

**MakeRez**



**We Put Heads In Your Beds**

# MakeRez WorkBook

Reservations and Relationship Marketing For Vacation Rentals

**A Common Sense Approach**

**10/31/2018**

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## About MakeRez

**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.

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## 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 rationale 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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## 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 expectations”** 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 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.

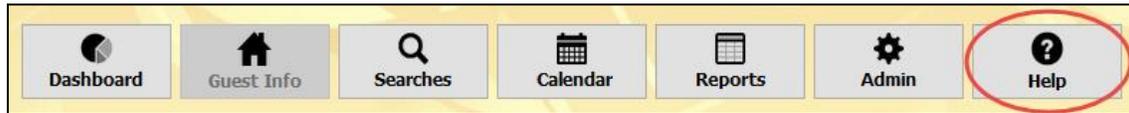
So do you want to stand out from the crowd? Dive in and see just how "**Relationship Marketing**" can be part of your answer.



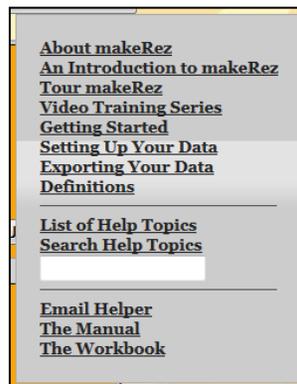
**Use Relationship Management  
To Stand Out from the Crowd**

## The Integrated Help System

Before you jump into this Demo Book, a key aide in understanding **MakeRez** is its integrated help system. To help you navigate its features and functions, all of the **MakeRez** pages give you access to an **Instructions** button. The help describes the functionality on each page and should assist you in getting the maximum value from using **MakeRez**. There is also a help pane available from the top level menu buttons that covers most of the important help topics.



### The Help Pane

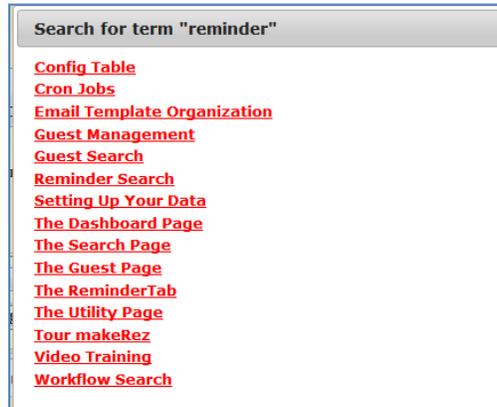


You can enter the help system either by working through the Help Pane above and selecting one of the topics like **"About MakeRez"** or by selecting the **"Instructions"** button that is present on most of the **MakeRez** pages. Once a help topic, like **"Tour MakeRez"** is selected, a help dialog like the one on the next page 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** like those in the fragment of help information below . 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.

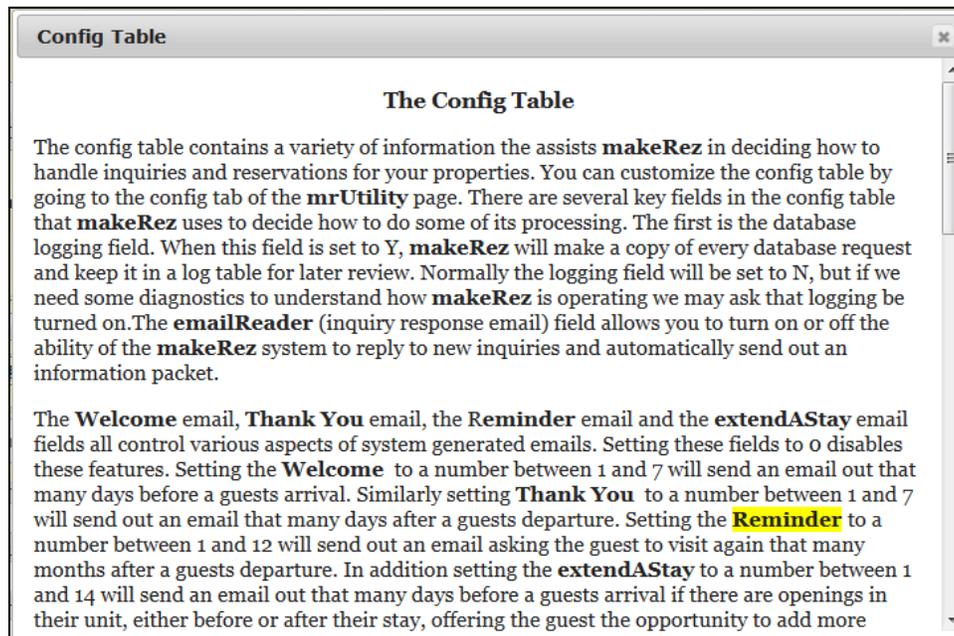
- **The Marketing Engine.** One of the main reason to use **makeRez** is its ability to help you market your property more effectively. It does this is two basic ways:
  - Making sure you have efficient and full communications with your guest and potential guests. Part of this is done using automatic **Cron jobs** that the system runs. 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. The question is do you see all of them? Do some go into your spam folder? What is the time lag from getting an inquiry to sending out a response? Its 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 the guests name, email,... and respond to the inquiry within minutes by sending out a marketing overview of your property. In addition **makeRez** will 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), .... 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, ....

