MakeRez

We Put Heads In Your Beds

The MakeRez Guide

Reservations and Relationship Marketing For Vacation Rentals

A Common Sense Approach

MakeRez is focused at bringing a set of tools to the vacation rental marketplace. The backbone of MakeRez is a simple to use reservation system that allows your guests to book any time of the day and provides marketing tools to help you keep their "heads in your Beds". But the heart and soul of MakeRez is all about "Relationship Marketing". Building great relationships with your guests to keep them coming back again and again. And through them, reaching out to others in their circle of friends and family.

Release 2.2 October 2018

About Us

Our journey to the breathtaking mountains of the Carolina's began over a decade ago, and it is a dream come true. It was time to get away from the cold and fast pace of the Mid-West and create our year round Timber Frame home. We live in *RiverDance* full-time and have turned it into an intimate outdoor focused bed and breakfast and have had a wonderful time working with and enjoying our guests.

As we thought about ways to more effectively manage RiverDance, many of the solutions we looked at either were way over priced for a small operation like ours or simply didn't have enough capabilities to make them worthwhile. With almost 40 years in the technology industry and a long background in programming it seemed a natural idea to create a management platform for RiverDance that was easy to use and really made a contribution to keeping us on task with booking more guests. **MakeRez**, was originally conceived just for our private use at RiverDance. But the more we worked with it and used it to help us manage things more effectively we realized that the concept could be valuable for a wide variety of folks in the vacation rental industry. RiverDance has exceeded our wildest dreams and we wouldn't have been able to meet the expectations of our guests without the automation that helped us communicate effectively with them, allowed potential guests to make reservation anytime, anywhere and enabled us to understand where guests were coming from and what motivated them to come to RiverDance.

As MakeRez evolved it became clear that just creating a new reservation system was not enough. The true value was to give us tools to help build outstanding relationships with our guests and through them reach out to others. One example: When I'm on the hunt for something, whether it's looking for a plumber or for a place to stay on our next vacation, I absolutely hate to be ignored. If someone ignores me before they make the sale, how are they going to treat me afterwards? With MakeRez the average time to get back to inquiries with valuable information is less than 5 minutes. A great way to start building a relationship. You can learn a little more about RiverDance at http://www.riverdancenc.com.

Community Guided

One of the central tenets of developing **MakeRez** is to actively gather the ideas of a wide range of folks in the hospitality industry and also folks who are involved in managing other small businesses. As we move forward, we envision an active MakeRez community that takes a central role in guiding its future development. We think there is no better way to ensure that it stays true to its founding principles of making a unique contribution to the hospitality market.

Disclaimer: MakeRez is still undergoing development. Part of the rational for the Beta deployment is to get feedback from folks on what could be added to make it a better solution. As a result, you will occasionally see a stale video or image that has changed a bit. Also since we have been running vacation rentals for almost 15 years, some of the guest we talk about visited us quite a while ago. Thanks ahead of time for your understanding.

Note: Also different words are used depending on the type of property to denote a single unit that an individual may rent. It may be a room, suite, apartment, cabin, house,... In this manual when we refer to a room or a unit, we mean the element that pertains to your property.

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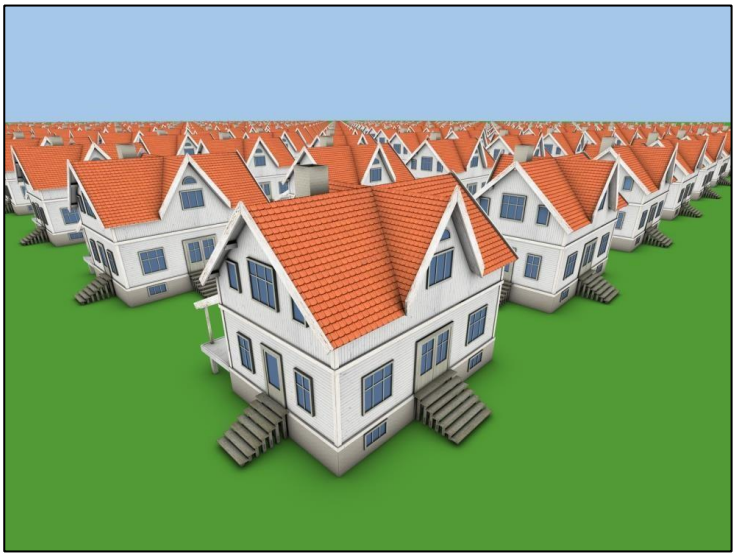
Preface

Relationship Marketing



Don't Just Be Part of the Crowd

Perhaps the most important success factor in most small businesses is the relationships you build with your customers. Small business can thrive when customers come back again and again and even more so when they introduce their family and friends to you. At the same time, small business can suffer greatly when your customers decide to go elsewhere, either because it is more convenient, less expensive or you haven't met their expectations. Even meeting their expectations isn't a guarantee, since those expectations can often be met by many others. So how do you stand out from the crowd of others clamoring for your customers business?

"**Relationship Marketing**" is simply trying to use your most valuable resource, your guests, to help you spread the word. We often say "**if you simply meet a guest's expectation**s" then you have lost a golden opportunity. For most folks it is easy to "**Meet Their Expectations**", whether they are going to a fast food restaurant, the grocery store or choosing where to stay on a trip. The real key is to find a way to **DELIGHT** them so you stand out from the crowd and build the loyalty that is so critical to your success. So you look for the little ways to make their stay special. Sometimes it's the things you provide like offering them a comfy pillow, or providing maps to local attractions. But most often it's in a caring and thoughtful staff who are seriously interested in your guests experience with you both before and after their visit. By setting yourself up as a special place for them, not only are you well on your way to earning their loyalty, but you also have the opportunity to reach through them to others in the circle of friends and family. Even better, by taking that extra step you make it all so much more likely that they will report on their delightful experience by writing a great review.

Sounds like a fine idea, but how do you go about doing it? Most of us don't have people to keep track of and communicate that often with our guests, to find out where they come from, how they found us, and provide business intelligence on how to most effectively reach out to them. For many small businesses one of the biggest challenges is how to effectively market your businesses. What channels should you

focus on, which of them is producing best? When is the right time to do your marketing? How can you keep your existing customers and reach through them to gain new ones? The key to doing all this is collecting, organizing and using the information you already have at your fingertips. The **backbone** of MakeRez is a reservation system that offers anytime, anywhere reservations, a wealth of management tools and allows you to manage your business more productively.

But most reservation systems for our business were created in the days where a single computer was installed in your office to enter and keep track of reservations. Even though they have evolved in this age of cloud based, anytime, anywhere computing, the architecture of those systems are often still mired in the past. One of the hallmarks of this new world that your customers have grown to expect are frequent, timely communication about their interests, access to the thoughts and feeling of others who have traveled the same road and the desire to "Pay It Forward" by providing others their thoughts on what worked well, and not so well, with them. This is not just about reservations any more, it is about building relationships (so people come back again and again) and using those relationships to reach out to others.

The **heart and soul** of MakeRez is an email communication system that will allow you to find and build those relationships that are so vital to your success. Let's look at just a couple of ways this could work.

> **Handling Inquiries:** You use a variety of advertising services and many of them will send you inquiries from potential guests. Some inquiries have rather complete information while others will provide only a potential guests name and a way to email them. The question is do you see all of them? Do some go into your spam folder? How quickly do you respond? It’s a simple rule of thumb that, the quicker you get back to potential guests with interesting information the more likely you are to get a booking. Especially in the vacation rental world where a potential guest may be sending out similar inquires to a host of other properties.
>
> So how does MakeRez help you here? First, a MakeRez.com based email account is setup that will serve as the initial email destination for all those inquiries. That account, on receiving an email, will immediately forward a copy back to you, so it is also in your inbox and you can handle it in your normal fashion. If that email is an inquiry, it is particularly important that the potential guest hear back as quickly as possible. You may not be able to answer their questions immediately, but you can certainly provide them with compelling information why staying with you is their best choice. That information should be back in your potential guests hand within five minutes of them sending in the original inquiry. That’s a timeline that will be hard for others to compete with.
>
> **extendAStay**: We all hate open days on our schedule. One way to fill some of them up is to simply look at which guests have booked that property either immediately before or after the opening. They are automatically sent an **extendAStay** email approximately 10 days before their arrival asking if they would like to add days their stay. A special offer to entice them to act could also be in order.

So do you want to stand out from the crowd? Dive in and see just how "**Relationship Marketing**" can be part of your answer.

Use Relationship Management To Stand Out from the Crowd

Definitions

Property Group - A group of related units (rooms, cabins. suites,.) that represent something like a grouping of cabins that are managed together. The units in a property group are identified by a common propGroup field the property table in the database. Taking a look at the property group table on the Admin page will illustrate this. The property group is one way information is presented either in reports or in the calendar widget that displays online booking information to your customers.

Desktop Calendar Widget - This is the face of the Internet Booking Engine that will be displayed to a potential customer on a desktop, laptop or tablet. It is embedded in the code for the Availability page on the website that features a specific property group (like a bed and breakfast or a cluster of cabins that are managed together). The Getting Started Appendix has the instructions to embed the Desktop Calendar Widget in your web page. The calendar is presented in a month at a time fashion with rows for each of the rooms/units/cabins .. in the property group.

Mobile Calendar Widget - The Mobile Calendar Widget is the face of Internet Booking Engine that will be displayed to a potential customer on cell phone devices. Similar in function to the desktop calendar widget, its main difference is in how much of the calendar is displayed (one week at a time versus a month at a time for the desktop). The controls (<,>) will move the calendar only by a week and the (<<,>>) controls will move the calendar by a month. You can also use the drop down month selection to choose a specific month to focus on. When you move to a new month, the week with the first of that month in it will be displayed. Once the guest has made their calendar selection, they only need to fill out the rest of the guest data that is required for the reservation or inquiry.

Hidden Calendar Widget – If you don't want to expose your actual availability to be visible to your potential guests, the hidden calendar will make sense. Your guests will see the following form displayed and then they can fill in their desired arrival date and number of nights. When the "Check Availability" is selected the system will check on which units are available for that timeframe and display them.

guest.csv layout - The primary way to get guest data in bulk into **MakeRez** is to create a Excel spreadsheet that contains all the relevant information for each guest to be added. That is done with the "**Add More DB Data**" button on the Admin page. This guest.csv layout is also used, by the "**Backup guest.csv**" button, again on the Admin page. That is the way you export guest data from **MakeRez** to further massage and filter in a spreadsheet to prepare information for your marketing campaigns. You can use this data by importing it into email campaign tools like Constant Contact or Mail Chimp to do email marketing campaigns to previous guests or inquiries. There is more about the elements of the guest.csv file

Email Templates - Email templates, like the one illustrated below, give you the ability to create effective communications with your inquiries/guests that keep them informed and help move them through the process of making a reservation. They also help in communicating with them both before and after their visit is completed. Emails based on the email templates can be initiated by the user by selecting one of the workflow steps, like sending a contract, that include an email component. You can read more about how email templates are used in the workflow area by going to the description of how Guest Workflow section is used within the Guest page. Also email templates are used when the **MakeRez** system itself sends out emails (such as **welcome**). The parts of the email are modified by html elements (enclosed by <>) are used to detail how the email is presented.

```
<html>
<body>
[[HEADER]]

<p>We have made the following reservation for you. Please take a look at the information in this booking confirmation. Could you review it to be sure that it accurately reflects the stay that you have planned at [[PROPERTY]]. If you have any questions about [[PROPERTY]], the booking itself, or things to do in the area, please feel free to call us.</p>

<p>We look forward to your sharing all that [[PROPERTY]] and the surrounding area offers.</p>

<p>For [[PROPERTY]], a Reservation has been made for:<br><br>

[[NAME]]<br>
[[STREET]]<br>
[[CITY]], [[STATE]] [[ZIP]]<br><br>
<b>Cell Phone:</b>  [[CELLNUM]]<br>
Please note that ATT and T-Mobile cell services has very limited coverage in the mountains.<br>
<b>Alternate Phone:</b>  [[ALTNUM]]<br>
<b>Email:</b> [[EMAIL]]<br><br>

<b>Unit:</b> [[PROPUNIT]]<br>
<b>Number of Guests:</b> [[PEOPLE]]<br>
<b>Check in Date:</b>  [[ARRIVALDATE]] , Staying: [[NIGHTS]] Night(s)<br>
<b>Arrival Time:</b>  [[ARRIVALTIME]]<br>
<b>Checkout Date:</b>  [[DEPARTUREDATE]]</p>

<p><b>Your confirmation number:</b> [[CONFIRMATION]]</p>

<p><b>Your comments:</b>  [[COMMENTS]]</p>

[[FOOTER]]
</body>
</html>
```

Booking Email Template

Tags - Most of the emails that MakeRez deals with are called "transactional" emails. They happen when a specific transaction is completed, like a booking is made. These transactional emails need to reflect the personality of your business and be effective at communicating. At the same time they need to be easy to maintain and used seamlessly within MakeRez. With over sixteen types of transactional emails in use, managing and maintaining them needs to be done carefully and flexibly. One of the important tips in making sure MakeRez presents you in a professional manner, is that once you have made changes to a transactional email, you always should send that email to yourself to make sure it effectively getting your message across.

You should set yourself up, along with your email address, as the first guest in the database, the one with guest id 1. Then emailHelper, discussed later, can use your information and your email address to test transactional emails as they are changed.

As mentioned above, there are four basic types of tags used by the email system.

1. **Database Tags:** Database tags are directly entered as guest information into the database and are things like the [[ADDRESS]] and the [[STATE]].
2. **Derived Tags:** Derived tags are information derived at the time the email is being sent out and are things like the [[STAX]] (state tax) or a [[RECEIPT]].
3. **Table Tags**: Table tags are information that is pulled out of things like the Property Group Table [[MARKETING]], the config table [[MGREMAIL]] (managers email), or the property table [[PROPUNIT]], the name of the unit that was rented.
4. **Smart Tags**: Smart tags are custom tags that a subscriber can set to contain the html information for an image to be included in a email, or a link to be included, or simply a bunch of text that describes a special offer. More on their use later.

Two of the most powerful tags are the [[HEADER]] and [[FOOTER]] tags. These are defined in the property group table in the database. Every transactional email that comes with the standard account setup for MakeRez starts with a [[HEADER]] tag and ends with a [[FOOTER] tag. Here is the start and end of the raw form of the "inquiry" email shown above.

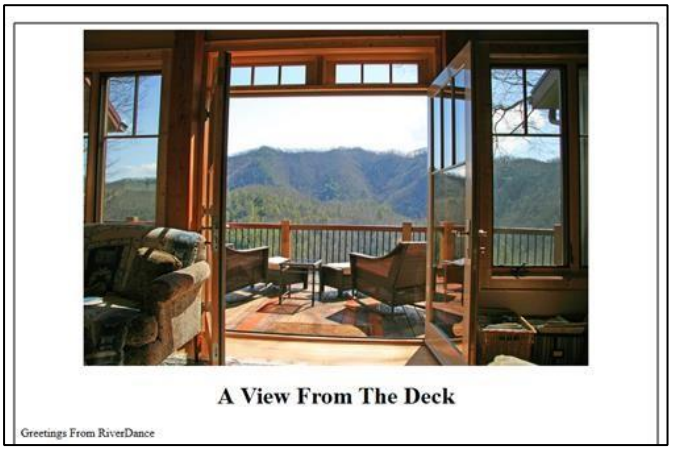
```
<html>
<body>
[[HEADER]]
```

Raw Email Start

```
[[FOOTER]]
</body>
</html>
```

Raw Email End

The elements in the <> brackets are actually small pieces of html that start and finish the html processing for the transactional email. During the "replacement" process mentioned above the [[HEADER]] tag and the [[FOOTER]] tag will be replaced by information that is kept in the appropriate property group table.



The [[HEADER]] Area

Let's take a look at how we use the [[HEADER]] tag at RiverDance. This is its definition.

```
<img src="[[PIMAGE]]" style="display:block; margin:0 auto;" width="80%" />
<h1 align="center"><b>A View From The Deck</b></h1>
<p>Greetings From [[PROPERTY]]</p>
```

Pretty complex, so let's break it down. The first line is a fragment of html that puts that great image of the mountains and the back deck of RiverDance in the email. The second centers and puts "A View From The Deck" in bold in the email where the third line is responsible for the greeting line. Note that both the first line and the third line actually have other tags embedded in them.

Whew, so what does all this buy you anyway? First, across every transactional email used at RiverDance the use of [[HEADER]] and [[FOOTER]] in this way provides for consistency, and ease of maintenance. Changing the definition of [[HEADER]] automatically is propagated to all the transactional emails. The use of the image provides an attractive start to the email that can capture a prospective guests attention or remind a past guest of the great times they had at RiverDance.

If that was all the [[HEADER]] did it would be very useful. But it gets even better. Because of the two other tags [[PIMAGE]] and [[PROPERTY]] that are part of it, the [[HEADER]] tag can be used by anyone who uses the MakeRez system to manage their properties. They simply have to define [[PIMAGE]] as their iconic picture and [[PROPERTY]]is derived from their configuration. The bottom line, the [[HEADER]] and [[FOOTER]] approach is available out of the box.

MakeRez Layers

One of the interesting concepts about MakeRez is that you can start using it in a very small way and then gradually use more and more of its capabilities. There is certainly nothing in the software that would prevent you from starting with its full capabilities, but, based on our experience, a more structured approach to using it capabilities should be considered. Following is the typical progression of layers that a MakeRez user might go through

Offline: The initial layer could be to start by loading your existing and future reservations into MakeRez. As new reservation or inquiries come in, you can also enter them directly into MakeRez through the guest page. With this approach you have a fully functional calendar available in addition to being able to use the searching and reporting facility. The initial setup of MakeRez consists of loading in of the initial guest data in addition to the configuration of MakeRez to work in a way that mirrors the way you run your business. When you are running in offline mode there is no email communication sent either to you or your customers. So no booking, contract, receipt,... emails are sent. In essence you are running in "demo" mode**.**

Online: This layer adds two significant capabilities to MakeRez that are coupled together. The first is the addition of automatic MakeRez generated emails for welcoming guests, thanking guests, sending guests a reservation confirmation, sending contracts and receipts and a variety of other marketing related emails. As part of your installation of MakeRez there are 16 different types of emails that can be customized to more closely reflect the way you operate your business. Most of those emails require very little customization to work for your business since each email has special database tags like [[PROPERTY]] in them which is replaced by the name of your business as the email is being created. You can see additional information about this process in the section on definitions above and in the Email Communications and Marketing section later in the manual. The second major component of going online, is to add the MakeRez calendar (both the desktop and mobile version if appropriate) into your property website. That will have to be done by whoever creates that website with information that is present in the Appendix C, Getting Started With MakeRez.

Integration: This layer will add three significant capabilities. The first is Calendar Integration. One of the aggravating problems with having your availability calendar displayed on both your property website and other websites like homeaway.com is the requirement to update those calendars every time a reservation or

cancellation is made. MakeRez updates your calendar synch files with every change to your calendar and allows those changes to be pulled out to the other advertising services you use that also display your calendar. There will still be a time delay, since the other websites will pull your updated calendar synch file on their own schedule, but the vast majority of the time all the calendars will be the same. Note this is "one way synch" that copies the information in the MakeRez calendar into the other calendars managed by folks like the HomeAway family, airbnb, FlipKey,… When a new reservation from any of these services is sent to you, as quickly as possible put it into the MakeRez calendar so it will be propagated into the others.

The **second** integration is MakeRez's ability to parse and process inquiries that come from those other services via email. HomeAway, VRBO, FlipKey, airbnb, ...HomeAway, airbnb and FlipKey both act as online travel agents (OTA's) where their business model relies on them collecting a commission for the booking. That requires that they control the transaction (at least until the booking is actually made and the customer makes either a deposit of the full payment for their visit). This limits the information a potential guest will see to just what is displayed on the OTA page. And as time sensitive as inquiries are there is no guarantee that we will see them quickly since they may come in while we are asleep, or in an environment where we simply aren't checking our cell phones frequently.

The longer we wait to get back to that potential guest with more information, the more likely that they will move onto other possible lodging choices and make their reservation there. While it may be impossible to more quickly see the questions the potential guest is asking and specifically respond to that question, wouldn't it be better to quickly send some type of response back that acknowledges their inquiry and provides additional, relevant information back to the customer that gives them a host of reasons to more strongly consider your property?

Fortunately that is possible to do using the standard tools today. Following is a step by step procedure to use MakeRez to respond immediately to those inquiries without you having to lift a finger.

First let's look at how the whole process will work. The key is to setup a new MakeRez email account that will help you quickly process those inquiries and get ahead of the other folks. You will use that account as the email account you ask airbnb, HomeAway, FlipKey and your direct website to send communications to. The first thing the account will do on receiving a new email is that it will immediately (no time lag) forward that email to the normal email account you use today to monitor communications from these services so you can act on it in your normal fashion. So you will see that email just as fast. Next the MakeRez account will use what are called filters to detect that this particular email is an incoming inquiry from one of your booking services (direct, airbnb, HomeAway family, FlipKey). Once that filter detection happens a "canned message" is automatically sent back to the potential guest.

All this happens in seconds. So you get the original inquiry in your normal email account and use the standard tools from airbnb, HomeAway family, FlipKey to respond to the inquiries questions. It is important to respond through their tools because that allows them to monitor how quickly you are responding and that may have an impact on your rankings with them. The potential guest gets an immediate response through your email process with interesting information about your property and as quickly as possible you manually send them back a response answering their question(s)

The **third** type of integration is the ability of MakeRez to export all the guest records into an excel compatible spreadsheet or to export the results or many of the searches or reports it makes also into an excel compatible spreadsheet.

Custom Emails: During its normal operation, MakeRez can send out 16 different types of emails that allow you to share important information with your guests and prospective guests, and also offer an important opportunity to ask those folks to come back and to share their experiences with their friends and family. Another important marketing tool is to send out custom emails to specific groups of guests or folks who have inquired but not yet stayed at you property to entice them to make a reservation. While some properties may use something like Constant Contact, or mailChimp for that purpose, MakeRez also offers a custom email marketing feature. For example, at our property, RiverDance, we declare that March is Tennessee month and make folks from Tennessee a special offer. So we go to the Search page and spell out the demographics we are looking for, all folks from Tennessee that have either booked or inquired in the last two years. Then use

the Search page to create the list of folks that match that criteria and send a custom email to them with the specifics of the offer. As a rule of thumb, if you are sending out thousands of emails in a single campaign, perhaps a Spring newsletter to all your guests and prospective guests, you should probably use a fancier email marketing system for that. But in the case you may be sending out a couple hundred email messages and want to do it in the easiest fashion possible, then MakeRez's approach could make more sense.

Chapter 1 -An Introduction to MakeRez

The three areas that **MakeRez** focuses on are:

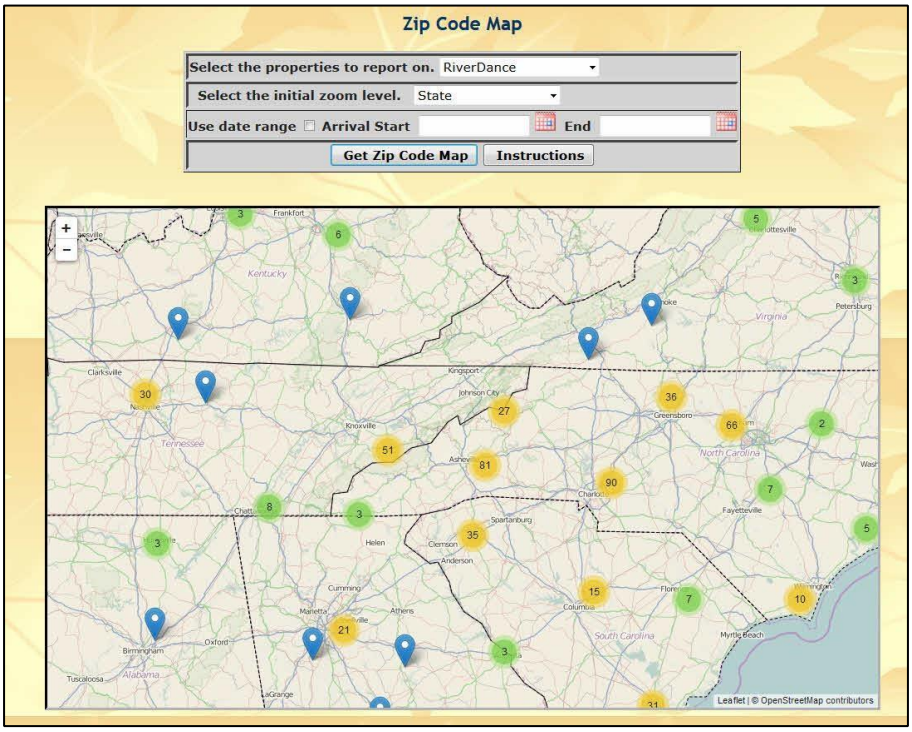
The Relationship Marketing Engine: A major focus of **MakeRez** is its to help you market your property more effectively. It does this is several basic ways:

Making sure you have efficient and full communications with your guest and potential guests. Part of this is done using automatic jobs that the system runs on its own. One example: You use a variety of advertising services and many of them will send you inquiries from potential guests. Some inquiries have rather complete information while others will provide only a potential guests name and a way to email them. Do you see all of them? Do some go into your spam folder? How quickly do you get back to them with relevant information? It's a simple rule of thumb that the quicker you get back to potential guests with interesting information; the more likely you are to get a booking. **MakeRez** can automatically grab your incoming inquiries, parse them for important information and respond to the inquiry within minutes by sending out a marketing overview of your property and links to relevant information like your online calendar.

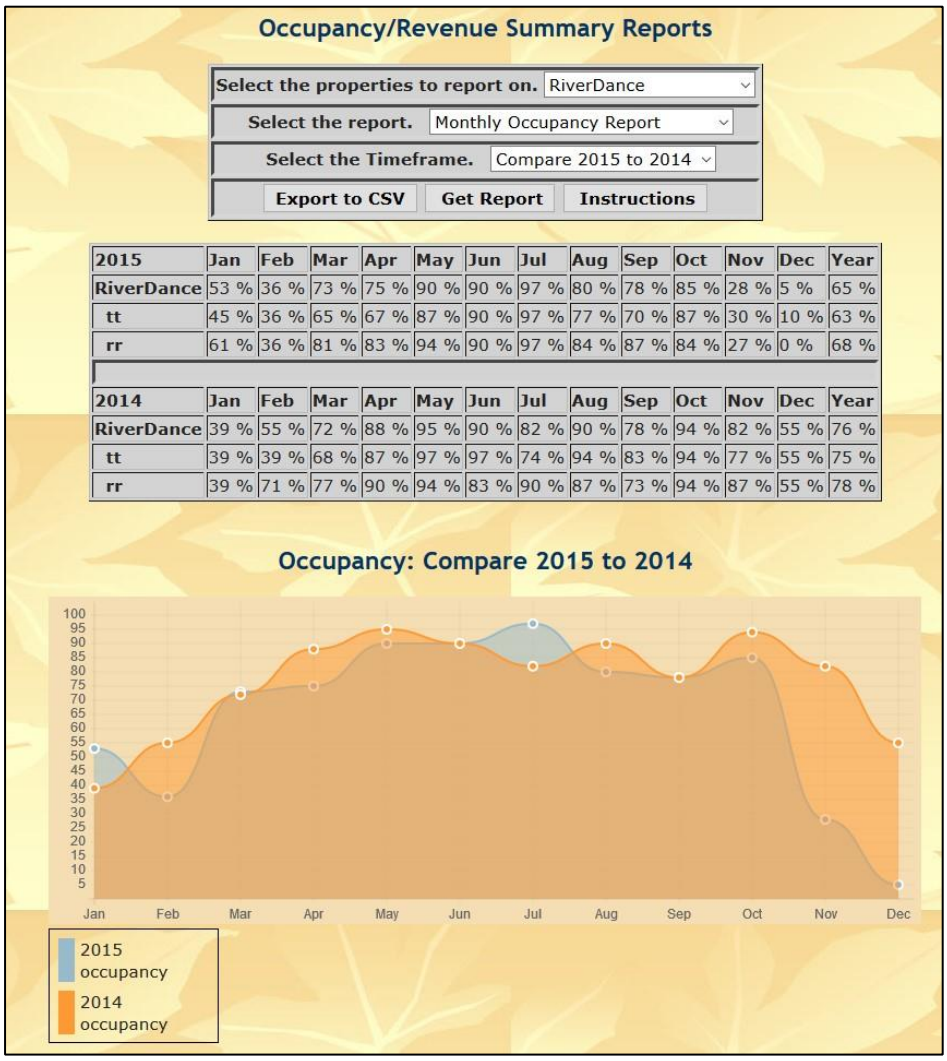
MakeRez will also automatically send out your **welcome** email containing directions... , a **thank you** email (again with the marketing overview and a request to share it with others), **reminder** emails to ask previous customers to come back and also emails to present customers with an opportunity to **extend** their stay. Also custom email campaigns are supported.

