2010 To May 12, 2010 - Over-Booked (1)
 RC - Jun 25, 2010 To Jun 26, 2010 - Over-Booked (1)
 RC - Jun 27, 2010 To Jul 1, 2010 - Over-Booked (2)
 RC - Jul 2, 2010 To Jul 20, 2010 - Over-Booked (1)

Friday, June 25, 2010

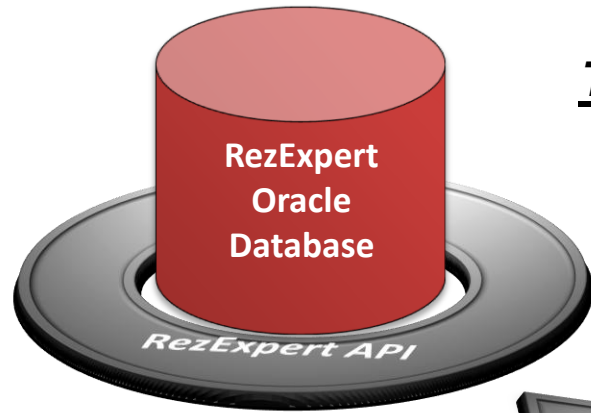
RC	Jun 25	Jun 26	Jun 27	Jun 28	Jun 29	Jun 30	Jul 1	Jul 2	Jul 3
Original	10	10	10	10	10	10	10	10	10
Override	10	10	10	10	10	10	10	10	10
Sold	1	1	2	2	2	2	2	1	
Allocated	0	0	0	0	0	0	0	0	0
Available	(1)	(1)	(1)	(1)	(1)	(1)	(1)	(1)	(1)

Inventory Allocation

Friday, March 12, 2010

Back In Water/Seaw	Mar 12	Mar 13	Mar 14	Mar 15	Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22	Mar 23	Mar 24	Mar 25	Mar 26	Mar 27	Mar 28	Mar 29	Mar 30	Mar 31
Original	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Override	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Sold	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Allocated	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Available	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Expedia Sold	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Expedia Avail	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Allocated	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
RVT Online Sold	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
RVT Online Avail	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deluxe Cabins	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Original	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8
Override	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8
Sold	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Allocated	1	3	3	1	2	1	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Available	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

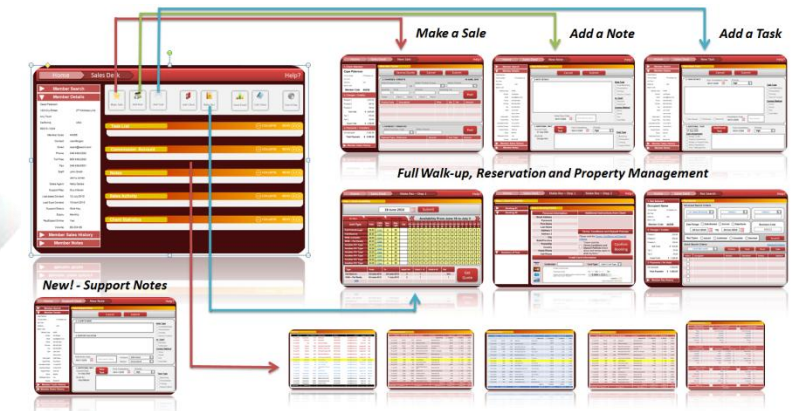
We're learning how to make it "Easy as 1,2,3"



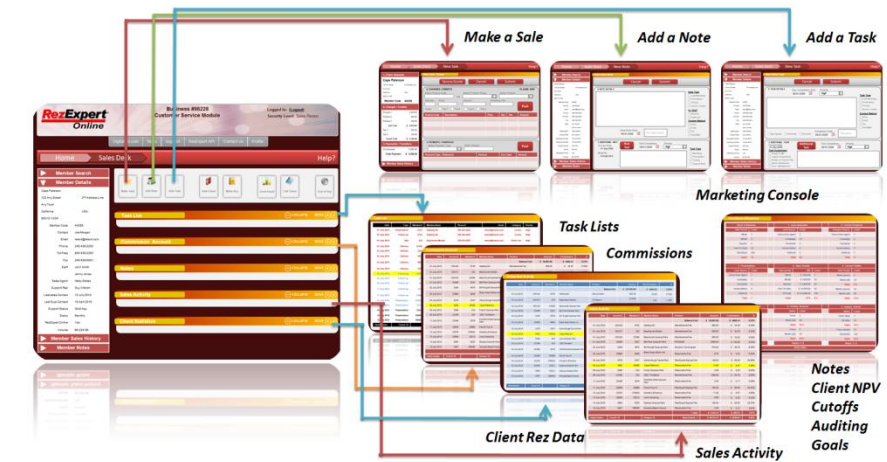
The RX API is the heart of it



Rez / Sales / Support / Marketing



Administrative / Audit / Dev / IT



Exec / Management



What remains is 30 – 60 days of development, deployment and refinement : 15 – 20 Pages, plus Security = rock-solid