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. There is a Search function, where by typing in a phrase or word in the box below it, and selecting **"Search Help Topics"**, the help system will

display any Help Topic that contains that word or phrase in its text. Say 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 contain the search topic will be displayed.



If you click on one of the topics in the list, say the **Config Table** topic, the help system will display that topic with all the occurrences of the string "reminder" highlighted in yellow. That part of the Config table help topic talks about how to setup Reminder emails.



You can take a video tour of the help system by [clicking here](#).

## The Guest Page

Before you go on to the exercises that focus on entering and using guest information within MakeRez, you should review the overall function of the guest page by taking the [video tour](#) of it. Please remember than guest number 1 should be the person who administers MakeRez for your properties.

### EXERCISE 1, A New Guest (Direct Reservation)

You just received a phone call from Kyle Davidson who has never stayed with you before. Kyle wants to make a new reservation. The information they gave you over the phone is:

**Name:** Kyle Davidson

**Email:** [kyle1234@gmail.com](mailto:kyle1234@gmail.com)

**Address:** 4321 Anderson Road, Asheville, NC 26703

**Phone:** (828) 555-1111

**Special Requests:** None

**Number of adults:** 2

**Number of children:** 0

**Date requested:** Jan 12, 2020

**Number of nights:** 6

**Cabin choice:** Any

No pets

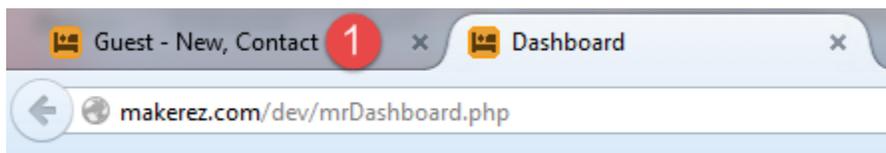
Reason for coming: Anniversary, How they found you: Google search, No special involved

Since the reservation is so far in advance, Kyle asks if you could take ½ your normal deposit up front and then charge them the rest in 3 months. You agree. While you are on the phone with him you take a quick peek at the calendar and verify those dates are available. Based on his request, you talk with Kyle about which cabin might be best and he decides on the Tree Tops.

If you are not already in the MakeRez application, please start it by logging in. That should take you directly to the Dashboard page. From there you should select the Guest page by selecting the Guest Info button at the top of the Dashboard page.



That should start the Guest page in another browser tab that will be titled “Guest – New, Contact”. If needed, click on that tab header to display the Guest page.



Once the Guest page is displayed, it's time to put in the information that Kyle Davidson has provided. The first tab that should be displayed is the one that shows the contact and demographic information.