The system also sends out a variety of emails at your direction while you are using the **Workflow Tab** on the Guest page. These emails are things like booking confirmation, contracts, receipts, ...

The second way that **MakeRez** aides your marketing is to give you visibility into reasons your guests are coming, where they are coming from, and much more. All buried in the demographic data you collect. One example of that is the zip code map that helps you visualize where your guests/inquiries are coming from.



Finally **MakeRez** provides a variety of operational reports that help you keep track of your occupancy levels, your revenue generation and provides the ability to compare those to previous years to help assess your current operation.



2015	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
RiverDance	53 %	36 %	73 %	75 %	90 %	90 %	97 %	80 %	78 %	85 %	28 %	5 %	65 %
tt	45 %	36 %	65 %	67 %	87 %	90 %	97 %	77 %	70 %	87 %	30 %	10 %	63 %
rr	61 %	36 %	81 %	83 %	94 %	90 %	97 %	84 %	87 %	84 %	27 %	0 %	68 %

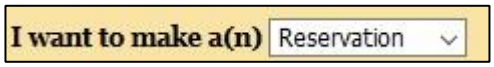
2014	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
RiverDance	39 %	55 %	72 %	88 %	95 %	90 %	82 %	90 %	78 %	94 %	82 %	55 %	76 %
tt	39 %	39 %	68 %	87 %	97 %	97 %	74 %	94 %	83 %	94 %	77 %	55 %	75 %
rr	39 %	71 %	77 %	90 %	94 %	83 %	90 %	87 %	73 %	94 %	87 %	55 %	78 %

The Internet Booking Engine allows your potential guests, any time, any where there is an internet, to directly make a booking that immediately shows up on your properties calendar as long as they have an internet connection. This ensures that your calendar is up to date all the time. So your customers can look at your real time availability and do the booking immediately. The easier you make it for customers to book, the more bookings will come your way. Asking customers to call you to determine availability, can leave them frustrated when they can't reach you, and more likely to look at other alternatives to your property. The **Internet Booking Engine** has four distinct versions:

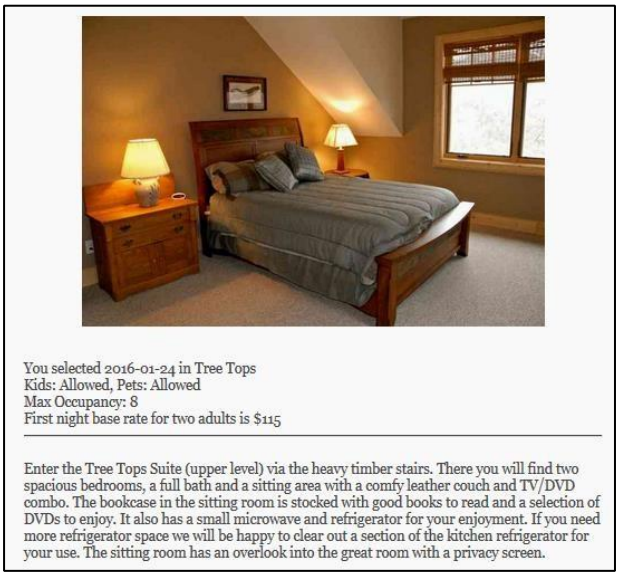
The first version is the one presented to **MakeRez** subscribers throughout much of the **MakeRez** itself. Part of it is resident in the **Contact Tab** and **Booking Info Tab** on the Guest page where customer demographics and information about their reservation are filled in and also in the **Workflow Tab** of the Guest page where we ask the system to actually make the booking. This is complemented by the Calendar page where we can actually see the effects of the new booking.

The second version uses the **Desktop Calendar Widget** which will be displayed on a desktop, laptop or tablet. It is embedded in the code for the Availability page on the website that features your property groups (like a bed and breakfast or a cluster of cabins that are managed together). The calendar is presented in a month at a time fashion with rows for each of the rooms/units/cabins in the property group.

For each date/unit combination there is a box. If that box has an X in then the unit is **NOT** available for that night. In the example below, the "Tree Tops" is available for Jan but not for Jan 14. The calendar can be moved to another month by selecting the < button (back one month), or the > button (forward one month), or the << button (back one year), or the >> button (forward one year). In addition there is a selection box for the month that allows you to choose the specific month you are interested in without moving one month at a time. The calendar will automatically update itself with the relevant guest information for that month.



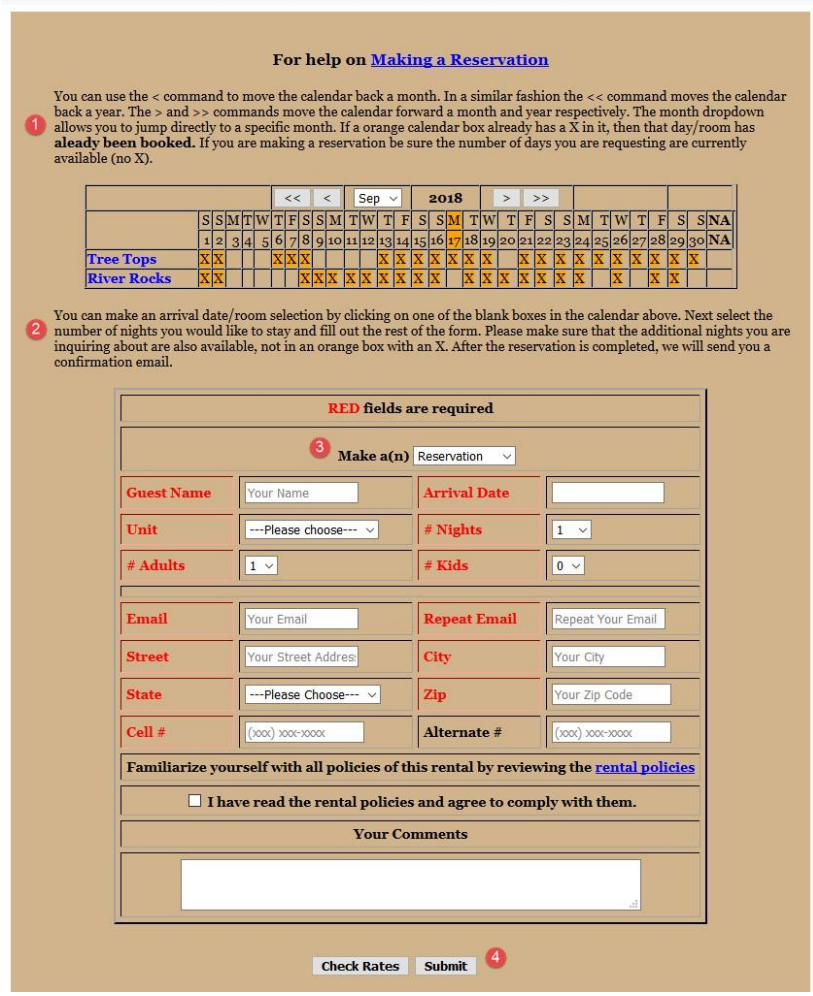
To make a Reservation: Make sure the selection box indicates you want to make a Reservation. A potential guest selects a specific unit and date for arrival by clicking on the appropriate empty checkbox. That specific date/unit combination in the calendar will turn blue to indicate it was selected. Next a dialog box will appear that verifies that the unit/arrival date combination that they want, in addition to providing information about the unit and whether children or pets are allowed. Also in the dialog box will be the maximum occupancy for the unit.



At that point the guest needs to fill out the rest of the required information in form below the calendar. The fields in Red are required for a reservation. The system will then validate that all the fields entered are in the right format, verify that the number of nights they have selected are indeed available in that unit and that this booking meets that minimum stay criteria for the arrival date that has been previous put into the minimum stay table. If all those tests work, a guest record in the database will be created, the reservation is made in the calendar and a confirmation email is sent to the guest.

To make an Inquiry: Make sure the selection box indicates you want to make an Inquiry. Here the potential guest needs to also fill out the form as above. The fields in Red are required for a inquiry. The system will then validate that all the fields entered are in the right format. If that test works, a guest record in the database will be created, and the inquiry will be emailed to you.

Comments: For an inquiry the comment field at the bottom of the form can be used to enter in the specifics of that inquiry. For a reservation it could be used to indicate special needs or requests.



For help on Making a Reservation

1 You can use the < command to move the calendar back a month. In a similar fashion the << command moves the calendar back a year. The > and >> commands move the calendar forward a month and year respectively. The month dropdown allows you to jump directly to a specific month. If a orange calendar box already has a X in it, then that day/room has **aleady been booked.** If you are making a reservation be sure the number of days you are requesting are currently available (no X).

<< < Sep 2018 > >>

	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	NA
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	NA
Tree Tops	X	X				X	X	X				X	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X	X		
River Rocks	X	X						X	X	X	X	X	X	X	X	X		X	X	X	X	X	X			X		X	X		

2 You can make an arrival date/room selection by clicking on one of the blank boxes in the calendar above. Next select the number of nights you would like to stay and fill out the rest of the form. Please make sure that the additional nights you are inquiring about are also available, not in an orange box with an X. After the reservation is completed, we will send you a confirmation email.

RED fields are required

3 **Make a(n)** Reservation

Guest Name	Your Name	**Arrival Date**	
Unit	---Please choose---	**# Nights**	1
# Adults	1	**# Kids**	0
Email	Your Email	**Repeat Email**	Repeat Your Email
Street	Your Street Addres	**City**	Your City
State	---Please Choose---	**Zip**	Your Zip Code
Cell #	(xxx) xxx-xxxx	**Alternate #**	(xxx) xxx-xxxx

Familiarize yourself with all policies of this rental by reviewing the rental policies

☐ **I have read the rental policies and agree to comply with them.**

Your Comments

Check Rates Submit 4

The third version is is the **Mobile Calendar Widget** which is embedded in your mobile website (phone) and is optimized to operate on cell phones. Similar in function to the desktop calendar widget, its main difference is in how much of the calendar is displayed (one week at a time versus a month at a time for the desktop). The controls (<,>) will move the calendar only by a week and the (<<,>>) controls will move the calendar by a month. You can also use the drop down month selection to choose a specific month to focus on. When you move to a new month, the week with the first of that month in it will be displayed.

Created Mon Sep 17 2018

Sep 2018 << < > >>

	M	T	W	T	F	S	S
	17	18	19	20	21	22	23
Tree Tops	X	X	X		X	X	X
River Rocks		X	X	X	X	X	X

The last version of the calendar is a “hidden calendar” that doesn’t expose the dates that your property is actually booked. It allows potential guests to check for the availability of specific stays as below. When the "Check Availability" button is selected, information about the units that are available are displayed.

The Guest Management Engine, Making sure the information you have about guests is correct is a critical piece in getting the most out of **MakeRez**. So you can freely change any of the fields that define a guest and their stay. If you change the booking information itself (arrival date, number of nights, number of people) you will first have to "unBook" the reservation by clicking on the "**Make Booking**" checkbox in the **Workflow Tab** to clear it and take the booking out of the system. Then make the changes, save them to the database with the "**Save Guest Information**" button. Finally use the "**Make Booking**" checkbox a second time to create the changed booking. A new confirmation email with the changes in it will be sent to your guest so they can confirm this new information.

TIP! After you change anything in an existing reservation that alters the calendar or put a new reservation on the calendar it is always a "best practice" to actually look at the calendar to verify the changes to it are there. Part of the MakeRez system is running on your computing device (**desktop, laptop, tablet, phone,**…) and part of it is running in the cloud. This requires frequent communication between the two parts and occasional this communication can be interrupted. Perhaps you have just gone out of cell phone data coverage, or your internet connection has an issue. Verifying calendar changes have been made properly is easy to do and avoids later problems. If your calendar is already displayed you will be looking at a version of the calendar that was valid when that page was originally displayed. To make sure it has the most current information you should move it back a month and then forward a month.

The **Search** page allows you to provide partial information for a guest (like a fragment of their name) and see what guests match that search. Once found, you can easily display the complete guest information for that guest on the Guest page. The **Calendar** page also has a "**Get Guests"** button. Selecting it will produce a listing of all the guests who are arriving at your property during that month. More information for each of those guests can be shown by selecting their line in the guest listing. The Search page is also used to select the folks you want to send out a custom email campaign to.

Reminders are notes in the system that "reminds" us to perform certain actions. The **Reminders Tab** on the Guest page lists any reminders that you have posted for this particular guest/inquiry. It may be a reminder to have them to make another payment, for you to contact them again to see if they have come to a final decision and want to book your property or simply to book a massage two weeks before their arrival. The **Dashboard** page lists all reminders that are past due and also ones that need to be completed in the next week.

Instructions

Reminders

You must go the the MR Utility page to maintain and update reminders

Id	State	Entered	Due	Guest Id	Unit	Description	Comments
14	p	2013-11-08	2014-01-24	206	rr	Get 2nd payment	$150
31	p	2013-11-21	2014-03-27	206	rr	Send birthday email	Dave

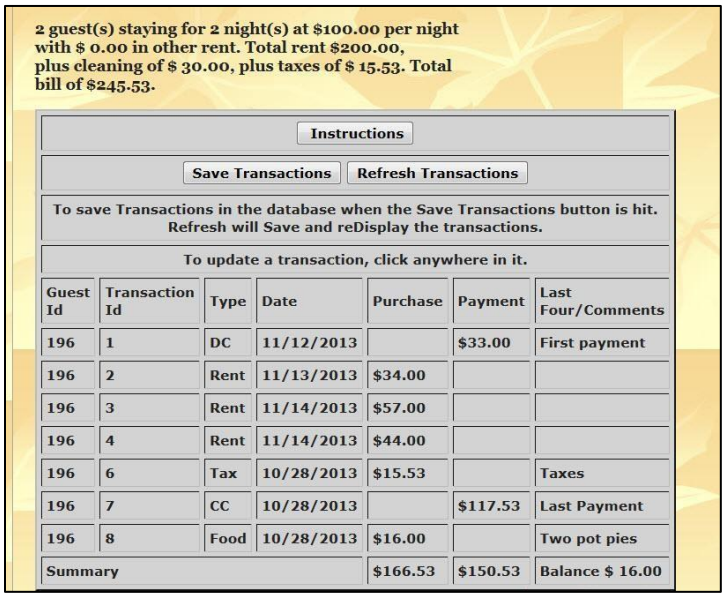
Reminders can be associated with a specific guest or, if the reminder has a guest id of 0, the reminder is not tied to a guest. It may be tied to a unit or the entire property. Non guest reminders could be something as simple as setting a reminder to place an ad in a local publication by a deadline, sign up for a business class or

even to schedule a window cleaning. Reminders include a system generated Id that is used to access them, a State value (pending or completed), the date the reminder was entered into the system, the date the reminder is due by, any guest id information that is associated with the reminder, any unit information associated with the reminder, description and any comments about the reminder.

The **Transaction Tab** on the Guest page can be used to keep track of detailed charge and payment information for your guests. Not only is this information useful to see what a guests balance is and to keep track of previous payments, it also forms the basis of the information that is used in the **Workflow Tab** to issue a receipt to a guest wanting a detailed listing of their charges and payments. The rent, cleaning and taxes transactions are automatically posted to the guests account each night of their stay. In addition, if authorize.net is used to charge a credit card for the initial deposit, that transaction is also automatically posted.

In the charge group the following types of charges are supported: **Rent, Food, Cleaning, Taxes, Other**

In the payment group we support the following types of payment: **Credit Card, Debit Card, Cash, Check and OTA Payment.** You can add additional payment methods.



2 guest(s) staying for 2 night(s) at $100.00 per night with $ 0.00 in other rent. Total rent $200.00, plus cleaning of $ 30.00, plus taxes of $ 15.53. Total bill of $245.53.

Instructions

Save Transactions | Refresh Transactions

To save Transactions in the database when the Save Transactions button is hit. Refresh will Save and reDisplay the transactions.

To update a transaction, click anywhere in it.

Guest Id	Transaction Id	Type	Date	Purchase	Payment	Last Four/Comments
196	1	DC	11/12/2013		$33.00	First payment
196	2	Rent	11/13/2013	$34.00		
196	3	Rent	11/14/2013	$57.00		
196	4	Rent	11/14/2013	$44.00		
196	6	Tax	10/28/2013	$15.53		Taxes
196	7	CC	10/28/2013		$117.53	Last Payment
196	8	Food	10/28/2013	$16.00		Two pot pies
Summary				$166.53	$150.53	Balance $ 16.00

Chapter 2 - Touring MakeRez

MakeRez consists of a number of pages that cooperate to provide the following services for your properties.

1. The **Dashboard** page provides a review of some of the important past and pending actions that **MakeRez** is involved with. It shows you reservations and inquiries that have been made in the last week. Dashboard also shows the last times **you** have backed up sensitive data, pending and past due reminders, and information about your occupancy rates and revenue projections. In addition you can review the automatic actions that MakeRez has taken on your behalf.

2. The **Guest** page is your primary way to enter data about a inquiry or guest and includes demographic information (name, address,...), phone information, booking information (arrival date, number of nights,...) and workflow information (booking confirmation sent, contract sent, ...). The workflow section of the **Guest** page allows you to actually make a guest booking, send a contract, record a gift card purchase and keep track of a variety workflow steps that help you understand how a guest/inquiry is in working with you. In addition, the **Guest** page also allows you to view the documents that have emailed to your guest (contract, welcome, thank you,..), reminders that you have created that are associated with this guest and also financial transactions, payments and purchases from their stay.

3. The **Calendar** page is your key resource in understanding your availability, and provides the ability to quickly jump from partial guest information (guest ID, number of guests,...) available within the Calendar page to the guest page containing full information for your guest. Please note that the actual booking on the calendar is normally done either through the Guest page described in more detail in Chapter 4 or through one of the Internet Booking Widgets described below.

   The **Internet Booking Engine** that is part of **MakeRez** allows guests to directly reserve units through your properties website at any time of day as long as they have internet access. Once an internet reservation is made, you may need to contact them to get their credit card and to gather other sensitive guest information. This internet booking capability has one component that works in a desktop or tablet environment and a mobile component that will allow direct internet booking from cell phones. The Internet Booking Engine can handle both reservations and inquiries and a field in the config table tells **MakeRez** when to offer just one of the two or both to your potential guests. Also if your config table indicates, when a guest makes a reservation, a charge on their credit card can be taken through authorize.net that will be deposited in your bank account.

4. The **Report** page helps you to understand all the valuable information that you have collected on your guests/inquiries and to use that information to more effectively market your property. Collecting good information is the key to this and the Guest page allows you to easily update and modify guest data as required. The Report page contains variety of reports ranging from a zip code map to help you understand where your customers are coming from to reports that look at yearly revenue and occupancy rates and compare them to past years.

5. The **Search** page allows you to look for guests/inquiries that match specific criteria, such as **guests who came to your property between May 30, 2015 and December 15, 2015 that also were from the state of Kentucky.** Searches are either based on guest/inquiry demographics, such as the one above, or on specific elements in the workflow (guests who are on your wait List). Another search that can be done is to look at the reminders and do a search based for reminders that match a specific criteria.

6. The **Admin** page provides the ability of MakeRez to be customized to more closely match how you run your business. Your business may run in a very different manner than that of another **MakeRez** customer. To that end, we try to have **MakeRez** adapt to you rather than forcing you to adapt to

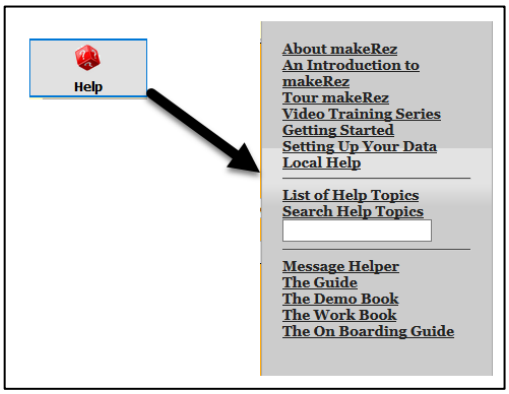
MakeRez. Some of the areas that can be customized include what rooms/suites/cabins you are managing and their specifics, how you want to handle minimum stay requirements, what sources of guests/inquiries are important and many more.

The data that you collect about customers and the email templates you can customize to communicate with them are your "crown jewels". It automatically keeps up to seven backup copies of both types of information.

As an additional security measure we recommend that you also periodically backup these two types of data yourself with tools from the **Admin** page. Those backups are actually stored on the computer system you use to access **MakeRez**. You can see more information on customizing MakeRez and using the Admin page to make sure your data is secure in the Chapter 9.

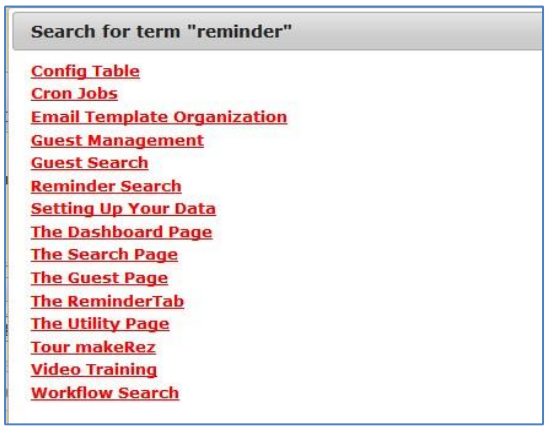
The Integrated Help System

Another important part of **MakeRez** is its integrated help system. To help you understand its features and functions, all of the **MakeRez** pages give you access to an **Instructions** button. The help system will describes the working parts of **MakeRez** and assists you in getting the maximum value from using it. There is also a help pane available from the top level menu buttons that covers most of the important help topics.



You can enter the help system by working through the Help Pane above by selecting one of the topics like "About MakeRez" or by selecting the "**Instructions**" button that is present on most of the **MakeRez** pages. Once a help topic, like "**The Search Page**" is selected, a help dialog like the one below will be displayed. In the help dialog are several features that assist you in navigating around the help system. First there are phrases that are presented in **red**. Those phrases are actually links to another help topic with more detailed information on that phrase. Clicking on those **red** links will jump to that new help topic. In addition you will often see left pointing and right pointing arrows displayed at the bottom of the help dialog. These operate much like the back and forward button in your browser to easily move you to previously viewed help topics.

You can also list all the available Help Topics to peruse what information is available in the help system by selecting "**List of Help Topics"** in the Help Pane. That will show a tabular list of all the help topics in **red**, and clicking on one of them will take you to that specific help topic. You can use the "**Search Help Topics**" function by typing in a phrase or word in the box below it, selecting the "**Search Help Topics**" function which will display any Help Topic that contains that phrase in its text. So if you were looking for information about how MakeRez uses reminders, you would type the word "reminder" and do a search on it. The capitalization of the word does not matter. A list of the help topics that match the search will be displayed:



If you click on one of the topics in the list, say the **Guest Search** topic, the help system will display the topic with the word "reminder" highlighted in yellow.

Finally there is a "**Video Training Series"** that will show how to do a range of important functions in MakeRez and will also take you on a tour of the each of the MakeRez pages.

Local Help

In addition to the information that MakeRez provides to help you understand its operation, it also gives you the option to extend the help system to add in help topics that are specific to your business. In the help pane displayed above you'll notice the "Local Help" term. That is the entry point for folks to get to the topics that are specific to your business. There is more information in the Appendixes on how to set up and use the Local Help capability.

Chapter 3 - System Jobs

The **MakeRez** system performs a number of tasks on a specific schedule that provide a variety of services to subscribers. Those jobs are:

mrCronAutoEmail, primary focus is marketing. The system will automatically send out a number of email messages to your guests based on timing you set up in the config table.

- **The Welcome email** is sent out a number of days before their arrival and provides your guest detailed directions on how to get to your property, any access information they will need upon arriving, information about check in times, your contact information and information about local restaurants, attractions, grocery stores, things to do in the area, ... that they might want to visit before arriving or during their stay.
- **The Thank You email,** is sent out a few days after their departure. This email is a great vehicle to show your appreciation for them visiting your property, perhaps to mention a special offer for returning guests and should also include something like the **RiverDance Portfolio** mentioned above with a specific request for them to forward it to others, along with their recommendations, to folks in their life that might be interested in visiting your property. This is also a good place to ask them to write a review and provide them with convenient links to make that easy.
- **The Reminder email,** when the anniversary of the guest's last visit is nearing, raise the visibility of your property, as they might be planning another vacation. The reminder email would also be a good place to let folks know about any events that are coming up in the area or any special offers that you and your partners may be running.
- **The ExtendAStay email** is sent out a number of days before their arrival if there are openings for the unit they are in either immediately before or after their stay. Those days would be offered to them to extend their stay, perhaps even with a special offer.
- **The Recontact email** is a way to have the system help you to recontact potential guests who haven't quite yet made up their minds about staying at your property. From the **Workflow Tab** on the Guest page you can put a guest on your recontact list. That immediately sends out a standard recontact email based on the recontact email template. In the config table you can set when and how many times a potential guest should be recontacted. You can even setup a series of different messages (recontact0, recontact1, …) to use for the various recontact attempts. When the last recontact email is sent out, the potential guest is moved to the "retired" list and no more recontact attempts will be made. If the guest eventually does reestablish contact and book with you, the act of making the booking in the Workflow Tab will take them off both the recontact and the retired list. ○ **cancel workflow** - When you cancel a reservation for a guest(by un checking the Make Booking box and checking the Cancel Reservation box), they are immediately sent an email confirming the cancellation. Also additional emails will be immediately sent out to ask the guests on either side of the cancellation if they would like to extend their stay, perhaps by including a special offer. If the adjacent reservations are more than three days away from the cancellation, no email will be sent. In addition prospective guests that have been added to the wait list whose possible arrival dates are close to the cancellation are also emailed about the new opportunity to book.
- **inquiryReminder** - Hopefully most of the folks that inquire at your property will go ahead and book a stay. But some, whose guest data you have entered into the guest management portion of MakeRez, may not be able to book for a variety of reasons. Perhaps you had no units, or they were unable to take the trip they planned. **MakeRez** has the ability to send an **inquiryReminder** email to those folks to invite them to try to visit you again.

Inquiry Processing

HomeAway, airbnb and FlipKey both act as online travel agents (OTA's) where their business model relies on them collecting a commission for the booking. That requires that they control the transaction (at least until the booking is actually made and the customer makes either a deposit of the full payment for their visit). This limits the information a potential guest will see to just what is displayed on the OTA page. And as time sensitive as inquiries are there is no guarantee that we will see them quickly since they may come in while we are asleep, or in an environment where we simply aren't checking our cell phones frequently.

The longer we wait to get back to that potential guest with more information, the more likely that they will move onto other possible lodging choices and make their reservation there. While it may be impossible to more quickly see the questions the potential guest is asking and specifically respond to that question, wouldn't it be better to quickly send some type of response back that acknowledges their inquiry and provides additional, relevant information back to the customer that gives them a host of reasons to more strongly consider your property?

Fortunately that is possible to do using the standard tools provided with having a gmail account today. Following is a step by step procedure to use MakeRez to respond immediately to those inquiries without you having to lift a finger.

First let's look at how the whole process will work. The key is to setup a new MakeRez email account that will help you quickly process those inquiries and get ahead of the other folks. You will use that account as the email account you ask airbnb, HomeAway, FlipKey and your direct website to send communications to. The first thing the account will do on receiving a new email is that it will immediately (no time lag) forward that email to the normal email account you use today to monitor communications from these services so you can act on it in your normal fashion. So you will see that email just as fast. Next the MakeRez account will use what are called filters to detect that this particular email is an incoming inquiry from one of your booking services (direct, airbnb, HomeAway family, FlipKey). Once that filter detection happens a "canned message" is automatically sent back to the potential guest.