The screenshot shows a web interface for managing guest information. At the top, there are fields for 'Guest Id' (set to 'new') and 'Confirmation Number'. Below that is a 'Guest Name' field containing 'Kyle Davidson' with a red circle '1' next to it, and a 'Search' button. A row of buttons includes 'Save Guest Information', 'New Guest', 'Duplicate', 'Get Guest', 'Delete Guest', and 'Instructions'. A yellow banner below the buttons reads: 'Click the mouse into a field you want to change. Make sure you save the Guest Information when you are done.' Below this is a tabbed interface with 'Contact Info' selected. The 'Contact Info' form has several fields: 'Initial Contact or Booking Date' (2015-11-03, red circle '5'), 'Email' (kyle1234@gmail.com, red circle '2'), 'Repeat Email' (kyle1234@gmail.com), 'Cell #' ((828) 555-1111), 'Alternate #' (Alternate #), 'Street' (432 Anderson Road), 'City' (Asheville), 'State' (North Carolina, red circle '3'), and 'zip' (26703). Below the form is a 'Notes and Actions' section with a text area containing: 'Since the reservation is more than 7 months away Kyle has asked that we take half of the deposit now and half of it in 3 months' (red circle '4'). A 'Save Notes' button is at the bottom of the notes section.

### Contact Info Tab

1. First his name should be entered. To be able to use the "Save Guest Information" button, you must at least enter in the guest name
2. And the guest email addresses. (Fields marked in red). Since email is the most important communications tool we have, we ask you enter the address twice to make sure it is correct.
3. Next you can fill in the fields marked in blue such as street and city. While blue fields are not required for an inquiry, they must be filled in before for a booking.
4. The notes field at the bottom of the contact information is used to indicate our agreement with Kyle to take his deposit in two pieces. If you allow pets, and Kyle was bringing one, you would also put that information into the Notes field.
5. Once all the Contact Info is filled in you should click on the **Booking Info** button.

When you are working with a new reservation, its best to check to see if that customer has stayed with you before. If so, you can type in a fragment of the guests name and click on the search button next to the name. That will look in the database for previous reservations for the guest and allow you to quickly transfer all their contact information.

## Within the Booking Info Tab

Guest Id 1744 and Confirmation Number

Guest Name Kyle Davidson Search

Save Guest Information New Guest Duplicate Get Guest 1744 Delete Guest Instructions

Click the mouse into a field you

Contact Info Booking Info

# Adults 2

# Kids 0

Booked N

Arrival Date 2020-01-12

# Nights 6

Property RiverDance

Unit Tree Tops

Total Rent \$ 460.00 Std Rate

Deposit 230.00

Cleaning Fee \$ 40.00

Extra Fee \$ 0

CC Fee 0.00

Source Google

Occasion Anniversary

Special

2020						
weekday	Tu	We	Th	Fr	Sa	Su
dates	01-12	01-13	01-14	01-15	01-16	01-17
rates	\$115.00	\$115.00	\$115.00	\$115.00	\$115.00	\$115.00

Total Rent is \$690

Deposit should be \$345

1. Since you have already checked on the calendar and verified that Jan 12, 2020 is open in Tree Tops for six nights, you can set the Arrival Date by using the popup calendar tool.
2. After putting in the number of nights as 6, set the number of adults and children to two and zero respectively. Use the Property drop down to first select the property group they are in interested in, in this case the RiverDance Farm. Finally use the Unit drop down to select the Tree Tops cabin. If you have a separate cleaning charge for that unit, it should be entered next.
3. By clicking on the “**Std Rate**” button, you can check what the rate would be for this guest based on the rate table calculations contained in MakeRez. Once the guest is actually booked you can use the “**Display Rates**” button in the **Workflow Tab** to adjust the rates if needed.
4. The Standard Rates popup will show a day by day picture of your standard rates for this guest in addition to the total rent and deposit if the standard rates are used. After you have viewed it click on the attached X to clear the popup.
5. After you have made all yours changes, make sure you click on the “**Save Guest Information**” button.
6. If you would like to continue on and make a booking, click the **Workflow Info** button.

## Within the Workflow Tab

Guest Id 1744 and Confirmation Number

Guest Name Kyle Davikson

Save Guest Information New Guest Duplicate Get Guest Delete Guest Instructions

Click the mouse into a field you want to change. Make sure you save the Guest Information when you are done.