All this happens in seconds. So you get the original inquiry in your normal email account and use the standard tools from airbnb, HomeAway family, FlipKey to respond to the inquiries questions. It is important to respond through their tools because that allows them to monitor how quickly you are responding and that may have an impact on your rankings with them. The potential guest gets an immediate response through your gmail process with interesting information about your property and as quickly as possible you manually send them back a response answering their question(s)

The Weekly Report

mrCronWeeklyReport, primary focus is keeping you informed. The weekly report is a superset of the data that is presented on the Dashboard page in **MakeRez**. It is sent out via email once a week to each subscriber and provides a synopsis of some of the key operating metrics of your property. In the following example the emails and phone numbers have been taken out to protect our guests privacy.

MakeRez Weekly Report for riverdancenc
2015-09-06

Reminders	Backup Status
There are 7 overdue reminder(s) and 0 reminder(s) due in the next 7 days	Last user database backup at 2015-08-01 Last user email backup at 2015-08-01

Twelve Month Occupancy Summary

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2015
RiverDance	48%	35%	72%	71%	90%	86%	94%	73%	75%	80%	26%	4%	62%
tt	38%	35%	64%	60%	87%	83%	93%	64%	70%	87%	26%	9%	59%
rr	58%	35%	80%	83%	93%	90%	96%	83%	80%	74%	26%	0%	66%
Cottage	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Twelve Month Revenue Summary

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2015
RiverDance	$3,152	$2,407	$5,379	$6,243	$7,540	$6,335	$8,050	$5,725	$5,250	$6,585	$2,335	$345	$59,346
tt	$1,360	$1,092	$2,497	$2,575	$3,605	$3,030	$3,825	$2,685	$2,415	$3,660	$1,140	$345	$28,229
rr	$1,792	$1,315	$2,882	$3,265	$3,935	$3,040	$4,225	$3,040	$2,835	$2,810	$1,195	$0	$30,334
ms	$0	$0	$0	$403	$0	$265	$0	$0	$0	$115	$0	$0	$783
Cottage	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0

New Inquiries in the Last Week

Id	Name	Arrival	Cell #	EMail	Adults.	Kids	Prop.	Nights
3123	Kimbra	2015-09-15			2	0	tt	1
3126	Julia Vanderput	2015-12-29			4	2		2

New Reservations in the Last Week

Id	Name	Arrival	Cell #	EMail	Adults.	Kids	Prop.	Nights
3117	Karen Williamson	2015-09-01			2	0	rr	1
3118	Trish Perkins	2015-10-19			2	0	tt	2
3119	Chelsea Korte	2015-09-23			2	0	tt	1
3120	P. J.Barrett	2015-10-21			2	0	tt	1
3121	Janet Hutchinson	2015-10-25			2	0	rr	2
3122	Sarah Szymanski	2015-10-05			2	0	rr	3
3124	William Osterbur	2015-09-25			4	0	rr	1
3125	Chad Ricker	2015-09-04			2	0	tt	1
3127	Jensen Webb	2015-09-14			2	0	tt	2
3128	Dale Klitzke	2015-09-09			2	0	tt	1

mrCronNightly, **primary focus is making sure your data is secure.** Every night **MakeRez** makes a copy of all your sensitive data including your database and the email templates used in the system generated and subscriber generated emails. **MakeRez** will store the last seven days worth of backups on the server and one backup a week for the five weeks before that. In addition you have the capability of using the **Admin** page to do a user created backup for both the database and the email templates and have the backups stored on your local computer. mrCronBackup is also responsible for checking the integrity of the database, doing a monthly roll of both the logs of the cron jobs, and the database log table. Finally it is also responsible for posting nightly transactions for rent, cleaning and taxes to the guests record.

Chapter 4 - The Guest Page

The **Guest** page has a number of control buttons aligned across the top of the page that are used to perform important actions.

- Selecting the **Save Guest Information** button actually takes the changes to the guest information that you have been temporarily making and copies them to your **MakeRez** database for permanent storage. It's important to **always save those changes** before moving on or exiting the **MakeRez** application. If MakeRez detects you may loose unsaved changes, it will remind you to save them.
- The **New Guest** button sets up **MakeRez** for entering in information from a new inquiry/guest.
- The **Get Guest** button is used in conjunction with the field next to it to bring up the guest information for a previous inquiry/guest when you know the Guest Id (confirmation number) for the guest. If you don't know the guest number, the Search functions of **MakeRez** can be used to track down the Guest Id for a specific inquiry/guest.
- The **Duplicate** button takes an existing reservation/inquiry and copies the contact information to set up another reservation. This is useful if you have folks that are returning for another visit, you can simply retrieve their guest information as described above and then select the Duplicate button to copy it into a new guest record, eliminating the need to reenter the information. Duplicate can also be useful if a single group is making multiple reservations at your property.
- Selecting the **Instructions** button will produce help for this page.
- You can use the **Delete Guest** button to delete guest records if it is allow in the config table. To be deleted, a guest must be not be booked. If they are, you must first unbook them. If the Delete Guest button is grayed out, it indicates the config table is set up to not allow a guest to be deleted.

In addition there is a Search button next to the Guest Name field that allows you to quickly search for previous reservations for this guest. If they are found, a dialog box will be displayed and the previous contact information can easily be transferred into the new reservation.

Guest Contact Info

The **Guest** page is segmented into a set of tabs that indicate the type of information that they contain. The guest/inquiries name and email address are labeled in **RED** and are required to be able to save any information into the database. The fields labeled in **BLUE** are required before a booking can be made, while the fields labeled in **BLACK** are either optional or supplied by **MakeRez** itself (like the contact date).

TIP!

If you hover the mouse over some of the labels within the Guest page a short popup description of what those fields do will be displayed.

- The **Contact Info Tab** has name, mailing address, phone and email address information (**all required for a booking**). Special care should be taken to make sure the zip field is correct since it is used in the Zip Code Map report to show geographically where your customers are coming from. In addition this tab also has a Notes and Actions field. Notes are information that is typically about the guest themselves (**dietary** preferences,...) and are copied over from a previous reservation when the duplicate button is used. Actions are an audit trail of things that have happened to the guest

information since the guest was originally put in the database. This might be changes to the guest city, that fact a booking was made,....

- The **Booking Info Tab** has information about the booking itself (arrival date/time, number of nights stayed, unit they are staying in), makeup of the guests party (number of adults, number of children) and information about (if relevant) the source of the lead, the occasion, and any special promotion they are taking advantage of.

Rate Info

The rate table provides flexibility in setting the rates for your property. Rates can vary by season (Winter, Spring, Summer, Xmas) as in the example below, in addition to varying by the day of the week. Rates can also be subject to (if appropriate) a one night surcharge, a surcharge for 3-4, or 5-6 adults in a unit, or a length of stay discount. Rates are also associated with a property class (like Jr Suite) that is kept in the property table for each unit. Let's look at how **MakeRez** would determine what rates to use for a two person, two night stay starting on July 4th, 2015 in a unit classified as a Jr Suite. First it would find the part of the rate table that deals with the "Jr Suite" rate class. In this case that is started by the rate table header with Index = 1. Next it would isolate the particular season (or seasons if the stay spanned multiple seasons) corresponding to July 4th and 5th 2015 which would be the rate entry with Index of 14 and the season called "**Prime 2015**". Since for that rate entry has no day of week variation the base rental rate for two people for those two days are $115 + $115 = $230.

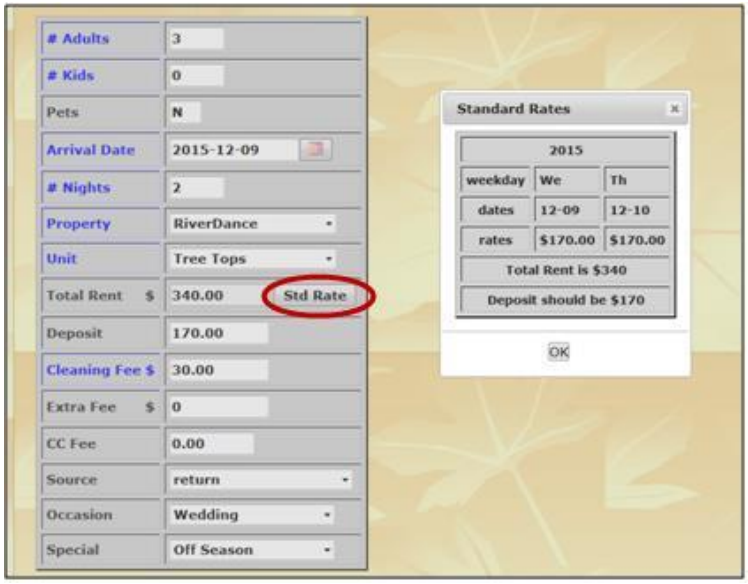
Rates can also be modified by looking at the number of adults that are staying and the number of nights that they are staying. These parameters are all associated with the property group and can be found in its description.

This table has two types of records. The header entries designates the rate classes (Suite, Jr Suite) that the next set of rates (the rate group) are for. Up to six rate classes can be defined in one rate header. If two rate classes have different rate seasons or rates themselves, they must be separated and each have their own rate group and rate header. The first entry in the header is a default rate for the rate classes if no subsequent rate season covers the reservation. The rate group details the rate seasons that are tied to that rate header. So in this case the rate seasons with Index of 3,12,13,4,14,17 make up the rate group. Rate seasons have an id, name, sort order, start and an end date, along with the rate specification on a per day basis through the week. The SortOrder is used to tie the rate seasons in the rate group to the rate header. When the whole table is sorted, the rate seasons in a rate group sit underneath their rate header.

Index	SortOrder	Season	Start Date	End Date	Mo	Tu	We	Th	Fr	Sa	Su
1	5	Rate Class	0000-00-00	0000-00-00	115	Jr Suite	Suite				
3	10	Winter 2014	2014-01-01	2014-02-27	115	115	115	115	135	135	115
12	12	Prime 2014	2014-03-01	2014-11-30	150	150	150	150	175	175	150
13	14	XMas 2014	2014-12-01	2014-12-31	150	150	175	175	175	175	150
4	16	Winter 2015	2015-01-01	2015-02-27	115	115	115	115	115	115	115
14	18	Prime 2015	2015-03-01	2015-11-30	115	115	115	115	115	115	115
17	20	Xmas 2015	2015-12-01	2015-12-31	115	115	115	115	115	115	115
10	100	Rate Class	0000-00-00	0000-00-00	200	Cabin					

One example of using the rate table above would be to calculate the daily rates for two people staying in a jr suite from Thursday Dec 25th to Tuesday Dec 30th in 2014. First, **MakeRez** would look at the table and determine what rate class the jr suite belongs to. In fact it belongs to the rate class with sort Order of 5 that has a default rate of $115/night. Next **MakeRez** will determine that that desired stay falls within the Xmas 2014 season. For that season a Thursday stay is $175, as is the Friday and Saturday stay. The Sunday and Monday stay would be $150. Rates can be adjusted based on weekly or monthly discounts, or if more than

two people staying in the unit. The standard rates are calculated when the actual booking is made and each nights rate is inserted into the guests booking record for that night. The **Booking Tab** allows you to view the standard rates by selecting **the Std Rate** button.



Sample Booking Tab

Guest Workflow Info

The **<u>Workflow Info Tab</u>** helps to partly automate many of the time consuming tasks involved in moving a potential guest through the reservation process and helps to guide you in what steps may be next. The workflow process can be extensively customized to more closely match the model of how your properties operate.

Here is an example of how the Workflow information is used: Suppose you have been discussing availability and the benefits of your property with a potential guest and they have decided to book. After entering in the booking information in the **Booking Info** tab, you will need to select the **Save Guest Information** button to actually save those changes into the database. Next you should go to the **Workflow Info** tab and select the **Make Booking** checkbox. That will cause the actual booking to be placed on your calendar in addition to a **Booking Confirmation** email to be sent to your new guest and copied to you. These actions take a few moments to happen, so patience is required. You will be notified via a popup when the calendar has been changed and the email has been sent. When the booking is made, the calendar will update itself to display the changes. **It is always a best practice to verify the calendar change by taking a quick peek at your calendar.**

Sample Workfow Tab

Workflows are the various actions that may happen as a inquiry/guest moves through **MakeRez**. They can be uniquely defined for your property in the **Admin** page. Workflows typically have an action associated with them such as generating an email or simply recording the fact that a workflow happened. The round icons next to each workflow represent the type of action defined for that workflow.

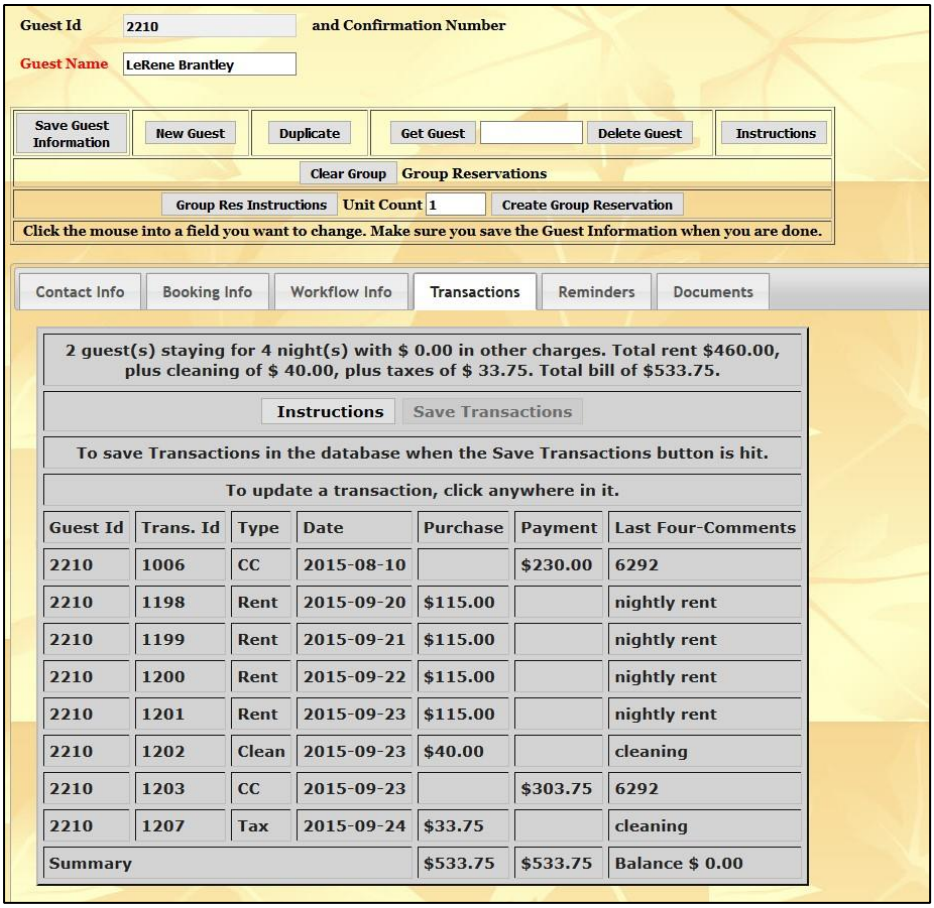
Many workflows involve generating an email to your guest that contains important information about their stay. So for example, the **Make Booking** workflow step will cause both the new booking to be placed on the booking calendar in addition to sending out an email with the specifics of their stay for them to review and verify. The Make Booking step also records, in the database, the **totalRent** and the **deposit** that are displayed within the **Booking Info** Tab. Emails that the system sends out as part of the workflow process are automatically saved and visible on the **Documents** tab within the Guest page. Workflows that have a round email icon will send those messages to your guest as part of the workflow.

The workflows that have the round checkmark icons simply record specifics about this inquiry/reservation that you can typically search for later with the **Search** tab. A classic example of this is that an inquiry really wants a specific set of dates that you don't currently have available. As a result, you put them on your wait list by checking the waitlist workflow step. Later on, if you process a cancellation, the system will check folks who are on your wait list to see if the cancelled dates might work for them. Another way to use the wait list would also be to gather the prospective guests that have been on your wait list over a specific frame and to send a special offer to them to entice them to visit.

TIP!

The **Paid In Full** workflow simply records when a guests bill has been fully paid. Unfortunately in these days of folks like HomeAway/VRBO, Airbnb,… full payment to you of the guests bill often occurs after the guest has arrived or even after the guest has departed. The dashboard page has an alerting mechanism to let you know which guests need to make their final payment. So setting this workflow to "Y" makes sure that this guest does not appear in the alert. For example, the guest reserves through Airbnb, so the payment will come on the day after the guest arrives. But since your sure that Airbnb will forward the money to you it is safe to mark this guest as **Paid In Full** so they do not appear in the alerts. You would also mark guests that book directly with you as **Paid In Full** after you take their final payment.

One of the standard workflows you can initiate is one that will generate a receipt for a customer and email it to them. But what to do if the customer wants a printed copy in their hand when they leave? First make sure you have completed the entry of their final transaction (probably with their credit card) into their transaction tab. Then you can simply print out their transaction tab through your browsers print function to create a receipt like this.



The thirteen workflow steps listed above are part of the standard **MakeRez** installation. There are four additional custom workflow steps you can access through the **Workdef Tab** of the **Admin** page to create other workflows that include emails to your inquiries/guests or assign them to lists you can search.

One potential custom workflow would be if your property was used as a wedding venue. You could then create a wedding workflow step, probably just as a list, rather than with an associated email. With that in place you could enter in the brides demographics, phone info, info if they booked units at your property in addition to reminders about the wedding, notes about the wedding, and financial transactions about the wedding. For more information about custom workflows go to the **Video Training Series** and watch the "**Creating** a Custom Workflow" segment.

Over-Riding the Standard Rates

When the **Make Booking** checkbox in the **Workflow Tab** is used to make a booking, the system calculates what the standard rates are for your guest. It does that by grabbing the rate information out of the rate table that corresponds to the rate season, the day of the week, the number of adults and the length of your guests stay. The Standard Rates can be displayed even before the booking is made as described in an earlier section on the Rate Table. After the booking is made, you can select the **Over Ride Rates** button in the Workflow tab. That will display the rates that were actually entered into the booking records for the guest in the database

Rates for guest # 282				
Over Ride				
weekday	Th	Fr	Sa	Su
dates	2015-12-09	2015-12-10	2015-12-11	2015-12-12
rates	175.00	175.00	175.00	175.00

If you have a need to over ride the standard rate calculations (perhaps someone else is staying with the guest for part of their stay or the guest is taking advantage of one of your specials), you can make those changes to the rates and then select the **Over Ride** button to actually make the change in the database. That will update the **totalRent** and **deposit** fields that appear on the **Booking Info** tab.

Actions

The system keeps track of actions that happen to a particular guest/inquiry after it was originally made. This allows you to track when and by who those changes were made. Below is a example of some actions that were taken on a guests behalf when they wanted to change their arrival date and while that change was begin made it was noticed that their city was spelled wrong.

12/29/2015 4:57:36 PM: booking made on calendar by wellendorf_dave@yahoo.com
12/29/2015 4:57:03 PM AM: arrivalDate changed from 2016-04-07 to 2016-12-06 by

wellendorf_dave@yahoo.com
12/29/2015 4:56:24 PM: city changed from Vincennes v to Vincennes by wellendorf_dave@yahoo.com

12/29/2015 4:55:53 PM: booking taken off the calendar by wellendorf_dave@yahoo.com

Guest Transaction Info

Also located on the Guest page, the **Transactions Tab** data can detail the purchases and payments that your guests have made. This is an optional process, but would be considered a best practice to make sure that guests are being billed properly and that you are able to give them an accurate receipt It also offers a central place to keep track of payments that may have come in at different times. In the absence of transaction data for a guest, the transactions tab gives an overview of the financial part of a guests stay. This is an example of how the summary looks:

2 guest(s) staying for 2 night(s) at $100.00 per night with $0.00 in other rent. Total rent $200.00, plus cleaning of $30.00, plus taxes of $15.53. Total bill of $245.53

As part of the standard nightly processing done by MakeRez, rent transactions for the current night and cleaning and tax transaction for the day of departure are automatically posted.

2 guest(s) staying for 2 night(s) at $100.00 per night with $ 0.00 in other rent. Total rent $200.00, plus cleaning of $ 30.00, plus taxes of $ 15.53. Total bill of $245.53.

Instructions

Save Transactions | Refresh Transactions

To save Transactions in the database when the Save Transactions button is hit. Refresh will Save and reDisplay the transactions.

To update a transaction, click anywhere in it.

Guest Id	Transaction Id	Type	Date	Purchase	Payment	Last Four/Comments
196	1	DC	11/12/2013		$33.00	First payment
196	2	Rent	11/13/2013	$34.00		
196	3	Rent	11/14/2013	$57.00		
196	4	Rent	11/14/2013	$44.00		
196	6	Tax	10/28/2013	$15.53		Taxes
196	7	CC	10/28/2013		$117.53	Last Payment
196	8	Food	10/28/2013	$16.00		Two pot pies
Summary				$166.53	$150.53	Balance $ 16.00

The Transaction page can be used to keep track of detailed charge and payment information for your guests. Not only is this information useful to see what a guests balance is and to make sure all the charges have been paid for, it also forms the basis of the information that could be used in the Workflow Tab to issue a receipt to a guest wanting a detailed listing of their charges and payments.

To Add a New Transaction

If the guest you are working with has no transactions defined, the transaction tab will display the template for a new transaction that you can edit to create the first transaction for the guest. To do this, add the information to the transaction template and select **Add a Transaction**. If the guest already has transactions defined, then select one that to use as a template by clicking in its row. Make the desired changes and finally select **Add a Transaction**.

To Edit an Existing Transaction

Select the transaction you would like to change by clicking in its row. Make the desired changes and finally select **Update this Transaction**.

To Save Changes Made to the Transactions

If you have added new transaction or edited existing ones, make sure you select Save Transactions to permanently save your changes to the server. In the charge group the following types of charges are supported:

- **Rent**
- **Food**
- **Cleaning**
- **Taxes**
- **Other**

In the payment group we support the following types of payment:

- **Credit Card**
- **Debit Card**
- **Cash**
- **Check**
- **OTA Payment**

Guest Reminder Info

The **Reminders Tab** lists any reminders that you have posted for this particular guest/inquiry. It may be a reminder to have them to make another payment, or for you to contact them again to see if they have come to a final decision and want to book your property. Reminder for a specific guest can be added, modified and deleted from within the Reminders Tab. Reminders that are tied to the property itself (the Guest Id is 0), like register for a marketing class, are not assigned to a guest and can be viewed in the Admin page. In addition the **Dashboard** page simply lists all reminders that are past due and also ones that need to be completed in the next week.

Instructions

Reminders

You must go the the MR Utility page to maintain and update reminders

Id	State	Entered	Due	Guest Id	Unit	Description	Comments
14	p	2013-11-08	2014-01-24	206	rr	Get 2nd payment	$150
31	p	2013-11-21	2014-03-27	206	rr	Send birthday email	Dave

Reminders include a system generated Id that that is used to access them, a State value (pending or completed), the date the reminder was entered into the system, the date the reminder is due by, any guest id information that is associated with the reminder, any unit information associated with the reminder and finally a description and comments about the reminder. Reminders appear in a variety of places throughout **MakeRez**.

- Reminders are created, deleted, edited and marked as complete on the **Reminders Tab** of the **Admin** page. ○ Reminders can be searched for using the **Reminder Search Tab** on the **Search** page. Criteria to search for reminders include the guest id the reminder is associated with, whether the reminder is pending or completed, the date ranges that the reminder was entered or date ranges that the reminder is due by, or by specific words in the descri[tion of the reminder.
- The **Dashboard** page provides a review of what reminders are pending in the next week and also what reminders are overdue.
- Reminders for a particular guest can also be viewed, created, edited, deleted in the **Reminder Tab** of their **Guest** page.

Chapter 5 - The Calendar Page

The MakeRez **Calendar** page is displayed for a month at a time with all the days laid out in a row wise fashion. The numbers in each of the squares indicate how many people will be occupying that unit. This display is for our bed and breakfast/vacation rental combination called "**RiverDance**". There are two active cabins at RiverDance. Tree Tops and River Rocks which can have up to six people. The date/cabin combinations that have an orange box around them show a turnover day where guests are leaving and new guests may be coming in. We give our cleaning service read only access to this calendar and they are expected to set their schedule to meet its needs. If we have a last minute change, then we will notify them with a text message.

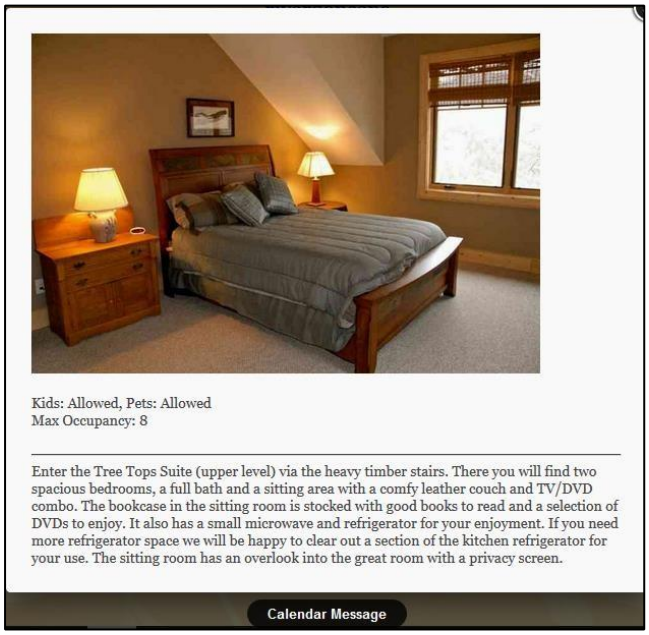
At the right of the calendar itself it gives a quick synopsis of how many nights this month have been booked for that particular unit. Also note that since the calendar changes frequently, the date this calendar was created is also given.

Created Tue Nov 03 2015

<< < Oct 2015 > >> Get Guests X-->turnover

	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Tree Tops	_	4	4	4	2	2	6	6	6	6	2	2	3	_	2	4	4	4	2	2	2	6	6	6	2	2	2	2	5	5	5	29 nights booked
River Rocks	_	6	6	6	2	2	2	2	2	2	2	6	2	2	2	2	2	2	1	2	2	2	2	2	2	2	2	2	2	2	2	30 nights booked
Master	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	_	2	_	

You can use the since < and > to move the calendar one month into the past or future respectively and the double << and >> are used to move the calendar one year into the past or future. You can also use the drop down select box, currently with Nov in it to move directly to a specific month. Because of its width this calendar is easiest to view on desktops, laptops or tablets. While not yet optimized for cell phones, by using landscape mode and a little bit of scrolling, it is also perfectly usable. If one "hovers" with a mouse over a particular unit/date combination, the calendar will show you the guest id of the party occupying that unit. By clicking on that unit/date, the **MakeRez** system will bring up the full guest information for that group in the **Guest** page. There is a separate calendar with less information that is embedded in your property website and this calendar has both a desktop and a mobile configuration. In addition the names of the units, in this case River Rocks and Tree Tops, can be clicked on to get more information about that unit. For example, clicking on Tree Tops produces the following display:



Putting Units out of Service: There is often a need to block off units when they are out of service. Whether it is for painting, renovation or perhaps while the property is going to be closed during your vacation. The way that is done is to make a **reservation** in your name for the unit(s) for the duration of the service outage. To help **MakeRez** handle things appropriately please make sure you include a zip code of 000000 in the reservation and the rate you have listed in the reservation is 0.00. This will help ensure that all the reports will ignore these reservations.

If you select the **"Get Guests"** button, **MakeRez** will display all the guest groups that will be occupying the units for the given month in a list like the one below. The same "**Get Guest**" style information is available for a week at a time by clicking on a specific day number (say on the 21 that represents July 21) in the calendar.

Get Guests List

Id	Name	Arrival	State	Cell #	Email	Adults	Kids	Pets	Prop.	Contact Date	Nights
787	Danny Purvis	2013-10-31	SC			2	0	N	rr	2013-05-31	3
906	Molly Petsch	2013-11-03	OH			2	0	N	rr	2013-09-18	2
891	Monica Kenton	2013-11-05	NC			4	0	N	rr	2013-09-11	3
867	Stacey Gilliam	2013-11-08	TN			4	0	Y	rr	2013-08-20	2
871	Darlene Weisskopf	2013-11-10	NC			2	0	N	rr	2013-08-06	1
925	Sam Henley	2013-11-14	SC			3	0	N	rr	2013-10-14	1
870	Gary and Jodi Snider	2013-11-15	NC			2	0	N	rr	2013-08-22	2
952	William McDowell	2013-11-18	VA			2	0	N	rr	2014-03-26	2
927	Phyllis Workman	2013-11-21	IN			4	0	N	rr	2013-10-17	3
941	Roman Gau	2013-11-24	GA			2	0	N	rr	2013-11-07	2

21 row(s) returned

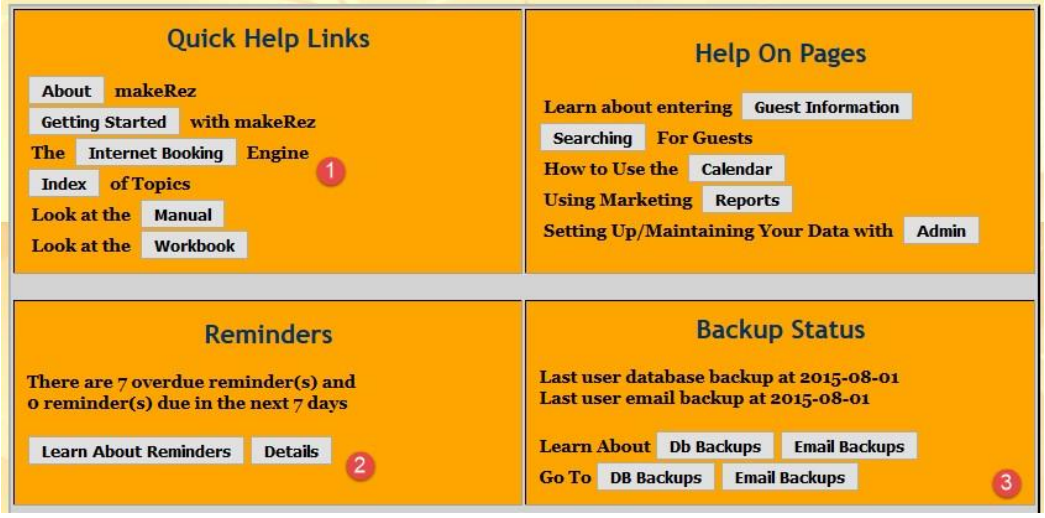
1 to 10 of 21 rows Rows/Page 10

Normally the Get Guests list will display both the cell phone # and the email address of the groups contact, but with have eliminated them in this graphic because of their personal nature. By clicking into a specific row, you can again bring up the full guest information for that guest group in the **Guest** page. Since the guest list maybe very long we choose only to display 10 of them at a time, although you can easily change that up to 50. Also to make things easier to find you can sort the display by any of the columns (Id, Name, Cell #,...). As you hover over a specific row in the Get Guest list, the corresponding dates in the calendar itself will change to red so it is easy to visually understand your occupancy.

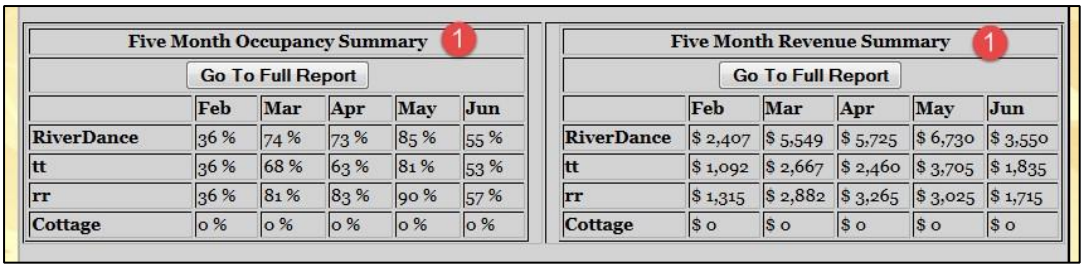
Chapter 6 - The Dashboard Page

We just logged into the MakeRez system and the dashboard has been displayed. What information about our property is available there?

The **Dashboard** is the first page that is displayed when you log as an subscriber into **MakeRez**. The dashboard is designed to bring a lot of information into one place that can give you a quick overview of its operations and of key metrics that can help you understand the operation of your property. Some of the areas the dashboard focuses on are:



1. Quick links to important help topics that will aide you in understanding how **MakeRez** can be used to enhance your properties operation and "**Get more heads in your beds**".
2. An overview of **Reminders** that are overdue and probably need your attention in addition to **Reminders** that are due in the coming week.
3. The **MakeRez** system takes responsibility for making a number of backups of both your database and your email templates and storing them on the web server. It is always a good idea for you to periodically use the **Admin** page to make a database and email template backup yourself. In that process the backups are actually stored on your local computer. Since your data is in essence the "crown jewels" it needs to be well protected and having it in several different places is important. Occasionally it is also a good idea to make another copy of the database and email template backups and put them up on a "cloud" storage service like box.net for added security.



Five Month Occupancy Summary 1

Go To Full Report

	Feb	Mar	Apr	May	Jun
RiverDance	36 %	74 %	73 %	85 %	55 %
tt	36 %	68 %	63 %	81 %	53 %
rr	36 %	81 %	83 %	90 %	57 %
Cottage	0 %	0 %	0 %	0 %	0 %

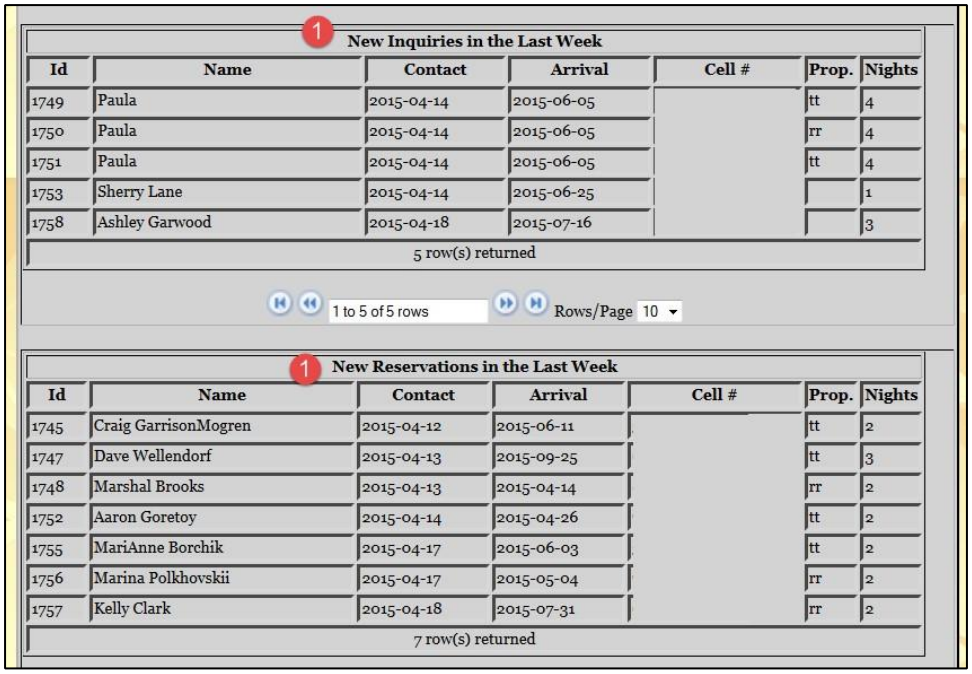
Five Month Revenue Summary 1

Go To Full Report

	Feb	Mar	Apr	May	Jun
RiverDance	$ 2,407	$ 5,549	$ 5,725	$ 6,730	$ 3,550
tt	$ 1,092	$ 2,667	$ 2,460	$ 3,705	$ 1,835
rr	$ 1,315	$ 2,882	$ 3,265	$ 3,025	$ 1,715
Cottage	$ 0	$ 0	$ 0	$ 0	$ 0

1. An overview of what your current **occupancy** rate and **revenue** numbers are for the current month along with two months before and after the current month. The numbers for the current and future

months will obviously change as you get additional reservations, but these two tables give you a quick snapshot of your operation.



1 New Inquiries in the Last Week

Id	Name	Contact	Arrival	Cell #	Prop.	Nights
1749	Paula	2015-04-14	2015-06-05		tt	4
1750	Paula	2015-04-14	2015-06-05		rr	4
1751	Paula	2015-04-14	2015-06-05		tt	4
1753	Sherry Lane	2015-04-14	2015-06-25			1
1758	Ashley Garwood	2015-04-18	2015-07-16			3

5 row(s) returned

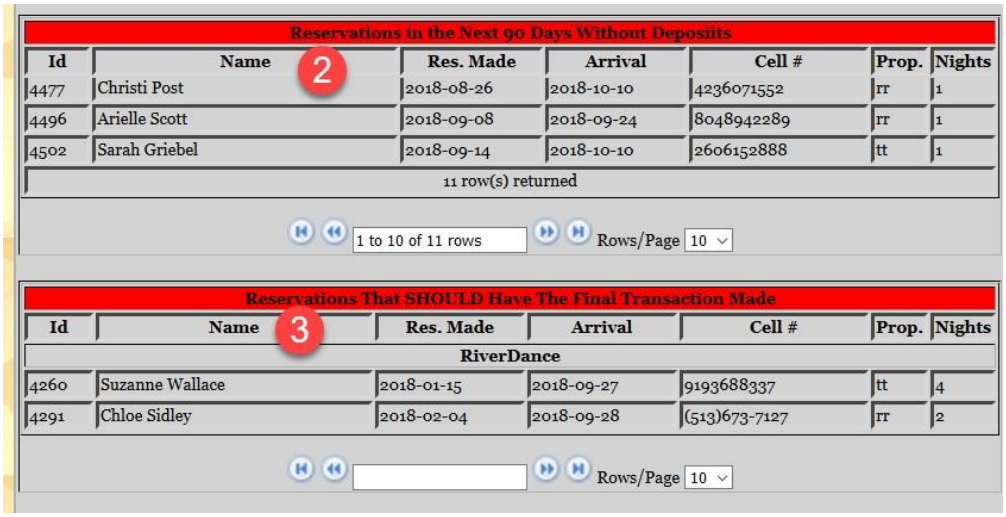
1 to 5 of 5 rows Rows/Page 10

1 New Reservations in the Last Week

Id	Name	Contact	Arrival	Cell #	Prop.	Nights
1745	Craig GarrisonMogren	2015-04-12	2015-06-11		tt	2
1747	Dave Wellendorf	2015-04-13	2015-09-25		tt	3
1748	Marshal Brooks	2015-04-13	2015-04-14		rr	2
1752	Aaron Goretoy	2015-04-14	2015-04-26		tt	2
1755	MariAnne Borchik	2015-04-17	2015-06-03		tt	2
1756	Marina Polkhovskii	2015-04-17	2015-05-04		rr	2
1757	Kelly Clark	2015-04-18	2015-07-31		rr	2

7 row(s) returned

1. Next is a listing of both the "**reservations**" that have come in from initial contacts made in the last week in addition to "**new inquiries**" made in the last week that need to be followed up on. Inquiries are taken out of the "**New**" state when the subscriber has looked at and made a change to the inquiry guest record. MakeRez handles incoming emails from a variety of services than can send inquiries and reservations. Many of the services that can send you reservations simply do not provide a rich enough set of information to actually have MakeRez make the reservation by itself. In those cases, MakeRez considers those to be reservation requests and they will actually be put in the "new inquiries" area. That is the area you will probably be paying the most attention to. To highlight these reservation requests, the name field for those requests will actually have the text "**reservation request**" in it. For any of the inquiries/reservations that MakeRez handles on your behalf, the notes field will contain the entire body of the email message, including the name. As you gather the rest of the information from your guest, you should enter it into MakeRez and when the information is complete, make the reservation.



Reservations in the Next 90 Days Without Deposiits

Id	Name	Res. Made	Arrival	Cell #	Prop.	Nights
4477	Christi Post	2018-08-26	2018-10-10	4236071552	rr	1
4496	Arielle Scott	2018-09-08	2018-09-24	8048942289	rr	1
4502	Sarah Griebel	2018-09-14	2018-10-10	2606152888	tt	1

11 row(s) returned

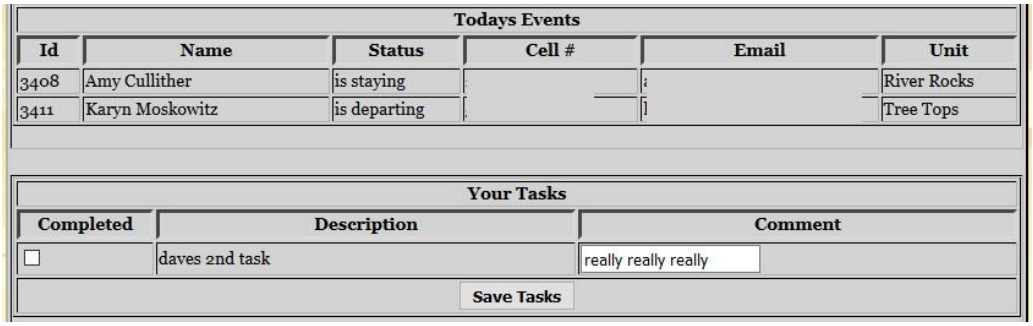
1 to 10 of 11 rows Rows/Page 10

Reservations That SHOULD Have The Final Transaction Made

Id	Name	Res. Made	Arrival	Cell #	Prop.	Nights
RiverDance						
4260	Suzanne Wallace	2018-01-15	2018-09-27	9193688337	tt	4
4291	Chloe Sidley	2018-02-04	2018-09-28	(513)673-7127	rr	2

Rows/Page 10

2. **PREMIUM**. Next you are alerted if there are any reservations coming in the next 90 days that have not at least made a deposit. While you may have gotten reservations from OTA's like the HomeAway family, FlipKey or airbnb this feature is primarily for direct reservations. However it is good practice to put a transaction in for each OTA reservation (perhaps the amount you will receive) so those guests don't appear on here.
3. **PREMIUM**. Another financial alert area are those reservation that should already have there final payment made. One of the items for each property group is how many days before a guests arrival the final payment should be made. If the Paid in Full workflow is not checked and the guests arrival is within the indicated time period, they will appear in this alert.



Todays Events

Id	Name	Status	Cell #	Email	Unit
3408	Amy Cullither	is staying			River Rocks
3411	Karyn Moskowitz	is departing			Tree Tops

Your Tasks

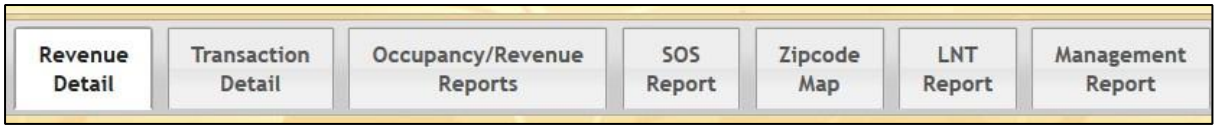
Completed	Description	Comment
☐	daves 2nd task	really really really

Save Tasks

Following the inquiries and reservations are two additional areas. The first is a look at significant events that are happening today such as guests arriving, departing and staying an additional night. You can click on one of those events and be taken to the detailed information for that guest. Also there is an area that contains the tasks that are assigned to the specific person who is logged into MakeRez and within the Dashboard they can add comments to a task and mark a task as complete.

Chapter 7 - The Report Page

The **Report** page contains seven basic types of reports.



The Monthly Revenue Detail Report

Id	Name	State	People	Prop.	Arrival	Nights	Total Rent	Extra	County Tax	State Tax	Cleaning	Total	Paid
1481	tammy smart	SC	2	rr	2015-02-05	1	$115.00	$0.00	$0.00	$9.79	$30.00	$154.79	$154.79
1477	Anita Noel	TN	1	rr	2015-02-06	1	$115.00	$0.00	$0.00	$9.79	$30.00	$154.79	$0.00
1470	Jami Southern	NC	2	rr	2015-02-07	1	$85.00	$0.00	$0.00	$7.76	$30.00	$122.76	$122.76
1485	Trish Perkins	NC	2	tt	2015-02-07	1	$115.00	$0.00	$0.00	$9.79	$30.00	$154.79	$154.79
1420	Anthony DiGiorgio	LA	2	rr	2015-02-11	1	$115.00	$0.00	$0.00	$9.79	$30.00	$154.79	$0.00
1427	Lea Osborne	NC	2	tt	2015-02-13	1	$115.00	$0.00	$0.00	$9.79	$30.00	$154.79	$0.00
1434	Kimberly Grazer	NC	3	rr	2015-02-13	3	$425.01	$0.00	$0.00	$31.39	$40.00	$496.40	$496.39
1445	Lauren Kanner	NC	2	tt	2015-02-14	1	$115.00	$0.00	$0.00	$9.79	$30.00	$154.79	$154.79
1490	rita thomas	TN	2	tt	2015-02-15	1	$115.00	$0.00	$0.00	$9.79	$30.00	$154.79	$154.79
1500	John Gilles	NC	2	tt	2015-02-18	1	$115.00	$0.00	$0.00	$9.79	$30.00	$154.79	$0.00
1439	Susan Walsh	OH	2	tt	2015-02-20	3	$287.49	$0.00	$0.00	$22.11	$40.00	$349.60	$0.00
1484	jennifer ledbetter	TN	2	rr	2015-02-20	2	$230.00	$0.00	$0.00	$18.23	$40.00	$288.23	$115.00
1471	Brenda Therry	TN	2	tt	2015-02-27	2	$230.00	$0.00	$0.00	$18.23	$40.00	$288.23	$115.00
1472	Jessica Chilton	NC	3	rr	2015-02-28	2	$230.00	$0.00	$0.00	$18.23	$40.00	$288.23	$115.00

The Monthly Revenue Detail report rolls up all the bookings you have either for a specific property group or for all your property groups for a particular month. For the purpose of MakeRez, the revenue is realized when the guest leaves, so if a guest starts their stay in April and ends their stay in May, all the revenue would be recognized in May. The combination of the Monthly Revenue Detail report and the guest Transactions Tab on the Guest page does give a fairly good view of your revenue flows and the details of what each guest is spending. In the report above the **Extra** category can represent things like pet fees, services like massages, and a variety of other things.

In the last two columns the T**otal** columns are simply adding up of all the various charge categories listed to the left of it: Total Rent, Extra, County Tax, State Tax and Cleaning. The **Paid** column represents the sum of all the transactions entered for that specific guest. If you are consistently using the transaction system, these two columns should be virtually identical for guests that have already come and gone. If so the color of the Paid column is the standard grey. If the totals don't match and the guest has already left the Paid column will be highlighted in yellow. This should indicate a discrepancy between what should have been the charges and payments that were recorded in the transaction system. If the guest is leaving in the future the two columns typically will not match, but will be highlighted in orange. Although this is normal, these items should be reviewed to make sure all the guest deposits were made and entered into the transaction system properly.

If you want to record more detail on charges for a particular guest you can always put the information into the notes field for the guest or even into the comments field of the transaction. Notes are searchable while transactions are not. Later on, if you can use the Guest Search Tab of the Search page to look for guests say that have a massage noted in the notes field. The Monthly Revenue Details Report also has an "**Export to CSV**" button that copies the contents of its results above to a comma separated file that can be further examined by a spreadsheet like Microsoft Excel.

Disclaimer: In no way do we represent that the revenue and the transaction reports included in **MakeRez** are sufficient to represent a full accounting system to manage that part of your business. They are intended to give a quick overview of interesting information. We strongly recommend that you also implement a full accounting system like QuickBooks.

The Monthly Transaction Detail Report

The primary use of the Monthly Transaction Detail report is to export it with the **Export To CSV** command to a spreadsheet that can be massaged and eventually imported into a accounting program such as quick books. The report is presented for a specific month. All guests that leave during that month (when the revenue is recognized) will be included in the report. The system will add transactions to guest accounts during nightly maintenance. For all but the last day of their stay, the appropriate rate for that day will be taken out of the booking table and a new transaction for that night's rent will be created for it. On the last day, in addition to the nightly rent transaction, transactions for cleaning, taxes and extra charges will be added in.

When a payment from the guest is received, it should be manually entered into the transaction system by bringing up the Transaction Tab on the guest page. By the time the guest leaves, and the last payment is entered, all the transactions should sum to zero indicating complete payment has been made for their stay. Following is an example of the Monthly Transaction Detail report. When the booking is done online through the property website, If you are taking deposits using the MakeRez connection to authorize.net, that initial transaction will also be put into the transaction as part of the reservation process.

Guest Id	Tran Id	Tran Type	Date	Amounts	Comments
1420	87	Rent	2015-02-11	115.00	nightly rent
1420	88	Clean	2015-02-11	30.00	cleaning
1420	89	Tax	2015-02-12	9.79	taxes
1427	93	Rent	2015-02-13	115.00	nightly rent
1427	110	Clean	2015-02-13	30.00	cleaning
1427	111	Tax	2015-02-13	9.79	taxes
1434	92	Rent	2015-02-13	170.00	nightly rent
1434	112	Rent	2015-02-14	170.00	nightly rent
1434	116	Rent	2015-02-15	85.00	nightly rent
1434	117	Clean	2015-02-15	40.00	cleaning

Transactions are first grouped in ascending order by the guest id, and within the transactions for a particular guest, they are ordered by date.

The 12 Month Occupancy Summary Report

Two of the most important operational reports about your properties to look at are the Occupancy percentages for the various property groups you have under management, in addition to the Revenues that are being generated. The revenue and occupancy that represent historical information should very closely approximate your actual numbers if you have been keeping all the monetary information correct in MakeRez. Future revenue/occupancy simply reflect what you have already booked and will change on a continuing basis as more reservations are added. However, future numbers can still be useful to see how far you have to go to hit your goals. If there looks like a potential shortfall, they might indicate the need for a special marketing program to fill the gap.

You may temporarily need to block a unit off the calendar due to maintenance (painting, renovation) or you are closing in inn to take a vacation. The best way to accomplish this is to make a booking for it using your contact info, a zero rate and zero zip code. Then during the blocked out period the unit will add into part of the monthly revenue reports and will not be part of the zip code map display. In addition to the "**Monthly Occupancy Report**" there is also a "**YTOD Monthly Occupancy Report**". For example, that allows you to

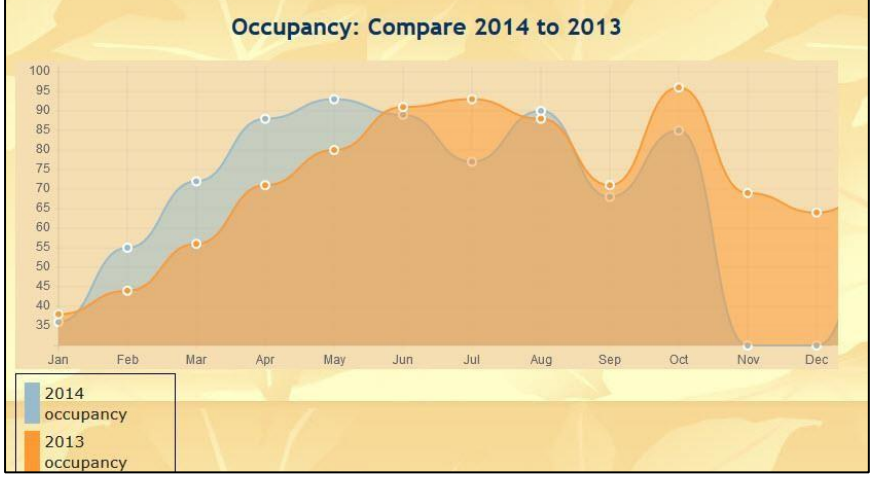
more directly compare your trends in occupancy between 2015 and 2014 by cutting off reservations that came in after the current day and month of each year.

Both reports also have an "**Export to CSV**" button that copies the contents of its results above to a comma separated file that can be further examined by a spreadsheet like Microsoft Excel.

Occupancy Report

2014	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
RiverDance	36 %	55 %	72 %	88 %	93 %	89 %	77 %	90 %	68 %	85 %	30 %	8 %	65 %
tt	35 %	39 %	67 %	86 %	93 %	96 %	64 %	93 %	76 %	80 %	20 %	0 %	62 %
rr	38 %	71 %	77 %	90 %	93 %	83 %	90 %	87 %	60 %	90 %	40 %	16 %	69 %

2013	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
RiverDance	38 %	44 %	56 %	71 %	80 %	91 %	93 %	88 %	71 %	96 %	69 %	64 %	71 %
tt	16 %	46 %	48 %	60 %	74 %	86 %	90 %	93 %	56 %	96 %	66 %	54 %	65 %
rr	61 %	42 %	64 %	83 %	87 %	96 %	96 %	83 %	86 %	96 %	73 %	74 %	78 %



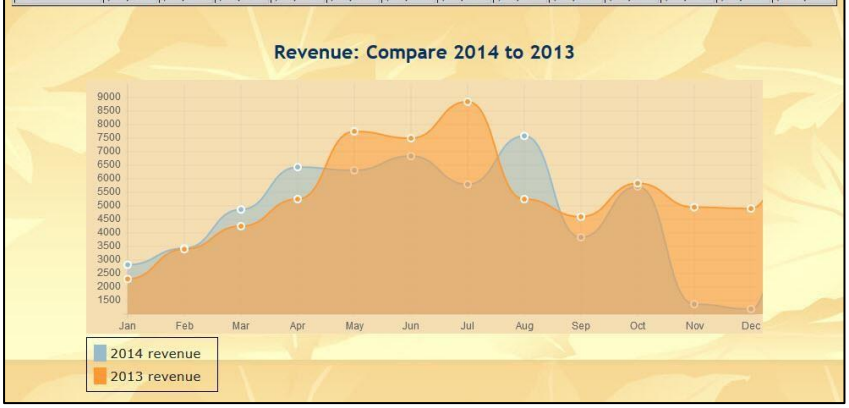
There are actually three types of revenue report. The first, pictured below reflects the revenue you have earned that results from folks staying at your property during the month. For simplicity, all the revenue for a single stay is realized on the day of departure. So if a stay "spans" over a month boundary, that revenue is credited to the month the departure for the stay happens. We call this "**Earned Revenue**".

Both the Revenue Summary Report and the Occupancy Summary Report above is for the RiverDance. There are two units (River Rocks, rr and Tree Tops, tt). The revenue and occupancy numbers for the units are "rolled up" for RiverDance itself and then the yearly numbers are summarized at the end of the table.