Contact Info Booking Info Workflow Info Transactions Reminders Documents

Instructions Display Rates

Make Booking ?	<input type="checkbox"/>	First Charge?	<input type="checkbox"/>
Send Contract ?	<input type="checkbox"/>	Welcome Sent	<input type="checkbox"/>
Send Receipt	<input type="checkbox"/>	Thank You Sent	<input type="checkbox"/>
Waitlist	<input type="checkbox"/>	Redeemed Giftcard	<input type="checkbox"/>
No Room	<input checked="" type="checkbox"/>	Retired ?	<input checked="" type="checkbox"/>
Cancelled Reservation	<input type="checkbox"/>	Recontact ?	<input type="checkbox"/>

The text area below provides a place for you which will be substituted for the [[COMMENT

Guest Rates

Rates for guest # 1744

Over Ride

weekday	Tu	We	Th	Fr
dates	2016-01-12	2016-01-13	2016-01-14	2016-01-15
rates	115.00	115.00	115.00	115.00

Cancel

1. To create the booking and email the associated booking confirmation and contract, start by clicking on the "**Make Booking**" checkbox. It will ask you if you are sure you want to proceed and if you agree, the booking will be made and the booking confirmation will be sent. This confirmation contains no information on any of the charges related to the stay.
2. Click on the "**Display Rates**" button to display a popup of the current rental rates that are in the going to be charged to the guest.
3. If there is a need to "**adjust**" the rates, type in the desired changes and save them by clicking on the **Override** button.
4. Once the rates are correct, if you want to send a contract, you can select the "**Send Contract**" button which will make that happen.
5. When you are done making the booking, go ahead and use the guests credit card information to with your credit card service so the deposit gets sent to your bank account. Next you should go to the "**Transactions**" Tab to enter that information into the transaction record for your guest.

## Within the Transaction Tab

2 guest(s) staying for 4 night(s) with \$ 0.00 in other charges. Total rent \$460.00, plus cleaning of \$ 40.00, plus taxes of \$ 33.75. Total bill of \$533.75.

To save Transactions in the database when the Save Transactions button is hit.

To add the first transaction, edit the values and select Add

Guest Id	Trans. Id	Type	Date	Purchase	Payment	Last Four-Comments
1744	0	CC	2015-04-11		115.00	First half of deposit

The screenshot shows a software interface for managing transactions. At the top, a summary box displays stay details: "2 guest(s) staying for 4 night(s) with \$ 0.00 in other charges. Total rent \$460.00, plus cleaning of \$ 40.00, plus taxes of \$ 33.75. Total bill of \$533.75." Below this are two buttons: "Instructions" and "Save Transactions". A text box explains that transactions are saved when the "Save Transactions" button is hit. Another text box instructs the user to "add the first transaction, edit the values and select Add". Below this is a table with columns: Guest Id, Trans. Id, Type, Date, Purchase, Payment, and Last Four-Comments. A second table below shows a prototype transaction with values: Guest Id 1744, Trans. Id 0, Type CC, Date 2015-04-11, Amount 115.00, and Last Four-Comments First half of deposit. Red circles with numbers 1 and 2 highlight the "Add a Transaction" button and the "Last Four-Comments" field, respectively.

1. You should have already done the billing through your credit card authorizer before you enter in the transaction so you are sure all the information is correct. It's a good practice to enter the last four digits of the credit card in the comments area of the transaction. When you go to the Transaction Tab, there is a prototype of a new transaction displayed. The Guest Id and the Transaction Id have already been set and can't be changed (they are grayed out). To complete the transaction add in the date, amount, any pertinent comments and the type of transaction, in this case probably a credit card.
2. Once the transaction information has been entered into the prototype, click on the **"Add a Transaction"** button to move the new transaction to the list of current transactions.

## Still Within the Transactions Tab

Guest Id 1744 and Confirmation Number

Guest Name Kyle Davidson

Save Guest Information New Guest Duplicate Get Guest Delete Guest Instructions

Clear Group Group Reservations

Group Res Instructions Unit Count 1 Create Group Reservation

Click the mouse into a field you want to change. Make sure you save the Guest Information when you are done.