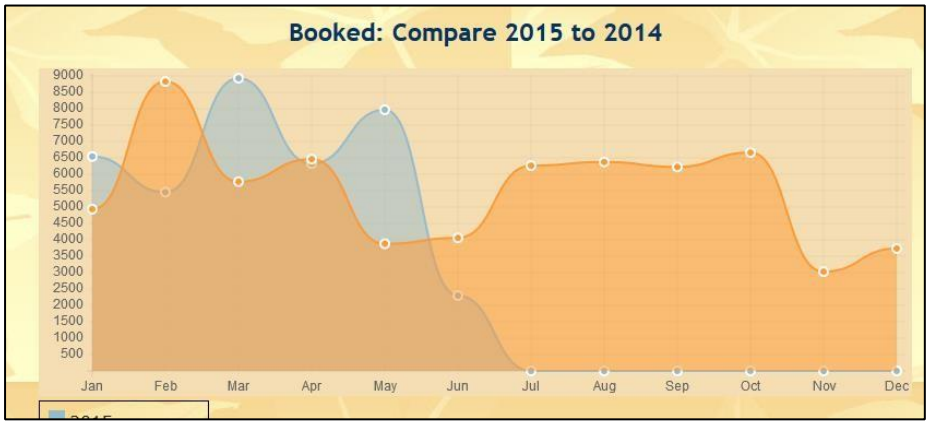
The 12 Month Earned Revenue Summary Report

2014	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
RiverDance	$ 2,825	$ 3,435	$ 4,866	$ 6,433	$ 6,315	$ 6,840	$ 5,795	$ 7,585	$ 3,840	$ 5,715	$ 1,370	$ 1,190	$ 56,209
tt	$ 1,100	$ 1,270	$ 2,390	$ 3,233	$ 3,180	$ 3,595	$ 2,415	$ 4,405	$ 2,000	$ 2,745	$ 625	$ 0	$ 26,958
rr	$ 1,725	$ 2,165	$ 2,476	$ 3,200	$ 3,135	$ 3,245	$ 3,380	$ 3,180	$ 1,840	$ 2,970	$ 745	$ 1,190	$ 29,251

2013	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
RiverDance	$ 2,300	$ 3,400	$ 4,250	$ 5,250	$ 7,750	$ 7,500	$ 8,850	$ 5,250	$ 4,600	$ 5,835	$ 4,950	$ 4,903	$ 64,838
tt	$ 400	$ 1,800	$ 1,800	$ 2,500	$ 3,500	$ 3,800	$ 4,650	$ 2,800	$ 2,100	$ 2,835	$ 2,600	$ 2,293	$ 31,078
rr	$ 1,900	$ 1,600	$ 2,450	$ 2,750	$ 4,250	$ 3,700	$ 4,200	$ 2,450	$ 2,500	$ 3,000	$ 2,350	$ 2,610	$ 33,760

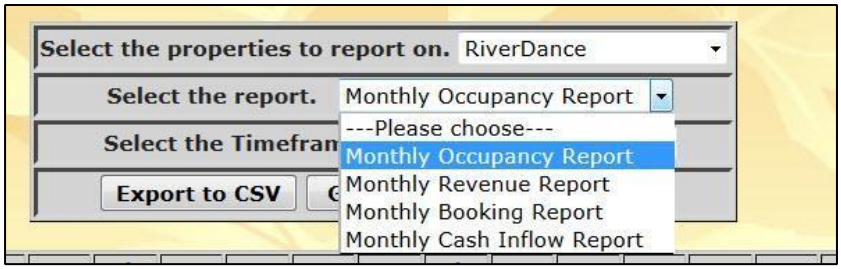


There are two other revenue reports that MakeRez can provide. The first is a "**Booked Revenue Summary**" and it reflects a month by month picture of the revenue your property will generate in the future by the bookings you make during the month. As you can see in the image above, for RiverDance the **Earned Revenue** is typically low during the first few months of the year. It's the winter season in the mountains and we aren't close to any ski resorts. However, the "Booked Revenue" is actually much stronger indicating while not as many people are staying in the winter months, once the holidays pass, they again start booking future stays. So are the winter months a good time to advertise? We might be tempted to hold back based on earnings, but the answer is yes because that's when we can effect a significant number of guests who are looking to book a future stay.

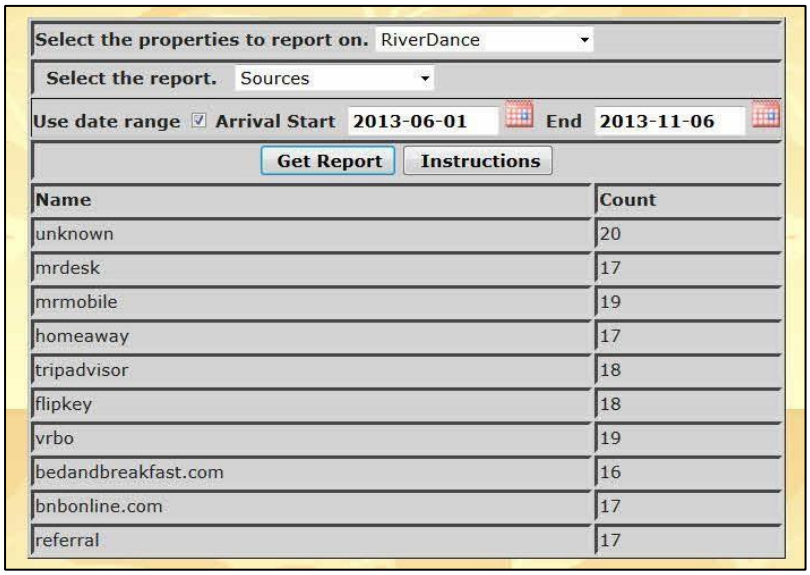


The last type of revenue report is a "**Cash Inflow**" report that details what monies should actually be coming into your bank account during the month. This consists of two different streams of cash. The first is the deposits you take for bookings that are made during the month. Added to that would be the final payments made by guests who are arriving at your property during the month.

All four reports can be selected on the **Occupancy/Revenue Report Control**. Each of the four reports can be exported into its own spreadsheet by using the "**Export to CSV**" button.



The SOS Report



Name	Count
unknown	20
mrdesk	17
mrmobile	19
homeaway	17
tripadvisor	18
flipkey	18
vrbo	19
bedandbreakfast.com	16
bnbonline.com	17
referral	17

SOS Reports that focus on your lead sources (S), the occasions that your customers come to celebrate (O) and what specials (S), if any, they are taking advantage of. **Sources** allow you to understand how productive particular marketing initiatives are in the most important way. It doesn't report on impressions, or click throughs to your website, but on how many folks coming from that source actually booked. As such is should be an important part of your discussion with guests, just where they initially heard about you and you may need to tactfully lead them past the generic answer of "on the internet". Putting some time in gathering information about Sources from your guests can really be important in assessing where to allocate your future marketing resources.

The two sources **mrdesk** and **mrmobile** refer to clients using the **MakeRez** booking engine, either the desktop or mobile version. That information will help you understand, along with things like Google Analytics, the balance between desktop bookings and bookings coming from a mobile device. There are mobile advertising services out there that could help you target mobile devices with ads pushed to folks that subscribe to various sports or news feeds. So the desktop/mobile breakdown could help you decide if one of those services might be an option.

Having either a separate mobile website, like we do at RiverDance, or a responsive website to service the gamut of devices your customers use, is become increasing critical to attracting customers to your property. More and more people are researching travel options using mobile devices and may indeed simply drop your property from consideration if your website is difficult to use on their phones. In addition, Google is starting to use whether or not a site is "mobile friendly" as part of its ranking criteria. So if you want to be on the first page of the Google results having a "mobile friendly" website is increasingly important.

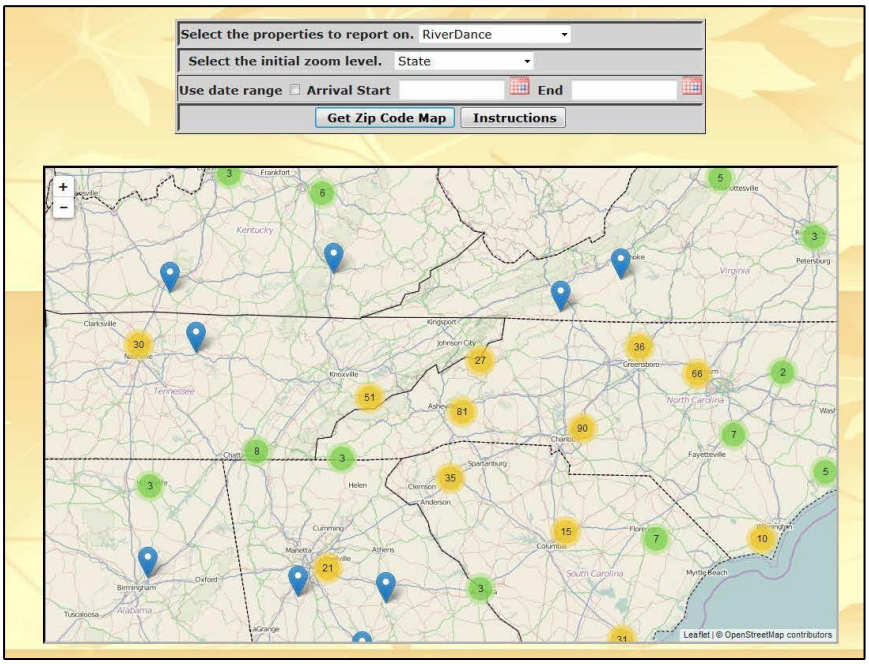
The **Occasions** report looks almost identical to the one above. Occasions are things like weddings, anniversary, family vacations, meetings, ... that guests associate with their visit to you. Suppose you started to feature trout fishing or zip lining in your marketing efforts or to create a special for all those honeymoon couples that are finding

you. Occasions could help you look before that focus and after to see the potential impact that effort had in generating incremental bookings

Finally the **Specials** report also looks very similar to Sources and Occasions. Here you can track specific special offers (like a mid winter mid week special or a package you might offer that includes a massage and facial). The whole idea is to be able to see the impact of a particular special by seeing how many guests took advantage of it.

Reservations that reflect service outages (units being painted, …) will not be included in SOS reports. See the tip on Service Outages in Chapter 5 about the Calendar page.

Zip Code Map Report



The Zipcode Report provides a geographic overview of where your guests are coming from along with the ability to drill down for more detail. You can filter the inquiries/guests based on the property group or look at all the property groups you manage. In addition you can limit the inquiries/guests that are put on the map by checking the "**Use date range**" box and then entering in the initial and final arrival dates you would like to consider.

For the example map above there would be over 900 groups plotted on the map. Far too many to really understand well. So the map takes advantage of a "clustering" technology where groups that are in a close geographic proximity are plotted together with a group cluster icon. The circular icons on the map above show the clusters with the number of groups in the cluster. In our example map 81 guest groups have come from the Asheville NC area and appear in the Asheville cluster, while 90 groups have come from the Charlotte NC area and appear in its cluster. By using the zoom commands (the + and - symbols) on the upper left of the map, you can adjust the map by zooming either in or out. You can also hover over the map and by clicking and holding the left mouse button you can drag the map to display other areas of it. If you would like to focus and zoom into one of the cluster areas, simply click on it. Finally, if you hover over one of the blue individual icons it will display the zip code associated with it which can help you search for the guest that is tied to that icon.

One of the central elements needed to create the map is a table that is kept in the database that associates with every US zip code, the latitude and longitude of the "center" of the zip code. The actual guests and inquiries that we plot on the map are a small "randomization" of those center points. So when the map zooms in to greater and greater detail the mapped guests do not directly fall on top of one another, but have some

visual separations. **At this time MakeRez makes no attempt to precisely locate guest at their address in the zip code map. We simply plot them at a random location in the zip code.**

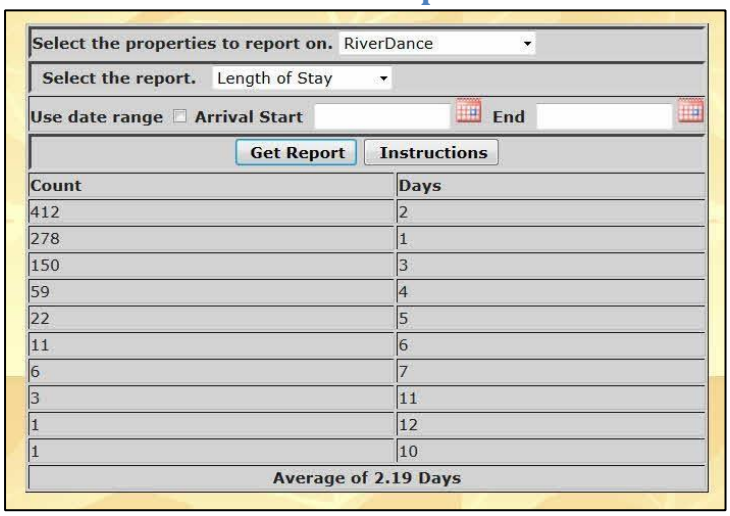
As you zoom the map in for greater detail the clusters start resolve themselves into individual pin icons (the blue icon with the white circular dot in it) that represents just a single guest or inquiry. That's a lot of background information, but the real question is how can I use this in my marketing? First, by understanding how large the concentrations of guests are from various regions you could decide it might be valuable to do some region specific marketing. That could be because you see you'r getting quite a lot of folks coming from Charlotte so you think you could drive even more traffic from that area by doing some local advertising.

Or you my look at it from another perspective and see that you have roughly the same number of visitors from the Charleston SC area compared to the Greenville/Spartenburg area. But the Greenville/Spartenburg metropolitan area is 50% larger than the Charleston metropolitan area. For our property, RiverDance, located near Hot Springs NC, Charleston is 4 1/2 hours away while Greenville is only 2 hours away. Both the distance and the population size suggest there should be significantly more business coming our way from Greenville than from Charleston so perhaps some local marketing efforts in the Greenville area may be in order.

Now if you ran a marketing campaign based on the observations above, how could you assess its effectiveness? By going back to the zip code map you could plot the six months of data before the campaign and compare it to the six months of data after the campaign. If the marketing campaign gained some traction we would expect to see the ratio of guests coming from the Greenville area versus the Charleston area to increase.

Reservations that reflect service outages will not be included in Zip Code Map reports since the zip code used in those reservations is 000000 and is not a real zip code. See the tip on Service Outages in Chapter 5 about the Calendar page.

The LNT Report


Select the properties to report on. RiverDance

Select the report. Length of Stay

Use date range Arrival Start End

Get Report Instructions

Count	Days
412	2
278	1
150	3
59	4
22	5
11	6
6	7
3	11
1	12
1	10

Average of 2.19 Days

LNT Reports give you the ability to view over a specific timeframe of how long (**L**) your guests are staying, what the number (**N**) of people are in each party and what are the top (**T**) states that guests are coming from.

The length of stay report illustrated above gives you a profile over a given period of time of how many guests are staying for how many days. If your goal is to help bump occupancy up by reaching out to family groups that will be staying a longer period of time, this report can assist you in understanding what progress you are making. Leaving the date range blank uses all the guest data you have in the database.

The number of people report details how many guest groups had 1, 2, 3 or more members. Keeping track of these guest statistics helps us to better understand our revenue flow and whether we need to expand our family and business group marketing efforts.

Finally the Top States give a quick numerical overview of where the guests are coming from. If we want a more detailed view we will go to the Zip Code Report.

Reservations that reflect service outages will not be included in LNT reports. See the tip on Service Outages in Chapter 5 about the Calendar page.

The Property Management Report

Property Management Statement

Select the properties to report on. RiverDance

Instructions | Print Report | Get Report

Report Start 2015-04-01 End 2015-04-30

PROPERTY MANAGEMENT STATEMENT
(Retain for Income Tax Purposes)

Apr 1, 2015 to Apr 30, 2015

To:
RiverDance
Dave and Callie
179 Deer Leap
Marshall, NC 28753

From:
Callie Wellendorf
179 Deer Leap
Marshall ,NC 28753

Your monthly report of income and expenses is submitted as follows: (expense vouchers attached)

Property Address 163 High Mtn Road	Rent Collected	Paying Rent		Fee	Expenses and Other Disbursements	
		From	To		Paid to/or For	Amount
Susan Goenke $0.00	$510.00:$40.00	4/16/15	4/19/15	$102.00	Gentry HW	$100.00
Susan Goenke $0.00	$510.00:$40.00	4/16/15	4/19/15	$102.00	Lowes	$125.00
Margo Hasselman $0.00	$800.00:$40.00	4/1/15	4/6/15	$160.00	Walmart	$100.00
Carl Sams $0.00	$170.00:$30.00	4/24/15	4/25/15	$34.00	Gentry HW	$100.00
Elizabeth Meijer $0.00	$230.00:$40.00	4/10/15	4/12/15	$46.00		
Allison Heller $0.00	$575.00:$40.00	4/3/15	4/8/15	$115.00		
Haley Kachmarik $0.00	$345.00:$40.00	4/10/15	4/13/15	$69.00		
Greg Bullock $0.00	$230.00:$40.00	4/6/15	4/8/15	$46.00		
Amy DeVoogd $0.00	$345.00:$40.00	4/30/15	5/3/15	$69.00		
Jack and Jess Adams $0.00	$345.00:$40.00	4/19/15	4/22/15	$69.00		
jorge jelicic $0.00	$230.00:$40.00	4/30/15	5/2/15	$46.00		
Joel Farren $0.00	$115.00:$30.00	4/24/15	4/25/15	$23.00		
Emilee Hendrix $0.00	$345.00:$40.00	4/9/15	4/12/15	$69.00		
Callie Wellendorf $0.00	$0.00:$0.00	4/8/15	4/10/15	$0.00		
Greg conradi $0.00	$345.00:$40.00	4/27/15	4/30/15	$69.00		
Greg conradi $0.00	$58.00:$20.00	4/30/15	5/1/15	$11.60		
Jennifer Glenn $0.00	$115.00:$30.00	4/25/15	4/26/15	$23.00		
Vadim Mirkin $0.00	$115.00:$30.00	4/26/15	4/27/15	$23.00		
Jorge Eleta $0.00	$170.00:$30.00	4/25/15	4/26/15	$34.00		
Marshal Brooks $0.00	$230.00:$40.00	4/14/15	4/16/15	$46.00		
Aaron Goretoy $0.00	$230.00:$40.00	4/26/15	4/28/15	$46.00		
Robert Skeirik $0.00	$115.00:$30.00	4/21/15	4/22/15	$23.00		
Carol Farroch $0.00	$115.00:$30.00	4/23/15	4/24/15	$23.00		

Total Rent Collected $7033.00

Total Paid Out $425.00
Management Fee $1248.60
CC Fees $0.00
Check Enclosed $5359.40

The Property Management Statement provides the basic revenue and expense data to provide your clients that documentation needed to meet your reporting responsibility to them provides the financial end of managing their properties.

The report is modeled after a North Carolina Realtors report and operates in the following fashion. In your normal operation of MakeRez you provide guest information that details the revenue side of the equation. This consists of how much rent is collected, what the credit card processing fees are, what the cleaning fees are, what your management commission is,…

You also collect information from the expense side of the equation when folks perform services (like housekeeping, maintenance, landscaping,…) in addition to the need to purchase products for cleaning, guest use,…

While all this information is scattered in the various tables MakeRez uses to store its data, the Property Management Statement report brings it all together in one easy to understand fashion.

To create the report, simply use the property selection box to indicate which property you would like to focus on. Next use the Report start and end date selectors to focus on the date range you would like to report to be for. Then you can click on the "**Get Report**" button to ask MakeRez to go out and collect the relevant data and to display the

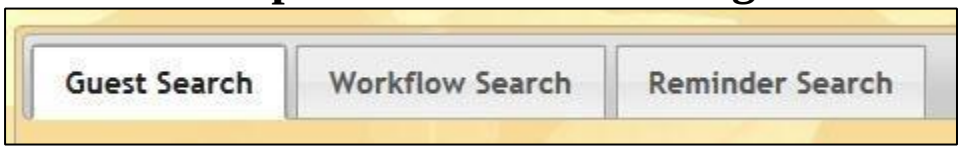
report. That will produce a report like the one above with revenues on one side and expenses on the other and with summary information at the bottom.

After the report is generated you can use the "**Print Report**" button to ask your browser to print the report. The browser will reformat the report so it will fit on one or multiple 8 ½ x 11 page(s) and allow you to select which printer you would like to have it printed on.

One extra feature you might want to consider is installing a "pdf printer" like doPdf, http://www.dopdf.com. This is a free tool that allows you print to a pdf file rather than a physical printer. That pdf file version of the Property Management Statement will allow you to print directly to a pdf file which can be saved to a folder on your computer and attached to an email to your client. Within Windows 10 there is a Microsoft Print to PDF printer already installed that can be used for this.

Note: Just like the other revenue reports that MakeRez creates, a guests revenue is realized during the month they depart. So if a guest arrives on Jan 30, stays for 3 days and leaves of Feb 2, their revenue is realized in February.

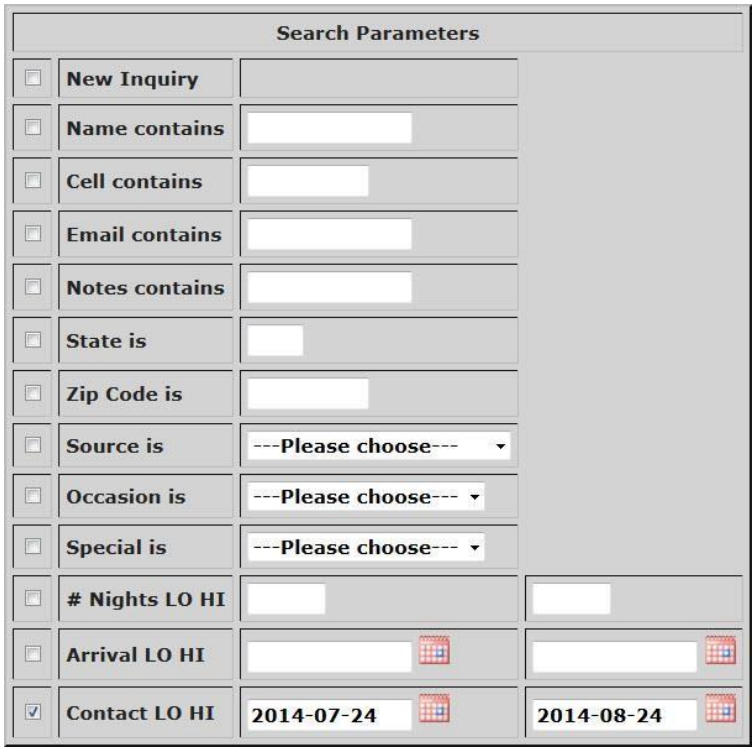
Chapter 8 - The Search Page



The search page contains three basic types of searches.

The first is the **Guest Search Tab** which allows searching through demographic data like state, cell phone #, .. that was entered for a inquiry/guest. The Instructions button on the Guest Search Tab provides more information on this. Be sure to specify which property group you are interested in searching for. If this is not set the report will be for all property groups.

Guest Search Tab



Understanding your guests and being able to categorize them in a variety ways can help you be more productive. The **Guest Search Tab** allows you to search for guests that meet a variety of demographic criteria that has already been entered into your database. For example you may remember a guest that is coming in the near future lives in Charleston SC and they wanted you to set up a massage for them. But you need to call them to discuss the details. You can use the **Guest Search Tab** to restrict your search to a specific range of contact dates and also ask that their cell phone number in the database contain the 843 area code used in Charleston.

When the Search page starts up, it immediately displays the **Guest Search Tab** and searches for guests that have made contact with you in the last month. It's a good place to start to understand your inquiries and reservations.

Another example is suppose you as a standard keep in the notes field information about guests stay, such that they went zip lining. Now you've just heard that the huge expansion the local zip lining course is doing is now open. You'd like to send an email to them to entice them to come back and try out the new zips. So you setup a guest search that looks for the word zip in the notes field for folks that have contacted you in the last two years. Another way to do this is to include Zip Lining as one of the occasions that you track.

The **Guest Search Tab** offers a variety of ways to focus on just the guests you are interested in. By selecting the checkboxes associated with each filter you can narrow the set of guests that are displayed. Selecting multiple checkboxes implies all checked conditions must be met for a guest to be displayed. The following filters are supported. If the checkbox for a filter is not checked, then that filter is not used.

- **Name Contains:** Name fragment if the checkbox is checked.
- **Cell Contains:** Name fragment if the checkbox is checked.
- **Email Contains:** Email fragment if the checkbox is checked.
- **Notes Contains:** Notes fragment if the checkbox is checked..
- **State Is:** Two letter state code if checkbox is checked..
- **Pets Y/N:** Y or N if the checkbox is checked if the checkbox is checked..
- **Source is:** Selected value if the checkbox is checked..
- **Occasion is:** Selected value if the checkbox is checked..
- **Special is:** Selected value if the checkbox is checked..
- **# Nights Lo Hi:** Guests whose length of stay that si within the given range of nights if the checkbox is checked.
- **Arrival Lo Hi** Range of dates during which the guest is arriving if the checkbox is checked.
- **Contact Date Range:** Range of dates that the initial contact was made if the checkbox is checked..

Guest Search Example

In this example we are looking for guests that came to us through **tripadvisor** and whose cell phone number contains 843.

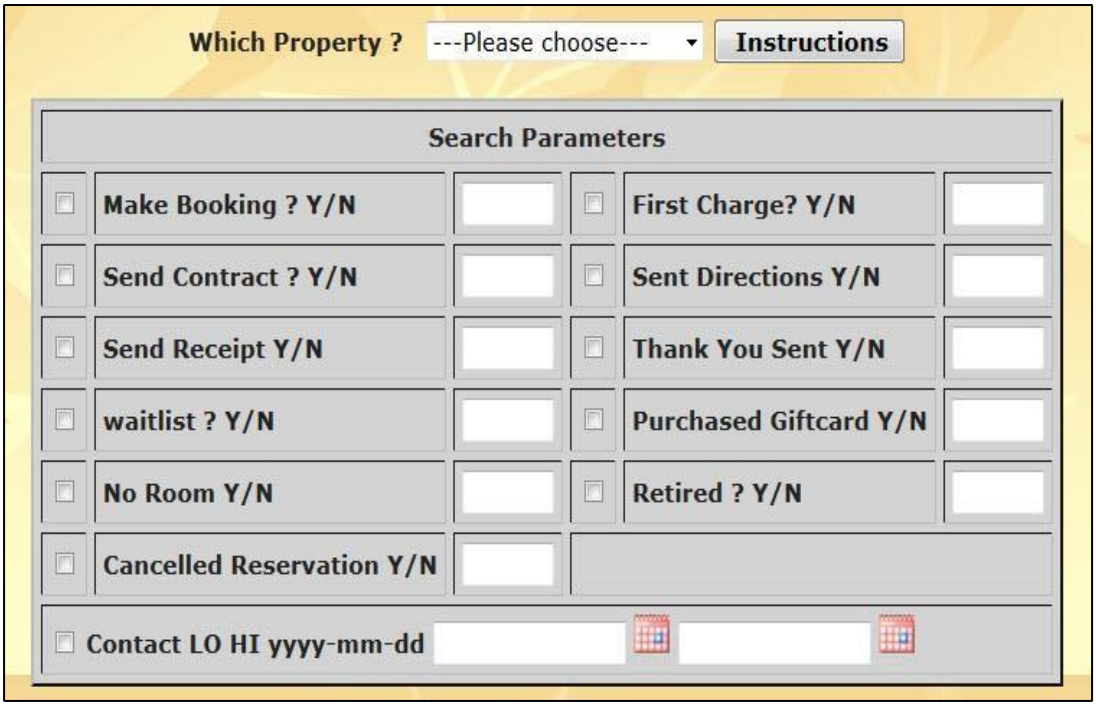
Typical Search Results

Id	Name	Arrival	State	Cell #	Email	Adults	Kids	Pets	Prop.	Contact Date	Nights
950	Sarah Strike	2013-12-28	TN	324 657-1234	dwell@rr.com	4	0	N	tt	2014-03-03	4
951	Peter Sawrij	2014-09-21	AL	324 657-1234	dwell@rr.com	2	0	N	rr	2014-03-03	6
952	William McDowell	2013-11-18	VA	324 657-1234	dwell@rr.com	2	0	N	rr	2014-03-03	2
953	Cathy Graham	2013-11-21	NC	324 657-1234	dwell@rr.com	2	0	N	tt	2014-03-03	1
4 row(s) returned											

When the guest search is actually done, the above type of display is created. You can click on each row in the table and bring up the entire guest record for that guest on the Guest page. There is also an "Export to CSV" button that copies the contents of the search results above to a comma separated file that can be further examined by a spreadsheet like Microsoft Excel or used in your marketing campaigns.

The second type of search is the ability to look for guests based on which workflow actions have been taken for a particular inquiry/guest. So you could look for guests that are on your wait list or perhaps that you have sold gift cards to. The Instructions button Workflow Search Tab provides more information on this.

Workflow Search Tab



Workflows are a way of communicating with your guests and understanding where they are in the process of coming to your property. If can often be used to look at the guest information for folks who match a specific set of workflow filters. For example you may want to periodically look at what guests have booked, but have not yet been sent a contract. Or perhaps what guests might be on your wait list when you get a cancellation and need to fill that unit. Also you might want to get a list of folks who have cancelled. They might be good ones to make a special offer to and entice them to come at another time. The Workflow Search Tab offers a variety of ways to focus on just the guests you are interested in. By selecting the checkboxes associated with

each filter you can narrow the set of guests that are displayed. Selecting multiple checkboxes implies all the checked conditions must be met for a guest to be displayed. The following filters are supported:

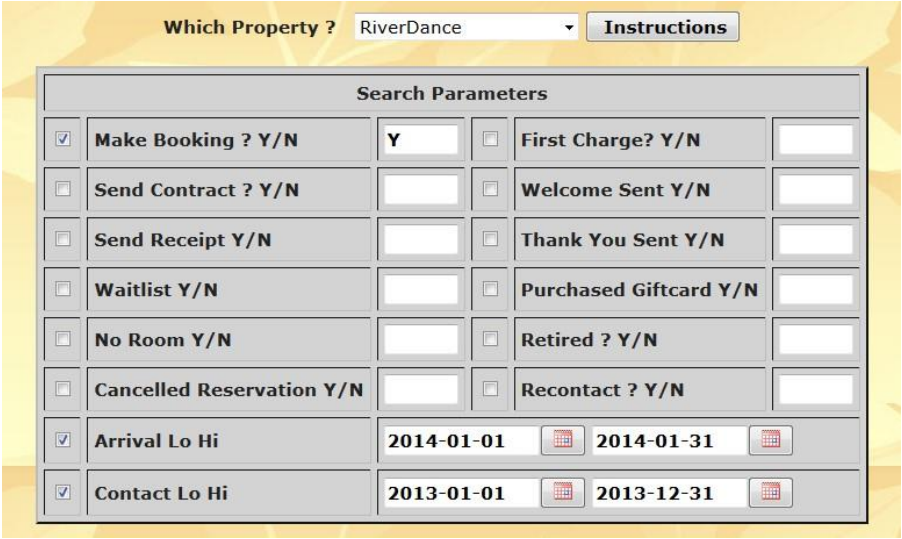
- **Which Property:** Indicates which **property group** the reminder is for.

- **Make Booking:** Y or N if the checkbox is checked. No effect if not checked.
- **Send Contract:** Y or N if the checkbox is checked. No effect if not checked.
- **First Charge:** Y or N if the checkbox is checked. No effect if not checked.
- **Welcome:** Y = email sent, n = not sent, if the checkbox is checked. No effect if not checked.
- **Thank You:** Y = email sent, n = not sent, if the checkbox is checked. No effect if not checked.
- **Purchased Gift Card:** Y or N if the checkbox is checked. No effect if not checked.
- **Send Receipt:** Y = email sent, n = not sent, if the checkbox is checked. No effect if not checked.
- **Wait List:** On wait list?, Y or N if the checkbox is checked. No effect if not checked.
- **No Room:** Unable to help guest due to lack of space ?, Y or N if the checkbox is checked. No effect if not checked.
- **Cancelled:** Did the guest cancel their stay?, Y or N if the checkbox is checked. No effect if not checked.
- **Retired:** Was the lead retired due to lack of response ?, Y or N if the checkbox is checked. No effect if not checked.
- **Contact Date Range:** Range of dates that the initial contact was made.

Exploring Your Data

It's getting toward the end of December 2014 and we take a quick look at the January 2015 calendar in MakeRez. It shows that we currently have a 28% projected occupancy rate based on current bookings. Seems low, is there a problem? First we use MakeRez to look at calendar for January of 2014 and see its actual occupancy rate was 39 %. We still have a little over a month to go before the end of January 2015 so we know we will pick up some additional bookings. But is it reasonable to believe we will match the 39 % occupancy number we hit last year? Let's see how the data in MakeRez can help us better understand that question.

MakeRez keeps two dates in each guest record for a guest who has booked, the date the initial inquiry was made and the arrival date. So we want to know how many nights were booked in January 2014 by guests who actually did the booking (made the initial contact) before the end of December in 2013. That's the situation we are in at the end of December 2014 looking at occupancy numbers for January of 2015. As it turns out the **Workflow Tab** on the **Search Page** can help answer our questions. Here is the form you would fill out to ask MakeRez that question.



Now that isn't exactly the question we wanted to ask since it reports only on guests whose arrival date was in January 2014. And it uses the contact date as a proxy for the booking date. There is a possibility a guest arrived in December 2013 and staying through into January 2014 and also a possibility that a guest arrived at the end of January 2014 and stayed into February. But the question is close enough to the one we wanted to ask, that the information should be relevant. And as it turns out, for guests that booked for January 2014 before the end of December 2013, we had almost an identical projected occupancy rate to what we are currently seeing for January 2015. So we seem to be on par with being close to matching our numbers from last year.

But is often the case, asking one question can lead to another. In general how far ahead of their arrival do people book? To answer this question we need the search capabilities of MakeRez in addition to some basic spreadsheet operations in Excel. First we gather the data by filling out the following workflow search form.

That shows us information for the guests that contacted us in 2013 that have also booked. As it turns out that was close to 300 groups of guests. The **Export to CSV** button can be used to copy all that data to an Excel spreadsheet that looks like this.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Id	Name	Arrival	State	Cell #	Email	Adults	Kids	Booked	Prop.	Contact Date	Nights
2	614	John D	1/5/2013	SC	828-60	r2dust	2	0	Y	rr	1/3/2013	1
3	615	Lisa Br	1/5/2013	NC	828-77	lisalab	2	0	Y	tt	1/3/2013	1
4	617	Andre	1/12/2013	TN	423-64	Andre	2	0	Y	tt	1/6/2013	1
5	618	Arash	1/13/2013	NC	704-95	omran	2	0	Y	rr	1/8/2013	2
6	619	Julian	1/15/2013	TN	615~80	jsandb	2	0	Y	rr	1/9/2013	2
7	620	Zane A	1/17/2013	NC	828-48	zanepa	2	0	Y	rr	1/8/2013	1
8	626	Alison	2/1/2013	GA	404-92	waterc	2	0	Y	rr	1/16/2013	2
9	627	Chase	2/2/2013	TN	402-31	ckstayl	2	0	Y	tt	1/26/2013	1

This information contains both the contact date and the arrival date for each guest. With the magic of Excel all we have to do is to define a new column titled **Time Lag** and subtract the contact date from the arrival date. That gives us, for each guest, the time lag between making the first contact and the date of their arrival. Next Excel's sort function can produce something like the following with the time lags listed from low to high.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	**Id**	**Name**	**Arrival**	**State**	**Cell #**	**Email**	**Adults**	**Kids**	**Booked**	**Prop.**	**Contact Date**	**Nights**	**Time Lag**
2	657	Darrell	3/26/2013	TN	847-80	mr.lou	2	0	Y	tt	3/26/2013	1	0
3	790	Arielle	6/1/2013	NC	804-89	weller	2	0	Y	tt	6/1/2013	1	0
4	801	Jeff Cc	6/10/2013	TN	615-30	otani4	2	0	Y	rr	6/10/2013	1	0
5	806	Jeffrey	6/16/2013	VA	276-69	vanho	2	0	Y	rr	6/16/2013	1	0
6	882	Nancy	9/6/2013	NC	(336) 2	nancy	2	0	Y	tt	9/6/2013	1	0
7	905	Charle	9/18/2013	NC	919-67	chmill	2	0	Y	tt	9/18/2013	2	0
8	912	callie	9/23/2013	NC	847-80	weller	2	1	Y	tt	9/23/2013	2	0
9	952	Williar	11/18/2013	VA	757 32	bllmcc	2	0	Y	rr	11/18/2013	2	0
10	680	Cory C	4/29/2013	TN	865-21	netsur	2	0	Y	rr	4/28/2013	1	1
11	805	callie	6/15/2013	NC	847-80	weller	2	0	Y	rr	6/14/2013	1	1

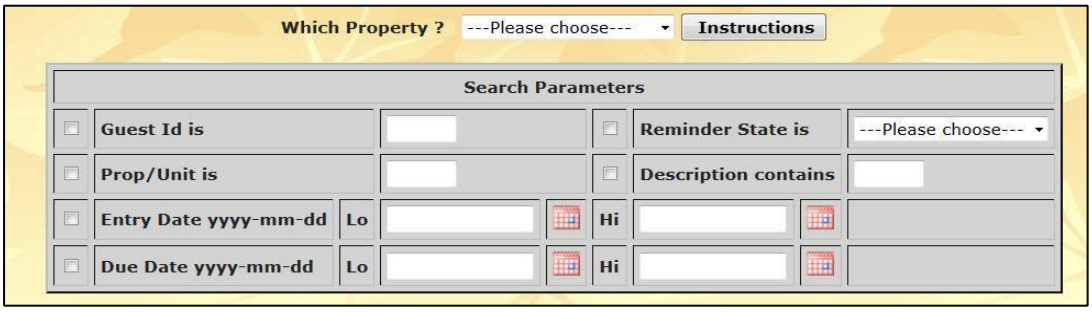
Since there were close to 300 guests in our list we go to row 31 to find out the 10 % of the guests arrived within 3 days of their booking. If we go to row 61 we find out that 20 % of the guests arrived within 9 days of their booking. In fact we can come up with the following information.

P	Q
% of Bookings	**Time Lag**
10	3
20	9
30	18
40	27
50	40
60	56
70	76
80	97
90	138
100	410

We can take it one step further and actually use the spreadsheet data to check what percentage of guests booked in the same month that they arrived, and that actually turned out to be 24 % for the year. If we got that number of additional reservations, we would end up booking 23 nights during January 2015 versus the 24 we booked last year. So if we want to exceed last year's January numbers we might want to run a winter special, which indeed we did. And at the end of the day we actually had a higher occupancy rate in January 2015 (53%) than we did in January 2014 (38%).

The last search is to focus on the Reminder system that **MakeRez** has. You could look for Reminders that were due to be completed in the next week, which is what the Dashboard page reports on.

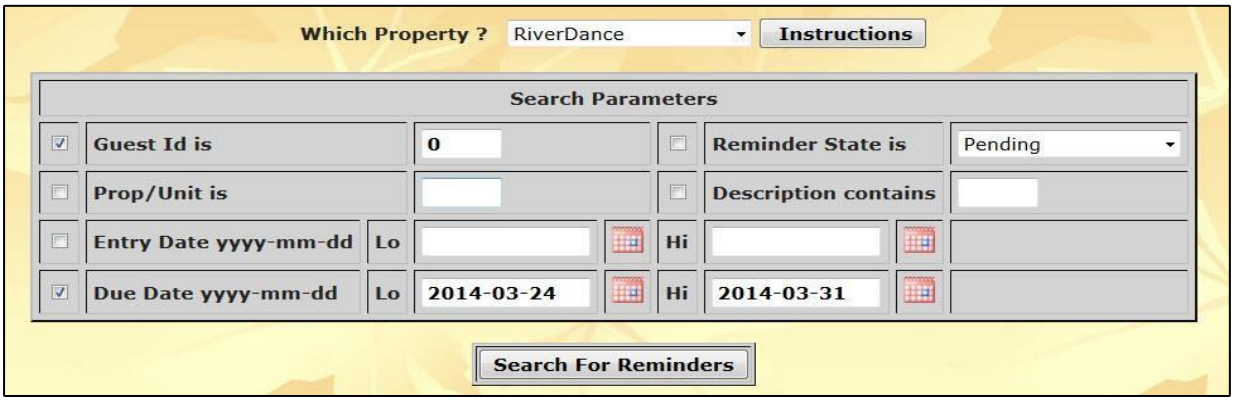
Reminder Search Tab



Reminders are more useful when are found easily. If you know that a reminder is for a specific guest id, you can bring up the **Reminder Tab** on the Guest page. But reminders may not be associated with a guest; they may simply be a reminder for you to do something like place an ad by a certain date or to schedule the cleaning of your properties windows. So the Reminder Search Tab that is part of the Search page will help you look at the whole range of Reminders. It offers a variety of ways to focus on just the Reminders you are interested in. By selecting the checkboxes associated with each filter you can narrow the set of Reminders that are displayed. Selecting multiple checkboxes implies all checked conditions must be met for a Reminder to be displayed. The following filters are supported:

- **Which Property:** Indicates which property group the reminder is for.
- **Guest Id:** Indicates what guest id the reminder is for. If guest id = 0, the reminder is for the property group itself.
- **Reminder State**: Pending, Completed or All.
- **Entry Date:** Date the reminder was entered into the system.
- **Due Date:** Date the reminder was set to be due.

Reminder Search Example



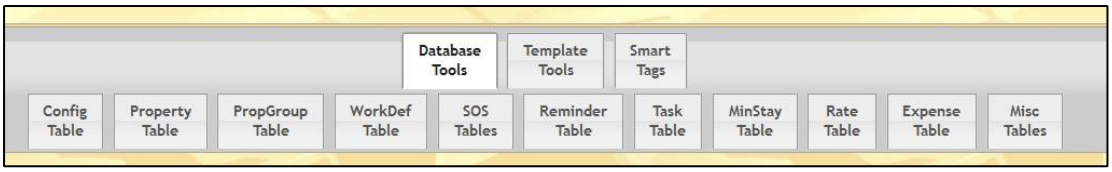
This search illustrated above will select Reminders for the RiverDance Property Group that are associated with just the property group itself (no guest id), that are in a pending state and were due between 2014-0324 and 2014-03-31. There is also an "Export to CSV" button that copies the contents of the search results above to a comma separated file that can be further examined by a spreadsheet like Microsoft Excel.

Chapter 9 - The Admin Page

The **Admin** page is the central place to create and maintain many of the elements that are important to the operation of **MakeRez**. Many of the tabs listed above help to create and maintain tables in your database so you can do things like:

- Add a reminder that a guest would like to have a massage setup when they visit next month.
- Add in a new special promotion so you can track its effectiveness.
- Modify how early the system will send out a welcome email to guests.
- Add new minimum stay criteria for an upcoming holiday.
- and many more

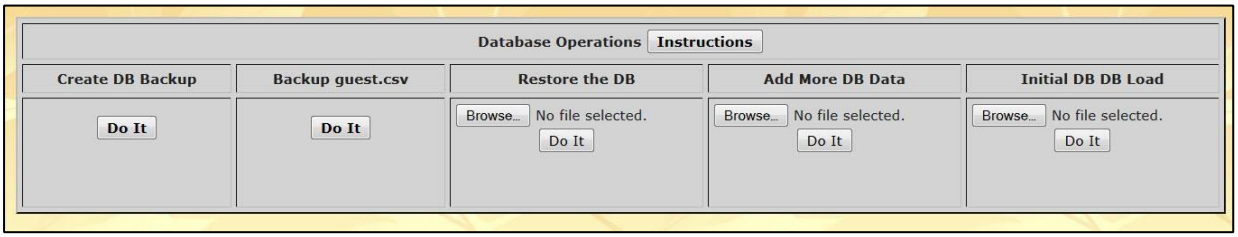
Since many of the Admin functions are very sensitive, only users that are explicitly given "**Admin**" privilege will be able to use the page. A number of the areas within the Admin Page have already been discussed in more detail in the on boarding section so they will either be talked about briefly or skipped here. The tabs arranged across the top of the Admin page represent the following areas:



Database Tools

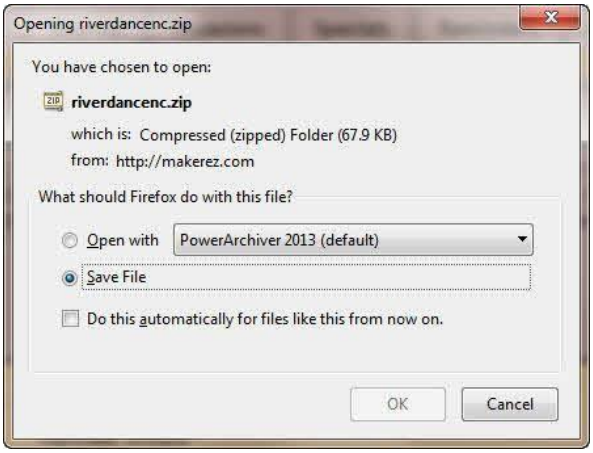
Database Tools provide a number of capabilities to protect your database and get bulk information both in and out of it. The initial setup of your database and your MakeRez environment will be done by our system staff as part of our "concierge service" to help make sure you get up and running quickly. Database Tools provide:

1. The capability of user driven database backup and restore to your local computer.
2. Ability to capture a snapshot of your guest demographic information into an excel spreadsheet which you can then further filter and manipulate to construct mailing lists or simply try to find relevant marketing information.
3. Load the initial data into the database. With **MakeRez** our systems staff does the initial load and setup of your environment to get you up and running quickly.
4. Add additional data into an already existing database.



Create DB Backup

By selecting the **Do It** button underneath the **Create DB Backup** label you are starting the backup of your **MakeRez** database. Once the system has copied all the tables into a single zip file you will be presented with a file open dialog box and you should simply choose to save the backup file on your local computer (Save File button).

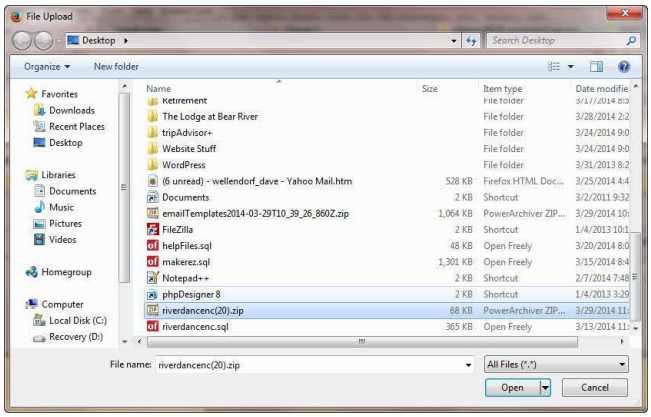


At that time the file will be transferred and staged into the downloads directory. If you are using Firefox, you can then grab it out of the download directory by clicking at the down arrow at the top right of the page and moving the file to the directory you want it to be in.

You should also probably rename the file to include the date the backup file was created to help you understand your backups later.

Restore the DB

By selecting the **Browse** button under the **Restore the DB** label you produce a file selection dialog, like the one below, to select which one of the database backup files you would like to restore. Once you have made that selection the database restore will commence and you can watch the progress log for the database restore operation to see that it completed successfully. This should be done with great care since it will overwrite your current database. It should only be done if for some reason your database has been corrupted and the data that was entered into the database between the time of this backup and now will be lost.



Backup guest.csv

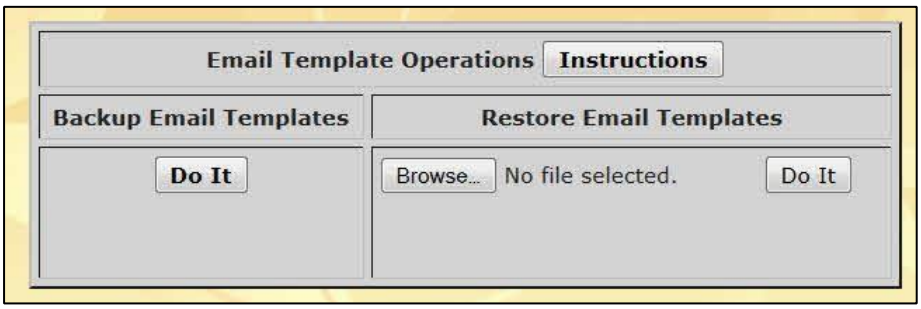
By selecting the **Do It** button under the **Backup the Guest.csv,** you initiate the creation of an excel spreadsheet file on the server that contains all the data that is part of the guest table itself. Once that is completed, you will be presented a file dialog box similar to the one shown above for riverdancenc.zip, but for guest.zip. There you can save the file and use the Firefox controls discussed above to grab the file from the download area and store it where you want. After the file is stored, you should unpack it with your standard unzipping system tools and then you can open it with Microsoft Excel. At that point you can filter the data on a time perspective or other characteristics with Microsoft Excel and use the results to help you with your marketing programs.

Add More DB Data and Initial DB Load

The **Initial DB DB Load** operation and the **Add More DB Data** operate in much the same fashion. The only difference between the two are that the Initial DB Load will truncate the guest, bookings and workflow tables because the data being loaded in is the "only" data that should be there. The **Add More DB Data** operation simply adds additional data on top of what was already there before. The input file for each of these operations should be a file in the CSV format. Before you attempt to add data into the database, you should read through the relevant sections of the onboarding guide.

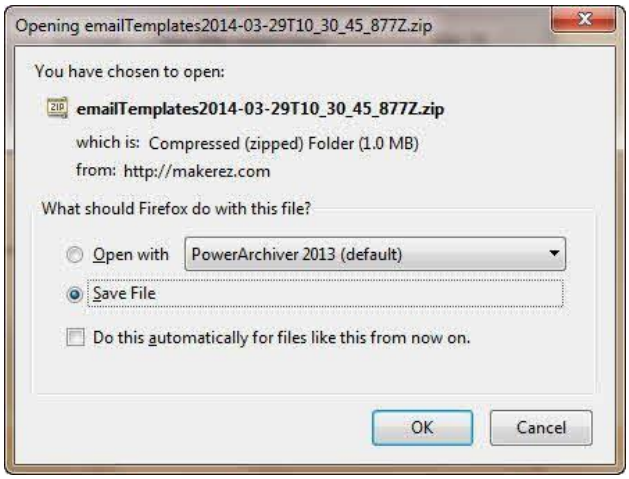
Email Template Tools

Email Template Tools are used first to backup and restore the email templates the drive the Relationship Marketing function. While the system will keep periodic backups of those templates itself, but it is always important to keep another copy on your local computer. A second important use for the tools is that they give you the ability to make customize the template files in addition to adding in supporting files like welcome, contract and directions pdf documents into the template directory in addition to any images you want MakeRez to be able to put in your outgoing emails that are not hosted within some other website. All this is done on your local computer during the on boarding process.

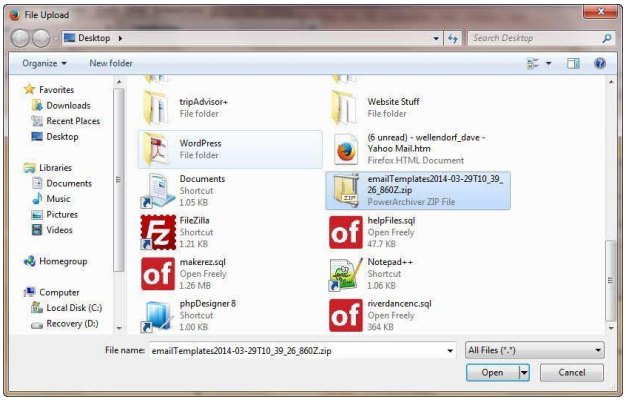


Backup the Email Templates - Simply select the **Do It** button underneath the Backup Email Templates label. Your email templates are stored in the **emailTemplates** area that is part of your sites data storage. When the backup is done all the emailTemplates are bundled together into a zip file. Once the file has been created on the server, it is staged for transfer back to your local computer. When that happens you will see a dialog box, like the one below, that allows you to choose where you want to store the backup.

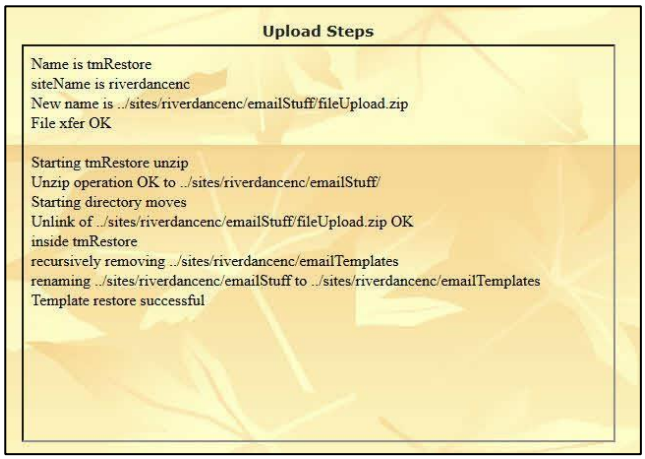
TIP! Since the database containing guest information… is frequently changing, the MakeRez system backs it up every night. The email templates may occasionally change and are not backed up by the system. If you make changes to the email templates, please use this tool to make a backup copy of them.



Restore the Email Templates - If you would like to restore a previously saved set of email templates, you would select the **Browse** button underneath the **Restore Email Templates** label. That would produce a file selection dialog box, like the one below, that you could use to actually select the email template files you would like to restore. This should be done with great care since it will overwrite your email templates.



Once you select the Open button, the template restore will commence. There is an area underneath the controls that keeps a progress log for the template restore. You should examine that and if it indicates there were no problems, your restore was done successfully. Following is an example of how that area showing the progress of the restore operation might look.



Workflow Definitions Table

Workflows are the various actions that may happen as a inquiry/guest moves through **MakeRez**. There are twelve standard workflow steps that are predefined in **MakeRez** and five available workflow steps that can adapted to the way your property operates. Workflow definitions allow you to customize some of the communications you have with your guests both before or after they book. Workflow definitions are most directly seen when interacting with the Workflow tab on the Guest page. Here is the default view of how the Workflow tab might look.

Each workflow has a **definition** associated with it that details how it is supposed to be used. workflow definitions have the following characteristics associated with them:

- **wrkIndex** -A system generated number used to access the workflow definition.
- **name** -The name of the workflow. Also is used in the naming convention for the email templates that are often sent out as the result of a workflow being done.
- **wrkOrder** - The display order of the workflow in the **WorkDef Tab** of the **Admin** page. The display order, as close as possible, should match the order that the typical workflow will be done. If the wrkOrder is negative, then this workflow step will not be displayed.
- **action** - The result of the workflow. One choice is **record** which simply keeps track of which inquiries/guests have had that workflow done. The second choice is **email**, which tells the system to send the email associated with the workflow to the inquiry/guest.

  One example of how this is used is the booked email. After the subscriber enters all the relevant information into the Guest page and saves it to the database, they would select the "Make Booking" check box. That would make the actual booking on the calendar and send a booking email out to the guest with their information about the booking in addition to their confirmation number. The guest is asked to review that information and if they detect any problems to please contact. In addition an updated copy of the MakeRez master calendar is put in a file to be shared with other services like homeaway or bedandbreakfast.com

- **description** - A short description of what the workflow does.

By using the **WorkDef Tab** of the **Admin** page you can setup additional workflow steps by giving them a name, a wrkOrder, action and description. After the wrkOrder is set to a positive number, you can start to use that workflow step with your inquiries/guests. You should make sure that all your wrkOrder values are unique and in the proper display order that starts at 0 and increases by one for the next displayed workflow step.

TIP!

Watch the "**Creating a Custom Workflow**" video in the Video Training Series to see more details on how you can create your own specialized workflows.

When an old workflow is edited, you may indeed be fundamentally changing the meaning of a workflow. And the same set of workflows apply to all the property groups you manage. For example one the standard workflows is keep track of selling a gift card. When folks buy a gift card it is useful to mark that workflow so you have a mechanism to track just who has bought gift cards. But lets suppose you decide to get out of the gift card business and would like to redefine that workflow to indicate the guest had purchased a massage.

By redefining that workflow you in essence "orphan" anyone in the past who has purchased a gift card. So as part of the process of changing a workflow you will be offered the option to delete those previous gift card workflows. The best time to think about your workflows and alter them is before you actually start using **MakeRez** and have guest data saved in the database. You should be very cautious about changing workflows later.

There are twelve standard workflows that have been defined within MakeRez and there are an additional five optional ones that you can define to match the needs of your business. Several of the standard workflows should not be altered since they integral to the operation of MakeRez. They are:

To Edit an Existing Workdef - Select the workdef you would like to change by clicking in its row. Wordef's are displayed in the Admin page **Workflow Tab** in the sortOrder reflected in the table. Workdef's with negative sortOrders are not currently in use. To activate one of those, change its sortOrder to positive. Since managing and changing workdefs are one of the more sensitive areas in MakeRez, please watch the video training on how to edit them. Make the desired changes and finally select **Update this Workdef.**

To Save Changes Made to the Workdef - Make sure you select **Save Workdef** to permanently save your changes to the server.