Contact Info Booking Info Workflow Info Transactions Reminders Documents

2 guest(s) staying for 4 night(s) with \$ 0.00 in other charges. Total rent \$460.00, plus cleaning of \$ 40.00, plus taxes of \$ 33.75. Total bill of \$533.75.

Instructions Save Transactions

To save Transactions in the database when the Save Transactions button is hit.

To update a transaction, click anywhere in it.

Guest Id	Trans. Id	Type	Date	Purchase	Payment	Last Four-Comments
1744	0	CC	2015-04-11		\$115.00	First half of deposit
Summary				\$ 0.00	\$115.00	Balance \$-115.00

1. After the new transaction is staged to the transaction list, we have a display like the following that lists our new transaction.
2. In addition a numerical summary of all the transactions is included in the display.
3. Finally to put the new transaction into the database, click on the **“Save Transactions”** button.
4. Since we had agreed to take half the deposit at the time of the booking, this transaction only represents that half of the deposit. In three months we need to collect the second half of the deposit. Within MakeRez we should go to the **Reminders Tab** to do that.

## Within The Reminders Tab

Reminders Table

Instructions Save Reminders

To add the first reminder, edit the values and select Add

is past due, is due within 7 days

Index	State	Entry Date	Due Date	Guest Id	Property or Unit	Description	Comments
0	P	2015-04-11	2015-07-11	1744		2nd half of deposit	\$115

Add a Reminder Delete this Reminder Update this Reminder

1. When the reminder tab is displayed, it has a prototype of a reminder entry already created. The reminder index (used by the database), the reminder state (P for pending) and the reminder entry date (today's date) have already been set for you. Enter the appropriate due date in three months so the reminder system will tap you on the shoulder to get the 2<sup>nd</sup> payment.
2. Between the Description and the Comments enter in the specifics of the reminder.
3. Finally, save this reminder to the database by selecting **“Add a Reminder”** and then selecting **“Save Reminders”**.

Once you have completed this exercise; please take a look at the Dashboard page. In it you will see that a new reservation for Kyle Davidson has been made. The reminder you just entered will not yet show up in the reminder section of the page, since that just focuses on reminders that are overdue and on reminders that are due to be completed in the next week. If the reminder is still pending on Jan 4, 2020 it will appear in the Dashboard page.

To see a little more about reminders, watch this [video clip](#).

## EXERCISE 2, A Returning Guest

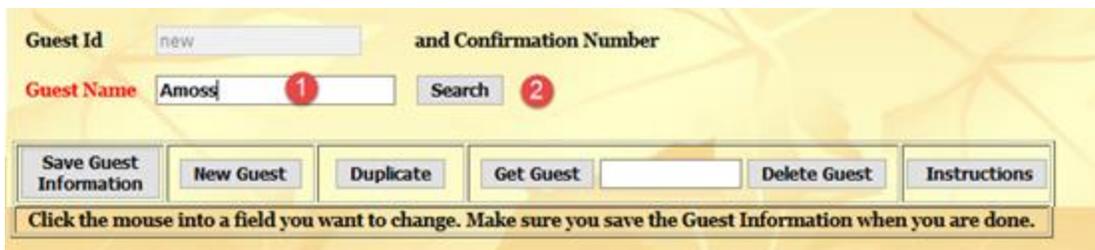
Several days later, John Amoss, a guest who has been with you before, wants to make a new reservation for Thursday March 10th 2020 for three days and to take advantage of your midweek special that offers the third night at half price. Other than the new dates, everything else is the same in their reservation. You will be using a procedure to “**duplicate**” John’s previous reservation and then make the needed changes. That same procedure for duplicating a guest can be used to reserve additional cabins for the guest without having to type in all the information again. Within MakeRez, a single party reserving multiple units means multiple reservations.

### On the Top Level Menu.



1. Click on the Guest Info button

### On the Guest Page.



1. When the Guest Page loads you will see an area where you can enter the Guest Name. Since you know John stayed with you previously, you can just enter a fragment of his name, in this case Amoss (capitalization doesn't matter).
2. To look for information about John's previous reservations, select the "**Search**" button. That will bring up the following dialog box.