A Sample Workdef Table

wrkIndex	name	sortOrder	action	description
0	booked	0	email	Make Booking ?
1	contract	2	email	Send Contract ?
2	firstCharge	1	email	First Charge?
3	receipt	4	email	Send Receipt
4	retired	9	record	On Retired List
5	waitList	6	email	On Wait List
6	cancelled	10	email	On Cancelled List
7	giftcard	7	email	On Giftcard List
8	welcome	3	email	Sent Directions
9	noRoom	8	record	On No Room List
10	thankYou	5	email	Thank You Sent
11	recontact	11	Record	On Recontact List
12	paidInFull	-12	record	Paid in Full
13	custom1	-13	record	Custom WorkDef 1
14	custom2	-14	record	Custom WorkDef 2
15	custom3	-15	record	Custom WorkDef 3
16	custom4	-16	record	Custom WorkDef 4

Reminders Table

Reminders can be associated with a specific guest or, if the reminder has a guest id of 0, the reminder is not tied to a guest. Non guest reminders could be something as simple as setting a reminder to place an ad in a local publication by a deadline or to sign up for a business class at the local community college. Reminders include a system generated Id that that is used to access them, a State value (pending or completed), the

date the reminder was entered into the system, the date the reminder is due by, any guest id information that is associated with the reminder, any unit information associated with the reminder and finally a description and comments about the reminder.

A Sample Reminders Table

Index	State	Entry Date	Due Date	Guest Id	Property or Unit	Description	Comments
11	p	2013-11-08	2013-12-01	0		a description 1	avcomment 1
12	p	2013-11-08	2013-12-09	0		a description 2	a comment 2
13	p	2013-11-08	2014-01-07	207	rr	hi there	a comment 3
14	p	2013-11-08	2014-01-24	206	rr	Get 2nd payment	$150
15	p	2013-11-08	2014-03-31	122	tt	a description 5	a comment 5
31	p	2013-11-21	2014-03-31	206	rr	Setup BDAY	5-11-14 Dave
32	p	2014-07-29	2014-09-18	952	rr	rechack	test

- Reminders are created, deleted, edited and marked as complete on the **Reminders Tab** of the **Admin** page.
- Reminders can be searched for using the **Reminder Search Tab** on the **Search** page. Criteria to search for reminders include the guest id the reminder is associated with, whether the reminder is pending or completed, or by date ranges that the reminder was entered or date ranges that the reminder is due by.
- The **Dashboard** page provides a snapshot of a variety important elements and among those is a review of what reminders are pending in the next week and also what reminders are overdue.
- Reminders for a particular guest can also be viewed by looking at the **Reminder Tab** of their **Guest** page.

To Add a New Reminder - Select a reminder to use as a template by clicking in its row. Make the desired changes and finally select **Add a Reminder .**

To Edit an Existing Reminder - Select the reminder you would like to change by clicking in its row. Make the desired changes and finally select **Update this Reminder.**

To Save Changes Made to the Reminder - If you have added a new reminder or edited existing ones, make sure you select **Save Reminder** to permanently save your changes to the server.

Task Table

The primary difference between the Reminders that were just discussed and the Task Table is that **Reminders** are more long term focused (collect the second half of a guests deposit in six months, pay the second installment of your taxes on November 1) and **Tasks** are more short term focused (fix the door to River Rocks). In addition tasks are assigned to a specific person and both their creation and completion times are tracked. When a user logs into the MakeRez system through the Dashboard page, their pending tasks are displayed and they can add comments, mark a task as completed, and save their changes. On the Admin page tasks can be created and assigned, updated and deleted. Following is a sample Task table.

Task Table

Instructions | Save Tasks

To add the first task, insert the values and select Add
To update or delete a task, first select it with a left mouse click.

Index	State	Create Date	Complete Date	Owner	Description	Comments
4	P	2015-10-29 10-12		wellendorfcallie@yahoo.com	callies task	really hard
7	C	2015-11-02 11-01	2015-11-02 12-21	wellendorf_dave@yahoo.com	daves task	really realy
8	P	2015-11-02 11-02		wellendorf_dave@yahoo.com	daves 2nd task	really really really

Periodic Tasks

If you have a task that needs to be done periodically, when it's finished leave it in the C (completed) state and when it is time the task needs to be done again, change the state back to P (pending) and update the information. That will blank out the Complete Date and the Comments field. At that point you can even change who the task is assigned to.

The Expense Table

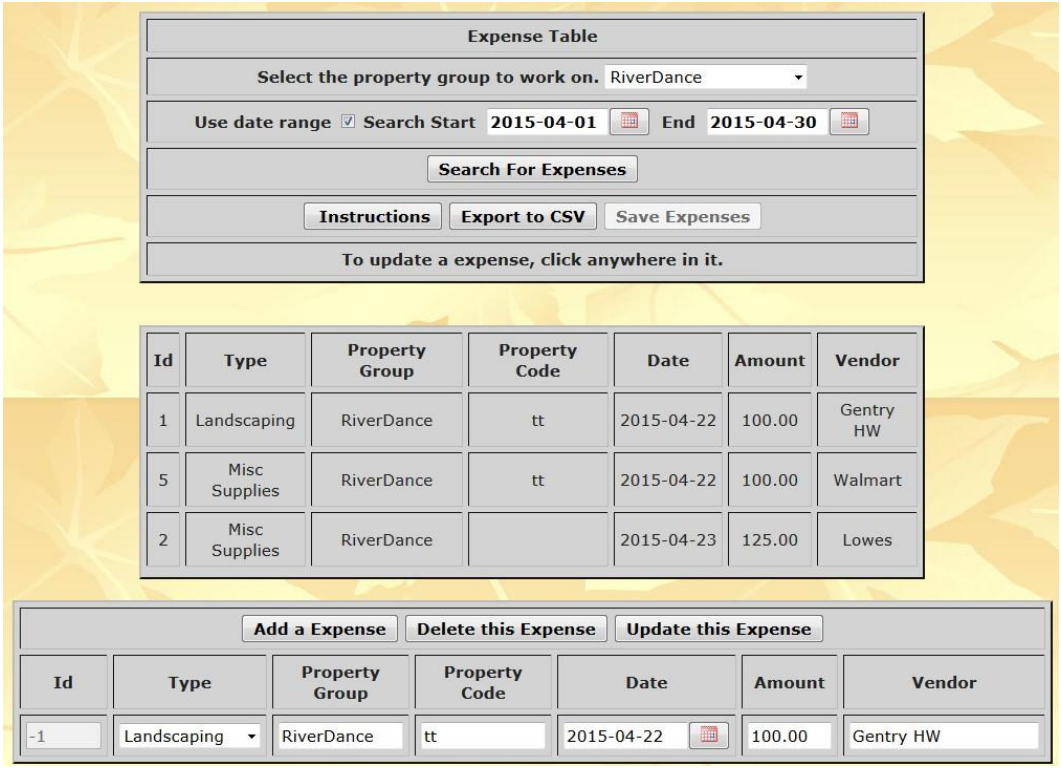
Tracking expenses is an important part of understanding how your lodging business is performing and a critical component in understanding how much of a profit (or loss) you are making. Within MakeRez the **Property Group** represents either a single or group of units that are managed together, often represented by a single customer facing website, owned by a single person, managed either by that person or an agent. So the notion of rolling up expenses to a **Property Group** is used in MakeRez. The Expense Table is managed in the **Admin** page and can be thought of being a three step process.

The first step is to define the types of expenses you are interested in tracking. This is done by updating the information in the **expenseType** table that is discussed in the On Boarding Section. This is done by selecting which property group you are interested in working with, then entering in the optional start and end dates for the expenses that are of interest. Once that is done you can select the "**Search For Expenses**" button to ask MakeRez to look for matches to those criteria in its expense database.

The matches that are found will be displayed, as below, in a row by row listing of the elements of the expense record, second grey area below. If all you want to do is view those expenses, you are done. You can also export those expenses to a spreadsheet by selecting the "**Export to CSV**" button and they will be saved to an Excel compatible spreadsheet file.

If you need to add new expenses, delete old expenses or update previous expenses you click on one of the expenses that are already displayed and that will move that expense down into an editing area, third grey box below.

A Sample Expense Table



To Add a New Expense - Select a expense to use as a template by clicking in its row. Make the desired changes and finally select **Add a Expense.**

To Delete an Existing Expense – Select the expense you would like to delete and click on the "Delete this Expense" button.

To Edit an Existing Expense - Select the expense you would like to change by clicking in its row. Make the desired changes and finally select **Update this Expense.**

To Save Changes Made to the Expense table - If you have changed the expense table by adding, deleting or updating, make sure you click the **"Save Expenses" button** to permanently save your changes to the server.

Chapter 10 - The MakeRez Survey System

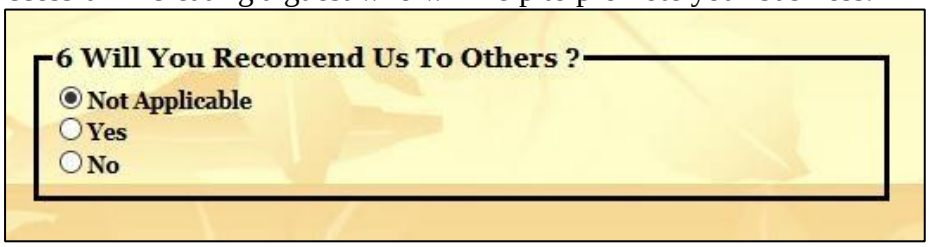
When the **MakeRez** system sends out Thank You emails to your guests, you have an opportunity to invite them to take a 5 minute anonymous survey that will help you better understand the things that are important to them, and how you are doing in meeting those needs. This is done by putting the tag [[SURVEY]] in the appropriate spot in the Thank You email template. You can check the default email templates provided by MakeRez to see an example of how this is done.

Also, the survey system will prevent a single guest from submitted multiple surveys. There are five survey questions that rate your guests perception of your property on a scale of one to five, with five being a rating of excellent and one being a rating of poor. Each of the categories are taken from the ones used in doing **tripadvisor** ratings so they are commonly accepted areas that should be important to your guests. The categories are:

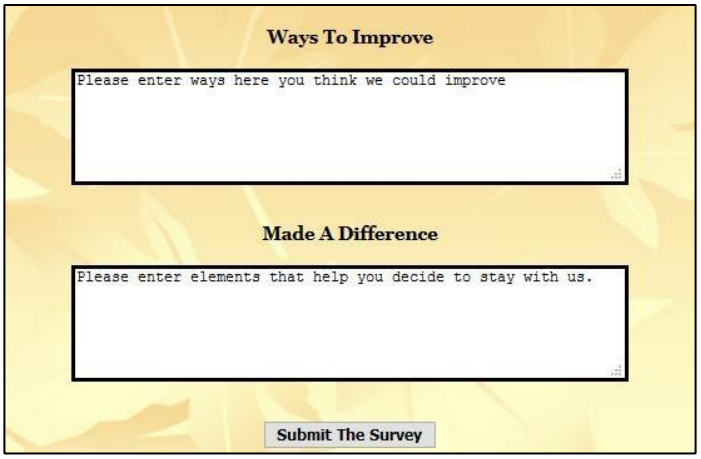
- **Cleanliness**
- **Value**
- **Location**
- **Service**
- **Sleep Quality**

In addition, these five categories are averaged to come up with an overall rating for each guest survey. Below is an example of two of these survey questions.

The sixth question in the survey is by far the most important and is the best test of whether you have been successful in creating a guest who will help to promote your business.

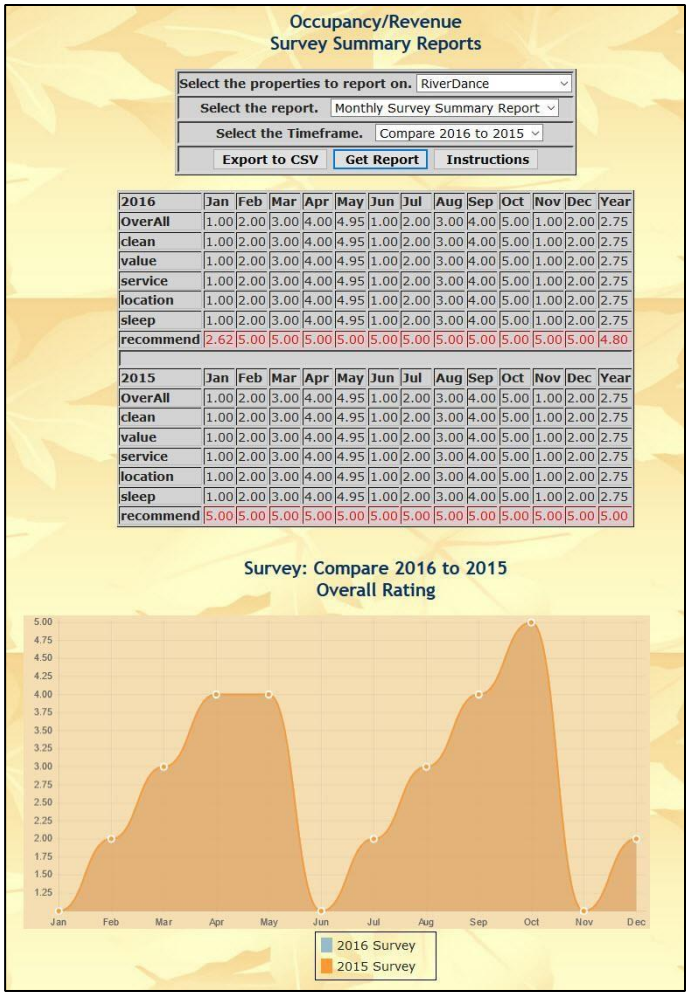


Each survey has two extra comment fields, one to list things you could improve on and a second one to list things they think made a difference in helping them decide to stay with you



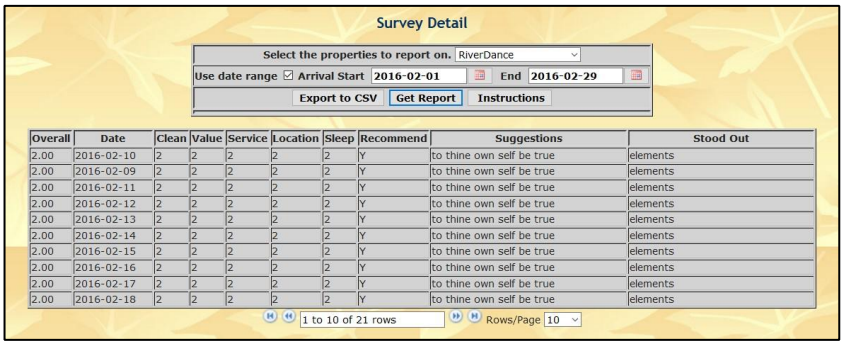
There are two reports that will help you understand your guests feedback. The Survey Summary report offer a month by month summary for each of the five survey categories for each of two consecutive years. With this information you can look for trends or an aberration in the ratings for a specific category. This feedback is critical to understand how well you are meeting your guests needs and will hopefully give you ideas on how to improve. One can look at the month of interest and then look at the specific Survey Detail report for that time frame.

The two examples below of a Survey Summary and Survey Detail report have been created with synthetic data that was entered into the database by importing a spreadsheet. The data was used solely for the purpose of making sure the survey system and the Survey Summary and the Survey Detail reports were working properly.



2016	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
OverAll	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
clean	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
value	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
service	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
location	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
sleep	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
recommend	2.62	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	4.80
2015	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
OverAll	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
clean	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
value	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
service	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
location	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
sleep	1.00	2.00	3.00	4.00	4.95	1.00	2.00	3.00	4.00	5.00	1.00	2.00	2.75
recommend	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00

The Survey Detail report shows the information from each individual survey. The report can be sorted in different ways by clicking on the survey category (like Value) to sort the report by that category. This will allow you to look at both the lower ratings and the higher ratings for that category and any associated detail from the "Suggestions" and "Stood Out" fields that clarifies the ratings. By default the Survey Detail report show only ten surveys at a time. You can page through the results by selecting the << and >> to go forward or backward a page. You can also adjust the number of survey results that are displayed on a page by altering the Rows/Page value.



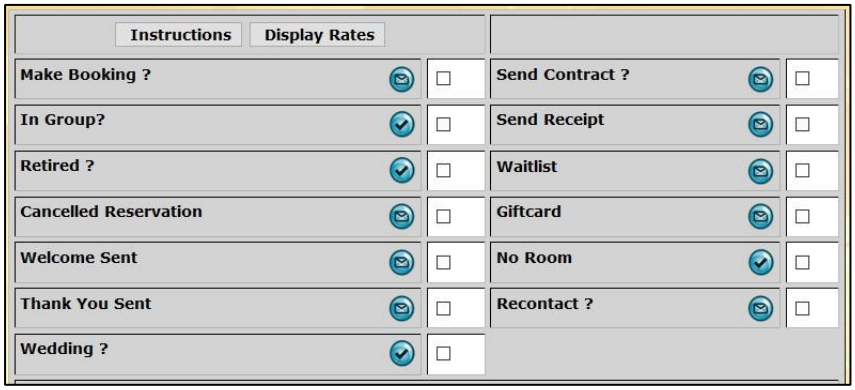
Overall	Date	Clean	Value	Service	Location	Sleep	Recommend	Suggestions	Stood Out
2.00	2016-02-10	2	2	2	2	2	Y	to thine own self be true	elements
2.00	2016-02-09	2	2	2	2	2	Y	to thine own self be true	elements
2.00	2016-02-11	2	2	2	2	2	Y	to thine own self be true	elements
2.00	2016-02-12	2	2	2	2	2	Y	to thine own self be true	elements
2.00	2016-02-13	2	2	2	2	2	Y	to thine own self be true	elements
2.00	2016-02-14	2	2	2	2	2	Y	to thine own self be true	elements
2.00	2016-02-15	2	2	2	2	2	Y	to thine own self be true	elements
2.00	2016-02-16	2	2	2	2	2	Y	to thine own self be true	elements
2.00	2016-02-17	2	2	2	2	2	Y	to thine own self be true	elements
2.00	2016-02-18	2	2	2	2	2	Y	to thine own self be true	elements

Chapter 11 - Email Communications

Communications is at the heart of building relationships. One of the central features of MakeRez is the ability it gives you to easily communicate with both folks who have either inquired about a stay at your properties or who have actually made a reservation. These emails come in two different forms, either system generated or subscriber generated. While the MakeRez system can handle both Html (formatted) and text based emails, the following discussion will focus on the Html approach since it offers more powerful ways to engage with your customers.

System Generated: When setup in the config table, the system will automatically send out **welcome** emails, **thank you** emails, **reminder** emails, **extendAStay** emails, **inquiryReminder** emails and **recontact** emails to your guests. For example, **welcome** emails can be used to provide directions, inform guests about check in or check out times, let them know about the closest grocery store and much more. **extendAStay** emails offer a guest the option of extending their stay, either before or after their reservation, if the unit they are in is available. Information about the emails that are actually sent out is kept in the **autoActions** part of the database and is viewable in the Dashboard page. In addition the MakeRez system has the ability to gather information from services like HomeAway, Bed and Breakfast.com, FlipKey and others which send you inquiries. An automatic response with links to your website, availability page, reviews,… is sent out within 15 minutes of the inquiry

Subscriber Generated: Many of the guest emails are sent out in direct response to a subscriber initiated action such as making a booking for a guest on the calendar, or sending out a contract or a receipt. These emails are initiated from the workflow tab on the guest page. Below is a typical snapshot of that tab.



The check boxes that have a round icon with an **envelope** in it generate guest emails when they are selected. If a check box has a round icon with a **checkmark** in it, selecting it will simply mark it as belonging to a specific list like the list of guests we have told there is no unit available for the dates they were interested in. When an action with an associated email is selected, the system searches for an email prototype to use. It then massages that prototype by adding in information (like the guest name) from the database or even information that was derived from the database (like the total rent). Finally that email is sent out to the guest and a copy of it is kept so you can review it later by going to the Documents tab on the Guest page. For example, the name of one of the common email templates is booked.txt. It is used to confirm the guests stay when a booking is made and also ask the guest to look at the booking information and verify its correctness.

Standard Email Messages

In MakeRez there are a variety of standard messages that will be sent out depending on the actions that you and your guests have taken. The messages that are marked with a ***** are all initiated by the subscriber through the workflow page, and are automatically cc'd to the appropriate contact. The messages that are marked with a **?** are all initiated by the MakeRez system itself. Some of those are initiated during nightly maintenance, while others are sent out when inquiries are received.

1) *** booked** – This is sent out when you select the "**Make Booking Workflow Task**" and contains information that has been entered into the guest record which you would like the guest to verify. It also contains their confirmation number (guest number) to make later communications easier.
2) **? reserved** – This is sent out when the guest does an internet booking through your property website. It contains information that has been entered into the guest record which you would like the guest to verify. It also contains their confirmation number (guest number) to make later communications easier. The booked and reserved messages can be identically worded or could be different if that makes sense.
3) **? inquired** – This is sent out when the guest does an inquiry through the internet booking part of MakeRez on your property website. It asks the guest to verify the information they have sent with the inquiry is correct.
4) **? marketing –** This is sent out by the **mrCronInquiry** process when it automatically handles an inquiry email from one of the services that you are using for advertising (like HomeAway or Bed and Breakfast.com).
5) *** contract** – This is sent when you select the "**Send Contract Workflow Task**" and send the contract for the customer to review and sign via email.
6) **? welcome** –Automatically sent a configured number of days before the guests arrival. If should contain directions, check in procedures, area attractions,… and other important information about their stay. If the date the reservation was made is close enough to the arrival date an immediate welcome message is sent out as part of the booking process.
7) **? thank you** – Automatically sent a configured number of days after a guests departure thanking them for staying at your property. A perfect time to provide them with some marketing information to pass on to friends and ask them to consider reviewing you.
8) **? reminder** – Automatically sent a configured number of months after a guests stay to remind them that you would love for them to come back for another visit and refer you to others.
9) **? inquiry reminder** - Automatically sent a configured number of months after an inquiry, that hasn't turned into a booking, was made.
10) *** wait list** – This is sent out when you select the "**waitList Workflow Task**" and simply confirms to the prospective guest that you have added them to your wait list and allows them to verify the information you have about their request. When a guest is doing an inquiry using the embedded booking widget they can ask to be added to the wait list. In this case no confirming email is required.
11) *** receipt** – This is sent out when you select the "**Send Receipt Workflow Task**". If will either a summary of the financial part of a guests stay or a more detailed view of the stay if you use the transactions part of the Guest page.
12) **? extend a stay** – Automatically sent a configured number of days before a guests arrival when it detects that there is a opening in the unit they have reserved either immediately before the arrive or upon their departure. Lets them know that they could "extend" their stay with you. Would be a good place to put a special offer to entice them to extend.
13) *** cancelled** – This is sent out when you select the "**Cancelled Reservation Workflow Task**" to notify someone that you have cancelled their reservation. In addition when a reservation is cancelled, if there are guests with reservations that start or end close to the cancellation dates a special **cancelExtend** email is sent out to them asking them if they would like to extend their stay. In addition if there are potential guest who are on the **wait list** who are interested in the time of the cancelled reservation, a special email is also sent out to them.
14) **? recontact –** This is sent out when you put someone on your "recontact list" by selecting the "**Recontact Workflow Task**". The recontact email is sent out immediately when someone is added to the list. Within the config table preset days are setup for when additional recontact emails are sent out. When all the recontact emails have been sent , the prospective guest is put on the Retired list.

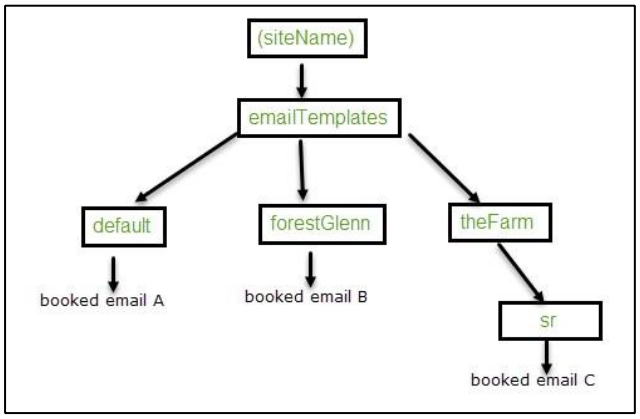
    recontact1-5 – To add a little variety to the recontact process, you can define up to five separate emails which will be sent out in sequence when the recontact intervals elapse. That way the recontacts don't seem quite so canned.

A Scenario

Let's assume that you are managing two properties with MakeRez. One is a sweet bed and breakfast called Forest Glenn and the second is a group of cabins that you refer to as The Olive Farm. The property name for Forest Glenn would be ForestGlenn and the property name for The Olive Farm is TheFarm. If you send out a booked email for ForestGlenn it would probably be significantly different than the ones you might send out for TheFarm. In addition, let's also assume that one of the cabins in The Farm (Serenity) has a hot tub so you need to inform guests about it. So depending on how your properties are setup, you may need a single booked.txt to use for all of them. Or you may need one to use with ForestGlenn and another to use with TheFarm. You may even need to have a specific booked.txt email that contains information about the hot tub to only use when someone books the Serenity cabin at TheFarm. Fortunately MakeRez can handle all that.

Search Strategy

Consider the diagram below. The Serenity cabin at The Olive Farm, with a two letter property code of sr, has its own booked email (C) since it needs to have hot tub instructions. The other cabins at The Olive Farm use the default booked email (A). But at Forest Glenn B&B, they use a booked email that is specific for them (B). The search strategy for Serenity when the system is looking for the right email prototype to use for a particular email, is to first look for that prototype in the sr directory, failing that it looks in TheFarm directory and failing that it will find it in the default directory. More detail about how to setup these directories can be found in **Appendix C** of the manual.



Html EMails

Most modern email systems provide the ability to display either text based emails or emails that are formatted using html tags (the same information used to format a web page). Using html formatting you can improve the readability of emails by having words in **bold**, *italic*, underlined, ... Also you can draw your guests eyes to a specific section of the email by making the font bigger, or even a different color. Html formatted emails can have links embedded in them that, when clicked, will open up the default browser and take guests to a specific web page. In addition html emails allow you to visually engage folks by providing images that can capture their attention. Within MakeRez these html emails are stored as prototypes with places to put important information, like the guest name, called out.

In our email system the string of characters [[NAME]] will be replaced by the guest name that is pulled out of the database. These strings, including the [[and]] characters are called a **Replacement Tags** or simply Tag for short. There are a number of different types of Tags that MakeRez uses to make customizing your emails as simple as possible.

1. **Database Tags:** Database tags are directly entered as guest information into the database and are things like the [[ADDRESS]] and the [[STATE]].

2. **Derived Tags:** Derived tags are information derived at the time the email is being sent out and are things like the [[STAX]] (state tax) or a [[RECEIPT]].
3. **Table Tags**: Table tags are information that is pulled out of things like the Property Group Table [[MARKETING]], the config table [[MGREMAIL]] (managers email), or the property table [[PROPUNIT]], the name of the unit that was rented.
4. **Smart Tags**: Smart tags are custom tags that a subscriber can set to contain the html information for an image to be included in a email, or a link to be included, or simply a bunch of text that describes a special offer. More on their use later.

The net of all this is you get to send interesting emails that will attract people's attention and motivate them to bring their business to you. Below is an example of a marketing email sent to a prospective guest.

A View From The Deck

Greetings From RiverDance

This is an automatic email to provide information we thought would be interesting about RiverDance. We will be contacting you in person as soon as we are able to answer any questions you may have. Please feel free to phone Callie Wellendorf at (847) 809-3098 and we would be happy to help you.

RiverDance is a captivating blend of the best in a traditional Vacation Rental and an up scale Bed and Breakfast. As our guests, nestled on a quiet mountainside, high above the river, you will find your home away from home. Experience the outdoors at its best, day or night, from our Carolina Porch with its barn board fireplace. Relax in front of the massive Arts and Crafts fireplace in the inviting great room, and rest comfortably in your own private quarters. We have consistently been rated the #1 Bed and Breakfast in the Hot Springs, NC area and indeed all of Madison County.

Please take a look at the information that we have gotten from your recent inquiry. Could you please review it to be sure that it accurately reflects your inquiry. We have attached information about our reviews, pictures of RiverDance and a sampling of things to do.

We look forward to your sharing all that RiverDance and the surrounding area offers.

An inquiry has been made for: John Amoss

Please note that ATT and T-Mobile cell services has very limited coverage in the mountains.

Email: wellendorf_dave@yahoo.com
Cell Number: 8282062725
Number of Guests: 2
Check in Date: Thursday March 10th, 2016 , Staying: 3 Night(s)
Checkout Date: Sunday March 13th, 2016
Your inquiry number: 282
Your comments: Not Provided

Check out our tripAdvisor reviews and our availability page

Cheers

Callie Wellendorf
wellendorfcallie@yahoo.com
(847) 809-3098

Please check out Our Website for up to date information.

For weddings and events check out The Lodge at Bear River Website
Please like our RiverDance Facebook page
and the Lodge at Bear River Facebook page

This is an automatic email. Please dont reply to this email if you have questions please email wellendorfcallie@yahoo.com.

The Email Process

Let's assume that you have just booked a new reservation and the confirmation email needs to be sent out. Go to the Guest Page workflow tab and select the "Send Contract" checkbox. makRez does the following:

1. First it executes a search strategy as described above to find the right contract.txt email prototype..
2. Next the system will inspect the contract.txt that was found for the presence of a <html> tag to decide if it either a plain text or an html prototype.
3. The system will process the contract.txt file to look for database tags like [[CITY]] and replace them with the corresponding values from the guest's database record.
4. If the email prototype contains html, a second copy of the file will be created with all the html tags taken out. When the email is actually sent out, both the plain text version and the html version will be included and the guest's email client will decide which version it prefers. If the email prototype contains just text it will be sent out by itself since there will be no corresponding html version.
5. If the email being sent out is a contract, MakeRez will look for a contract.pdf file. This file will be "attached" to the email and in this case acts as the guests contract that we are asking them to review.
6. Finally, MakeRez will also look for a contract.pdf file in the same place it found the contract.txt file. If found, it will simply "attach" that file to the email and send the email out.

Database Tags

Database Tags are also used to describe fields from your guests' information that are stored in the database could be included in an email that will be sent to them. This information is collected when you **MakeRez** enter guest data into the **Guest** page and is also collected when a guest books a stay online through the website booking widget that **MakeRez** provides for integration into your properties website. Tags always begin with a [[and end with a]] to differentiate them from normal text and are simply used as placeholders where the appropriate guest information should be substituted. For clarity the [[and the]] have been eliminated in the table below. The tags are used in email prototypes to customize them for this particular inquiry/guest. Tags marked with a * can be used in custom emails.

Tag Name	Tag Value	Tag Name	Tag Value
NAME *	Name of guest	**TCLEANING**	Tax cleaning?
EMAIL *	Email of guest	**STAXRATE**	State tax rate %
STREET	Street address	**CTAXRATE**	County tax rate %
CITY	City address	**STAX**	State tax
STATE	State address	**CTAX**	County tax
ZIP	Zip code	**TOTALBILL**	Bill total
CELLNUM	Primary cell phone	**PROPUNIT**	Unit rented
CELLCARRIER	Cell phone carrier	**CONFIRMATION**	Confirmation #
ALTNUM	Optional alternate phone	**EXTRA**	Extra charges
ADULTS	Number of adults	**TRANSACTIONS**	Trans. detail
KIDS	Number of children	**SUMMARYTRANSACTION**	Trans. summary
PEOPLE	Total number of guests	**MGRNAME**	Mgr name
PETS	Pets coming? (Y/N)	**MGRPHONE**	Mgr phone
NIGHTS *	Number of nights	**MGREMAIL**	Mgr email
CLEANING	Cleaning rate	**WEBSITE**	Website URL
COMMENTS	Comments added	**REVIEWS**	Reviews URL
PROPERTY *	Property name	**LOCATION**	Property location
ARRIVALDATE *	yyyy-mm-dd of arrival	**WELCOME**	Welcome text

DEPARTUREDATE	yyyy-mm-dd of departure	**MARKETING**	Marketing text
DEPOSIT	Amount of the deposit	**TAGLINE**	Tagline text
TOTALRENT	Total rent		

Email Helper

The emailHelper application assists you in making sure that the emails you send to your inquiries/guests contain the proper information and are presented in a professional fashion.

Most of the emails that the system sends out at your request (contracts, booking confirmations,..), or sends out on its own (inquiry responses, welcomes and thank yous, ...) use Tags which are placeholders where information both from a guests database entry and derived information can be inserted before the email is sent out. So it's important to be able to take the base set of email templates that MakeRez provides and further customize them to better reflect on how your property operates.

The **emailHelper** application allows you to do exactly that. With it you can load a copy an initial version of an email template, do your edits, test the edits out with specific guest information and if the template is correct, you can also save it to the server. Those steps are done by entering in the name of the section of the email templates in the "**Email Section**" area. These areas are typically like default, or custom. After that selection is made the names of the email prototypes in that section are listed in the drop down list.

Once you have used that drop down to select the email template you want, say "booked.txt", select the "**Load From Server**" button to load the prototype from the server and display it on your screen in the **Email Prototype** text box. There you can make a variety of edits to the prototype using your keyboard. Selecting a section of text is done by highlighting it by clicking and holding the left mouse button. When the section is highlighted you can copy it by typing in ctrl C (simultaneously holding down the ctrl key and the c key) or cut it out by typing in ctrl X. Finally if you want to insert the highlighted section somewhere else in the templates, click the left mouse button at the insertion point and type in ctr V. The text box that is used to do the editing also has a spell checker, so if you see words that are underlined with a wavy red line it is an indication that they might be misspelled.

Once the edits are finished, select the "**Do Merge"** button and the altered template will be sent to the server and have the tags replaced by actual data from guest number 1 in the database. The "**filled in**" template is then transferred back to your local computer and displayed in the "**Email to be Sent**" text box for review. If there are still more edits to be made, go back to the "**Email Prototype**" text box to make them and when done "**Do Merge**" again. Go through this process until you are happy with your work. Finally select the "**Save Changes To Server**" button and the altered email prototype will be finally saved on the server. You can also select the "**View as Html**" button to see how the resulting html email will look. As a further step you can even

select the "Test Email" button to actually send a copy of this email to guest number one in the database. This should be a fake entry with your contact information and email so the test emails go to you.

You should look at the Email Templates section of the on boarding guide in this manual for more detail on how to manage the email templates

Custom Emails

Custom emails are handled exactly like transactional emails like the booked email. They are kept in the custom sub-directory of the emailTemplates directory. Custom email are originally created on your local computer (perhaps by copying one of the transactional emails) and then using the **emailHelper** page to transfer it back down to the server and also to make changes to it. The first is the creation of the body of the custom email itself which is typically done through the emailHelper page described above. Here is an example of one such custom email.

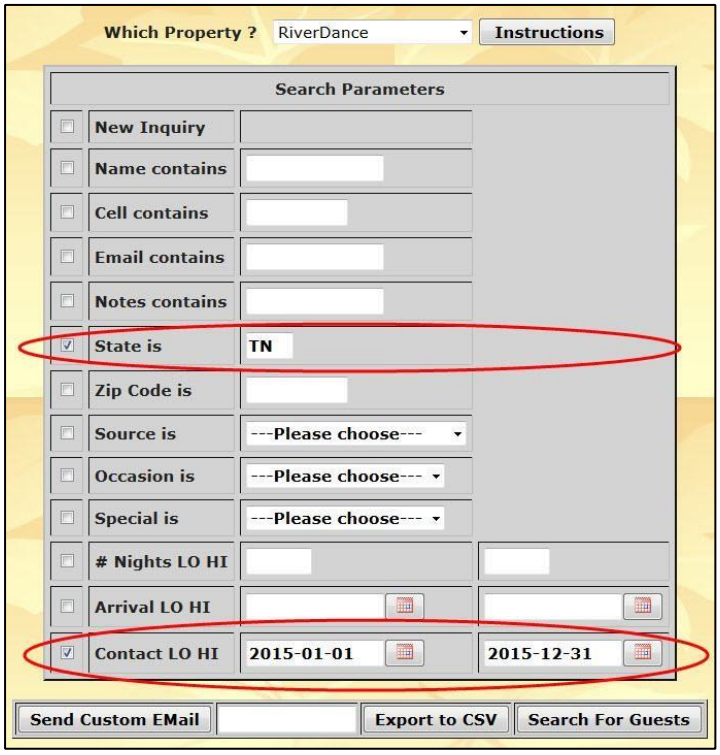
```
<html>
<body>
[[HEADER]]

We'd like to thank you for sharing [[PROPERTY]] with us during your recent visit. We really appreciate the way that guests share their experience with their family and friends. There is no better feeling that hearing from a new guest that you recommended us to them. Thank You, Thank You, Thank You.<br><br>

One of the most important sources of information for out prospective guests is our reviews. We have been blessed by the reviews that guests have written about [[PROPERTY]] in tripAdvisor and very often hear new guests talk about seeing our reviews and how important that was in helping them make their decision. If you would like to add in your thoughts to the reviews please go to: <a href="[[REVIEWS]]">Our Reviews</a><br><br>

Another important place to put reviews is <a href="http://bit.ly/1n25xUI">Google Local Search</a>. That helps folks who are "googling" our area  to find out about [[PROPERTY]] and see your review. This is an place where people are increasingly looking for information about places like [[PROPERTY]].<br><br>

We are always interested in what we could do to make your stay here even better. So if you have any suggestions on how we could improve, please let us know.<br><br>

We look forward to continuing to share our little piece of the mountains with you in the future. We have attached a copy of our [[PROPERTY]] portfolio to this email and would appreciate you passing it on to friends, family and others that might be interested in a visit.<br><br>

[[FOOTER]]
</body>
</html>
```

However it is also useful to target a specific group of your actual or prospective customers and do more of a mass mailing to entice them to come visit your property. One way we have done that at **RiverDance** is to declare that March is Tennessee month and make folks from Tennessee a special offer. There are two places where we work on custom email in **MakeRez**. The first is the creation of the body of the custom email.

There a variety of custom emails can be defined, modified and deleted when no longer needed. Custom emails can also have Tags that will be replaced with emails mentioned above. This are such things like the availability page of your website,.. Check out the **Tags Table** to see what tags are usable in Custom emails.

Once you have created the body of a custom email, you have to decide which of your guests should be targeted to receive that email. This is the second aspect of custom emails, the distribution list. The logical place to do the targeting is on the Search Page. There you have the ability to select a group of guests based on common demographics. In the case of Tennessee Month we would like to send out the email to folks from Tennessee who either visited us or inquired about a stay at RiverDance during 2015. That can be done in the Guest Search Tab in the following way. First select **RiverDance** as the property group of interest.

Next check the "**State is**" check box and supply the two letter abbreviation for Tennessee, TN. Finally, select the Contact check box and indicate the range of contact dates are between 1/1/2015 and 12/31/2015.



When you setup for the search is done, choose the "**Search For Guests**" button to actually do the search. That presents a table of matches for the search. At that point, you can choose the "Export to CSV" button if you want to work on the spreadsheet yourself or you want to import it into an email campaign program like mailChimp or Constant Contact. For medium sized campaigns, ~ 200 emails, you can use MakeRez directly by typing in the name of the campaign (in this case TENNESSEE) and clicking on the "**Send Custom EMail"** button.

Email Problems

Are all the emails you enter into the system correct? Occasionally the right email address gets entered incorrectly, or the email address a customer gives you is misunderstood. Even more commonly, people will change their email address and the one you have is no longer valid. When sending transactional email, like a thank you email, or custom emails out it is important to have the best set of emails possible.

To accomplish this the MakeRez system implements a feedback loop that notifies it when an error is detected when sending an email. When an error occurs, the system will change the email address to invalid@invalid.org. The cause of the problem and the original email mail address along with the fact the change was made will be put into the notes field for the guest. In addition an addition to the autoActions field will be made that also describes the change.

You can use the Search Page and do a search for guest with the email address "invalid@invalid.org" to see which guests email addresses have caused problems. You could also do a search using the notes field and look for the word hard_bounce or spam,... to see what emails have been rejected for that particular reason.

Chapter 12 – Access Control

MakeRez requires each user to login to use it. This allows you to connect you to the database that controls your properties. You may have a number of folks in your organization that need to work with MakeRez. Each of them should be issued a personal login/password combination. They should be instructed to reserve those logins for their personal use. Users of MakeRez's are separated into several types. The first type is CALENDAR where the user can be restricted to only read the data on the Calendar Page. These users cannot access any other page within the MakeRez system. This type of access is typically used by cleaning folk who need to view the calendar to see when turnovers are needed and to see a little bit about the guests in case they need to interact with them. The second user type is **CLIENT** where users have access to all the functions on all of the MakeRez pages other than the Admin page. The Admin page is used by your account administrator to configure and maintain your account. A second type of restricted user is one with **CALENDAR** access. A special type of **CLIENT** user can exist that is only given read only access to the MakeRez data. They can access all the MakeRez pages (other than the Admin page) but they cannot make any changes to the guest data.

The **ADMIN** user is given privileges to maintain and to configure the MakeRez environment for your properties. There should only be one person with this level of access and their login information should not be shared. By allowing multiple people to write client information to the database MakeRez allows a variety of folks in your operation to access and update reservations. In unusual cases there could be an issue with this. Suppose A reads a specific guest record, and intends to change it. A short time later B does the same and reads the same data. A bit later A makes their changes and saves the data. After that B does the same. But what has happened to A's changes? They have been lost since they were overwritten by B who never knew those changes were there.

DEMO users. When your staff are first learning how to use the MakeRez system it is best to modify the **CLIENT** user privileges by also adding them to the DEMO group. That will not allow their actions to accidently send our any emails to your guests.

(Not currently in production). MakeRez handles this by starting a 5 minute timer (much like a system for buying tickets) and coaching the user that their changes must be made before the timer expires. While the timer is running, that specific guest info page is locked and no one else can access it. Once the guest record is saved and the timer is cancelled, other users can access that record. If the time expires, the user who had the lock will be notified and taken to the new guest part of the guest page, the lock will be released and other guests can access the record.

Each lock will have a time associated with it that is the time the lock was created. To handle a variety of conditions, such as losing network coverage that would leave the lock in place, the following will occur. Since locks run for five minutes, a system routine will run every 15 minutes and look for stale locks. Guest records with a stale locks will be unlocked.

Appendix A – Exporting Your Data

One of the key design goals for MakeRez was to enable it to easily integrate with accounting software, email campaigns, other calendaring or booking sources,… So MakeRez is different than proprietary systems that try to lock up your data so it is extremely difficult for you to leave since you have to leave your data behind. On many of the MakeRez reports and searches there is an "export to csv" button that copies the report or search into a comma separated file that should be usable in any spreadsheet you work with. But even more important, this comma separated file is the linkage between MakeRez and email campaign software like Constant Contact and MailChimp. For example, suppose you want to create a special email campaign that targets folks in your database that you have had to turn away because your property simply had "no unit" during the dates they were requesting. They have already shown they were interested enough in your property to make the request, so they might be a good group to send a special offer to, or to let them know about some of the events that are happening around you in the next few months.

Let's do it for folks who we have had to turn away in the last year. You next create a Workflow Search that asks for potential guests who are on your "no unit" lists, one of the workflow steps that MakeRez can track. But only for the folks that have gone onto that list in the last year. Once you execute that search you will get a listing of potential guests that you have turned away in the past year because you simply had no unit. Finally select the "Export to csv" button and a comma separated (spreadsheet) file will be created with that data in it.

Depending on the software you are using for the email campaign, you will need to massage this spreadsheet a bit (typically the name field needs to be split into two fields, first name and last name). Within the email campaign software, create the list itself that you will use to send the email to (like an empty distribution list). And then you can use the email campaign software to import the MakeRez contacts into that list. Construct your email, send it off and wait for those new inquiries to start coming in.

MakeRez also contains another way to export all your guest/potential guest demographic data. On the Admin Page there is a tab labeled "Backup guest.csv". This creates a csv file with all that guest demographic data from the database that you can use to analyze your guests further or feed into other software.

For more information on how to export data from **MakeRez** to a variety of applications, simply Google the application name followed by import Excel. I.E. for Constant Contact you could Google "Constant Contact import Excel". Here are support articles that detail exactly how to do this type of import from MailChimp, Constant Contact and QuickBooks.

Constant Contact

http://support2.constantcontact.com/articles/FAQ/3839

MailChimp

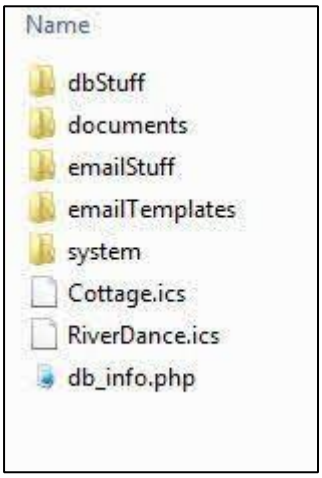
http://kb.mailchimp.com/lists/growth/import-subscribers-to-a-list

QuickBooks

http://support.quickbooks.intuit.com/support/pages/inproducthelp/Core/QB2K12/ContentPackage/ThirdParty/Excel/ov_msimport.html

Appendix B - Setting Up Your Data

When you subscribe to **MakeRez**, there is a start up fee that enables you to send us (typically via email or through a cloud based storage service like box.net) a complete copy of your data. We will take that data, massage it if required, and do the initial data load into the **MakeRez** database. In addition there is a variety of information specific to your implementation that is not kept in a database, but exists in a file structure that is specific to you. Your non-database information is kept in a "sites" directory structure that is keyed to the name of your database file. So for RiverDance our non-database information is stored in a "riverdancenc" directory. Here is an example of just how that directory structure might look.



The **sites** structure has a variety of files and additional directories in it. The ics files are calendar files that allow you to have multiple websites displaying your up to date calendar without doing the additional work of entering in new calendar information manually into those additional websites. The db_info.php file contains information that **MakeRez** needs to be able to connect to your database and access your data.

The two directories **dbStuff** and **emailStuff** are work areas that are used when the user backs up and restores both the database and the email template files. The **system** directory is where the daily and weekly backups of the database that the system generates itself are stored. Since the email templates are only changed via direct user action, there is no need for a continuing system generated backup of the email template files. That should be done by the user themselves via the **Backup Email Templates** section of the **Admin** page only after the user has made changes that they want to protect.

The **documents** directory contains the files that have been emailed to your guests so you can quickly review them by using the **Communications Tab** on the **Guest** page.

Appendix C - Getting Started With MakeRez

Firefox is the browser used to develop **MakeRez** and the only one it is currently supported with. It will be important to make sure when you run MakeRez that you are running it through **Firefox** because one of the first things we will probably ask you to do is to try to replicate your problem using Firefox. You will need to download and install **Firefox** from:

http://www.mozilla.org/en-US/products/download.html?product=firefox-stub&os=win&lang=en-US

Embed the desktop/mobile calendar widget in your property website, It should handle desktops, laptops, tablets and phones. Here the siteName and the propGroup would be the ones appropriate for your property.

```
<iframe
        src="http://www.MakeRez.com/dev/mrCalendar.php?propGroup=RiverDance&siteName=riverdancenc
        &background=HEXF9E4A5"    width="1000" height="1300" scrolling="auto"
        frameborder="1" onload="closeProgressIndicator();" > </iframe>
```

The above code will embed the traditional month at a time desktop calendar or the week at a time mobile calendar into your website.

If you would like to use the "**hidden**" calendar discussed in Chapter 0 that doesn't expose the dates that your property is actually booked. It allows potential guests to check for the availability of specific stays as below. When the "Check Availability" button is selected, information about the units that are available are displayed.


```
<iframe
        src="http://www.MakeRez.com/dev/mrCalendar.php?propGroup=RiverDance&siteName=riverdancenc
        &background=HEXF9E4A5&calendar=hidden"    width="1000" height="1300" scrolling="auto"
        frameborder="1" onload="closeProgressIndicator();" >
</iframe>
```

.

Appendix D – The Database

Table	Description
bookings	Main table that feeds the calendar. One entry per unit per day booked.
config	Single entry with many high level configuration switches
errorsAndWarnings	Table that keeps track of errors for the systems staff to analyze
errorsAndWarnings1	Table used to limit the growth of the errorsAnd Warnings table.
expenses	Expenses entered for your properties. See the expense table in the Admin page.
expenseType	Categories of expenses. Maintained in Misc table Tab of the Admin page.
guest	Contact information for each guest
log	Recording of each database command.
log1	Table used to limit the growth of the log table.
minStay	Minimum stay criteria. Maintained in mainstay Tab of the Admin page.
msgFiles	Message to be sent out as text messages. Communications Tab of the Guest page.
occasions	Occasions guests are coming for.
properties	The individual units/rooms/cabins/suites that make up your business.
propGroup	A group (perhaps one) of those units that are managed and marketed together.
propTranslate	Table to assist in handling automatic inquiries and bookings from services like HomeAway.
rate	Rates per night you are charging.
reminders	Reminders of actions you need to take
sources	How guests were referred to us.
specials	Specials guests are taking advantage of.
transactions	Individual guest transactions.
transType	The transaction types handled in the transaction table. (rent, cleaning, credit cards,….)
workDef	The workflow definition tables (contracts, bookings, welcome emails, …)
workflow	The workflow table to indicate what events have happened with a specific guest.

Appendix E – Handling Gift Cards

MakeRez can handle a variety of financial reports to help you understand how well your business is operating and to help you understand some of the areas that you might need improvement. One area where many lodging firms find a significant operating advantage is to sell gift cards for special occasions such as Christmas, birthday or wedding presents. That can positively effect your cash flow. This section details how MakeRez can help you track and account for these gift cards in a way that their financial information is integrated into the reports MakeRez creates in the appropriate way.

One of the challenges with tracking gift cards are you don't always know who the gift card is being purchased for. Even more, you don't know when they are going to be used. We recommend handling gift cards in the following fashion.

1. Create a new guest record to represent the gift card and put in it the contact information for the person buying the gift card. Save the purchasers information into the database by clicking of the "**Save Guest Information**" button.
2. Put any relevant information you have gotten about the person the gift card is for into the notes field, put the amount of the gift card into the deposit field on the "**Booking Info**" Tab and click on the **Giftcard** area on the "**Workflow Info**" tab. Again, save the guest information.
3. If you are using the Transaction part of MakeRez, enter the amount of the gift card in the payments area of the Transaction along with the type of payment (Credit card, debit card, ….) and a comment indicating this transaction is due to a gift card.

Make sure you write the guest number of the purchaser you just created on the gift card itself as the "**number**" of the gift card.

When the person who receives the gift card contacts you, ask them for the gift card number so you can easily connect it to the purchaser's record in MakeRez. Also ask them to bring the gift card with them when they arrive for their stay and give it back to you. If the gift card receiver wants to go ahead and make a reservation, bring up the purchasers guest record (their guest id is the same as the gift card number). Copy the relevant purchaser information into the notes field and replace the purchasers contact information with the receivers contact information. Write down the amount of the gift card (it should still be in the deposit field on the "**Booking Info**" tab. Fill out the **Booking Info** as normal and go ahead and make the reservation on the **Workflow Info** Tab. That process will take the deposit that is calculated using the rate table and over write the deposit information (gift card amount) on the "**Booking Info**" tab.

Finally, put the gift card amount back into the deposit field and save the guest information once again.

Appendix F – A Brief Intro To HTML Email

The following Html formatting tags are supported in MakeRez. If it encounters any others, they will be stripped out.

Structure Tags

- <html> tag indicates the start of an html email, must be the first characters in the file.
- </html> tag indicates the end of an html email, must be the last characters in the file.
- <body> tag indicates the start of the displayable email information. Must be immediately after the <html> tag.
- </body> tag indicates the end of the displayable email information. Must be immediately before the </html> tag.

Spacing Tags

- tags. They enclose sentences that should be set apart in a paragraph.
-
 tag. Indicates a line break.

Formatting Tags

- tags. They enclose words that should appear in bold. • tags. They enclose words that should appear in italics.
- <u></u> tags. They enclose words that should appear underlined.
- tags. They enclose words that can be "styled" by options in the opening tag. The format for the opening span tag is . There can be as many attribute:value pairs as you need. Supported attributes and values are:
    - The attribute of color with values taken from regular color names like red, blue, yellow, orange,…
    - The attribute of font-weight with values of normal, bold or bolder. ○ The attribute of font-size with values of xxpx where xx is the size in pixels of the font.

Example: Hi mom will produce the words Hi mom in bold, with a red color and the font size will be 12 pixels tall.

Link Tags

- <a> tags. They enclose information that allows the guest to "link" to a specific webpage directly from the email. The <a> tag has a much more complex format. In the following example if someone clicks within the words "RiverDance Availability" it will take them to **http://www.riverdancenc.com/availability/php** web page.

Example: RiverDance Availability

Image Tags

- <img> tags to allow you to embed images from your website in the body of the email.

Example:

Where the width of the image is 80% of the email, it is centered and the image is stored at http://www.MakeRez.com/sites/riverdancenc/emailTemplates/RiverDance.jpg.

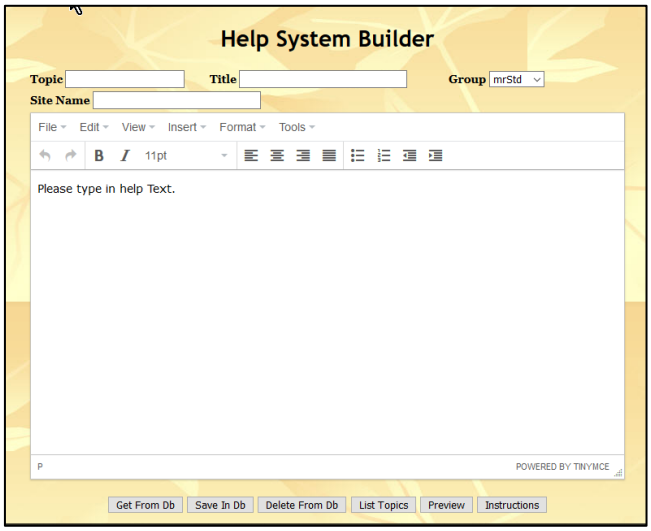
A Simple Html Email

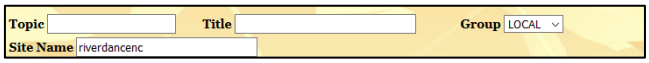
```
<html>
<body>
<p>
This is a bunch of sample text with a word in <b>BOLD</b> and a link to
<a href="http://www.riverdancenc.com/availability.php">RiverDance Availability</a>
If you want we can add in the following image
<img    src="http://www.MakeRez.com/sites/riverdancenc/emailTemplates/images/RiverDance.jpg"
style="display:block; margin: 0px auto; width: 80%;" />
that is already on the internet.
</p>
</body>
</html>
```

Will create the following email body.

Appendix G – How to Add Local Help

MakeRez uses a separate page to create the help files that it used. Typically that page is used by out developers to create information to help you understand how to use MakeRez.





To Create a New Topic- Enter the Topic and Title the topic you want to create in the fields above. Enter the text for the topic using the editing tools described below and then choose "Save in Db".

To select text – Position the mouse cursor at the beginning of the text you would like to select. Click and hold the left mouse button down and drag the mouse to select the text.

To type in new text – Position the mouse cursor and start typing.

To copy text – Select the text you want to copy. The use the keyboard and hold the ctrl key down and type c.

To paste text - Position the mouse cursor where you want the text to be pasted and hold the ctrl key down and type v.

To delete text – Select the text you want to delete, hold the ctrl key down and type x.

To print - Go to the File menu and choose print.

Get topic from Db – Enter the name of the topic in the Topic field and choose "Get From Db".

Save topic in Db – If this is an old topic you have just modified, choose "Save in Db".

Delete From Db – You must have already displayed the topic you want to delete. Then choose "Delete From Db".

List Topics – Choose "List Topics".

Preview – Choose “Preview”.

Instructions - Choose “Instructions”.

Editting Commands

	undo	undo the last edit	
	redo	redo the last undo operation	
B	bold	Bolds selected text	**test**
I	italic	Italicizes selected text	*text*
11pt	Set the size of the selected text		
	justify left	Aligns the selected text to the left	text
	justify center	Aligns the selected text to the center of the screen	text
	justify right	Aligns the selected text to the right	text
	justify full	Aligns the selected text to both left and right	text
	bulleted list	Creates a bulleted list	• item 1 • item 2 • item 3
	numbered list	Creates a numbered list	1. item 1 2. item 2 3. item 3
	decrease indent		
	increase indent		
	insert web image		
	insert link		
<>	show html code		