1. The dialog box provides some of the details of Johns previous reservation. If we hover the mouse over his name, the background of the row of the table runs white, and if you click into that row, that reservation for John will be retrieved. If there are multiple hits for the word Amoss, simply select the appropriate one from the table.
2. When you are done with the dialog box, you can cancel it by selecting the X in the upper right hand corner.



1. Finally click on the “Duplicate” button to create another guest record with all the same information except for the things pertinent to the new reservation (Arrival Date, number of nights, ...). Make sure you have verified with John that his contact information is still correct.

Guest Id **new** 1 and Confirmation Number

Guest Name: John Amoss  Search

Save Guest Information | New Guest | Duplicate | Get Guest 282 | Delete Guest | Instructions

Click the mouse into a field you want to change. Make sure you save the Guest Information when you are done.

Contact Info | Booking Info | Workflow Info | Transactions | Reminders | Documents

Initial Contact or Booking Date: 2016-01-02

Email:

Repeat Email:

Cell #:

Alternate #:

Street: 191 Main ct v

City: Vincennes

State: Indiana

zip: 47591

Notes and Actions

1/2/2016, 4:04:48 PM: Duplicated from guest id 282 1 2

Save Notes

1. Once the information is duplicated, you will see new appearing in the Guest Id field which indicates this new record has not yet been saved into the database.
2. In addition, in the Notes field you will see an action indicating that this reservation was actually created by duplicating guest id 282 (John Amoss's previous reservation)

Once you have verified the contact information in the previous reservation is correct, you can move on to the Booking Info Tab.

### On the Booking Info Tab

Guest Id  and Confirmation Number

Guest Name

Save Guest Information

Click the mouse into a field you want to change. Make sure you save the Guest Information when you are done.

Contact Info **Booking Info** Workflow Info Transactions Reminders Documents

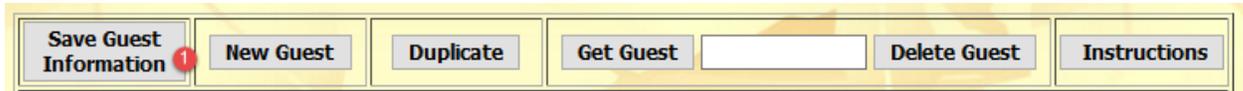
# Adults	<input type="text" value="2"/>
# Kids	<input type="text" value="0"/>
Booked	<input type="text" value="Y"/>
Arrival Date	<input type="text" value="2020-03-10"/> <input type="button" value="🗓️"/> <input type="button" value="❗"/>
# Nights	<input type="text" value="3"/>
Property	<input type="text" value="RiverDance"/>
Unit	<input type="text" value="River Rocks"/> <input type="button" value="❗"/>
Total Rent \$	<input type="text"/> <input type="button" value="Std Rate"/> <input type="button" value="❗"/>
Deposit	<input type="text"/>
Cleaning Fee \$	<input type="text" value="40.00"/>
Extra Fee \$	<input type="text" value="0"/>
CC Fee	<input type="text" value="0.00"/>
Source	<input type="text" value="return"/>
Occasion	<input type="text" value="Wedding"/>
Special	<input type="text" value="Off Season"/>

1. Change the arrival date and the number of nights to the new values.
2. Since John wanted to try the River Rocks Cabin, indicate that as the choice.
3. To check on what the standard rates would be for this stay, click on the "**Std Rates**" button.

The following dialog box will be posted containing the standard rates.

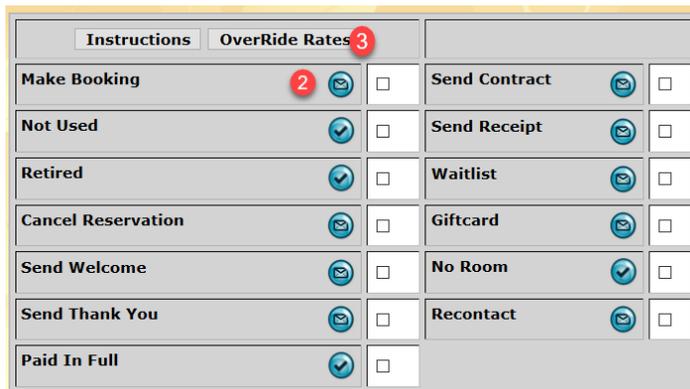


1. Click the X in the upper corner to cancel the dialog box.



1. When all the changes have been made within the booking tab and the contact info tab (if any), select the "Save Guest Information" button.
2. Note that the new reservation has been given a Guest Id number. Within MakeRez the Guest Id and the confirmation number for a reservation are used interchangeably.

### On the Workflow Info tab



3. Make the booking for John by clicking on the "Make Booking" checkbox.
4. Since John is taking advantage of the mid weeks special, you need to alter the Standard Rates, click on the "Override Rates" button.

Rates for guest # 282			
<b>Over Ride</b> <span style="color: red; font-weight: bold; font-size: 24px;">5</span>			
weekday	Th	Fr	Sa
dates	2020-03-10	2020-03-11	2020-03-12
rates	115.00	115.00	57.50 <span style="color: red; font-weight: bold; font-size: 24px;">4</span>

**Guest Rates**

1. Change the rate on the last day of John’s stay to ½ price, \$57.50, to reflect the mid-week special.
2. Click on the “**Override**” button to save that change to the database.

**Go back to the Booking Info tab**

1. Note that the right Total Rent charge is displayed.

<b>Arrival Date</b>	2020-03-22
<b># Nights</b>	3
<b>Property</b>	RiverDance
<b>Unit</b>	River Rocks
<b>Total Rent \$</b>	287.5 <span style="color: red; font-weight: bold; font-size: 24px;">1</span> <b>Std Rate</b>
<b>Cleaning Fee \$</b>	40.00
<b>Extra Fee \$</b>	0

You are done! To see more about handling a returning guest, please [watch the video](#).

### EXERCISE 3, Extending a Stay

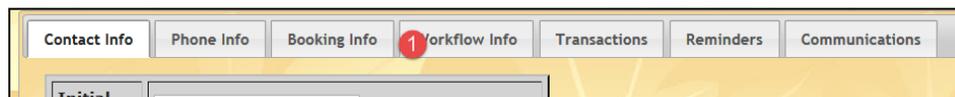
Some time goes by and Kyle Davidson, who made a reservation a while ago, has just sent you an email asking you to add a few days to the reservation. Kyle reminds you that his confirmation number for that reservation was 1744. You take a quick **peek at the calendar** and see that those dates are available.

**NOTE:** Within MakeRez, we will also refer to an “**extendAStay**” email. That email is sent to guests, if there is an opening in the cabin they have chosen immediately before or after their stay. The **extendAStay** email is sent approximately 10 days before they arrive. That email invites a guest to add days to their stay, either before or after, and is the perfect place for a special offer to entice them.

#### On the Guest Page.

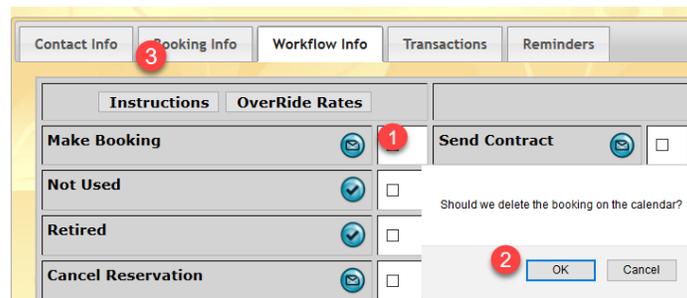


1. Go to the guest page and enter 1744 in the field next to the “**Get Guest**” button.
2. Click on the “**Get Guest**” button to bring up Kyle Davidson’s information.



1. Once the guest page is displayed, click the “**Workflow Info**” Tab.

#### On The Workflow Tab



1. In the Workflow Info Tab, the “**Make Booking**” checkbox should be checked, indicating there is a current reservation for Kyle Davidson. Click on that checkbox to take the reservation off the books.
2. You will have to click “**OK**” when the dialog box appears to tell MakeRez to go ahead and cancel the reservation.
3. Finally go back to the “**Booking Info**” Tab to make the actual changes.

## On The Booking Tab

Contact Info	Phone Info	Booking Info	Workflow Info	Transactions	Reminders	Communications
# Adults		2				
# Kids		0				
Pets		N				
Arrival Time		hh:mm				
Arrival Date		2020-01-12				
# Nights		4				
Property		RiverDance				

1. In the “**Booking Info**” Tab, change the number of nights to the new request.
2. Next you make sure you save this change to the database by clicking on “**Save Guest Information**”.
3. Finally, go back to the “**Workflow Info**” Tab to rebook the reservation with the extended number of nights.

## Finally Back On The Workflow Tab Again

Instructions	OverRide Rates		
Make Booking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Send Contract
Not Used	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Send Receipt
Retired	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Waitlist
Cancel Reservation	<input type="checkbox"/>	<input type="checkbox"/>	Giftcard

1. Your last step is to click on the “**Make Booking**” checkbox and to click “**OK**” in the dialog box when MakeRez asks you if it's OK to make the reservation.

To see more about extending a stay, please [watch the video](#).

## EXERCISE 4, A Website Reservation:

Kelly Clark goes up to your website and after looking at your reviews, pictures, videos, ... feels this is just the place she wants to spend her honeymoon. So she makes a reservation through your website. Select this link to start the process.

### On the Calendar Page embedded on your website

**Our Calendar**

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

<b>Guest Name</b>	<input type="text" value="Your Name"/>	<b>Arrival Date</b>	<input type="text"/>
<b>Unit</b>	<input type="text" value="---Please choose---"/>	<b># Nights</b>	<input type="text" value="1"/>
<b># Adults</b>	<input type="text" value="1"/>	<b># Kids</b>	<input type="text" value="0"/>

Use the < button to move back one month and the > button to move one month forward. Similarly the << button and the >> button move the calendar one year backward and forward. The month dropdown can quickly move you to another month in the current year. Dates with X's in them and are highlighted in orange are currently occupied while dates that don't have X's are currently unoccupied.

First select an unoccupied checkbox that matches your desired arrival date. In this case September 10th 2018. That box turns blue to indicate you have selected it.

You selected 2016-01-24 in Tree Tops  
 Kids: Allowed, Pets: Allowed  
 Max Occupancy: 8  
 First night base rate for two adults is \$115

Enter the Tree Tops Suite (upper level) via the heavy timber stairs. There you will find two spacious bedrooms, a full bath and a sitting area with a comfy leather couch and TV/DVD combo. The bookcase in the sitting room is stocked with good books to read and a selection of DVDs to enjoy. It also has a small microwave and refrigerator for your enjoyment. If you need more refrigerator space we will be happy to clear out a section of the kitchen refrigerator for your use. The sitting room has an overlook into the great room with a privacy screen.

A popup is displayed like the one above that verifies what your selection is and some of the specifics (like the capacity of the cabin, whether kids are allowed, ...) along with the base rate for the first night to help a prospective guest judge the difference between units. Clicking on the unit names displays the same information.

Click the **X** to dismiss the popup and proceed. You can always make a different cabin and date selection before moving on.

The screenshot shows a reservation form titled "Fields marked in RED are required". At the top, there is a dropdown menu for "I want to make a(n)" with "Reservation" selected. Below this are several input fields, some of which are highlighted in red to indicate they are required: "Guest Name", "Email", "Repeat Email", "Street", "City", "State", "Zip", "Cell #", "Alternate #", "Unit", "Arrival Date", "# Nights", "# Adults", and "# Kids". The "Arrival Date" field is pre-filled with "2016-01-24". Below the form, there is a checkbox for "I have read the rental agreement and agree to comply with all rental policies." and a text area for "Your Comments". At the bottom, there are "Check Rates" and "Submit" buttons.

Select whether you want to make a reservation or just simply make an inquiry. Depending on what you have chosen, the fields labeled in Red are required.

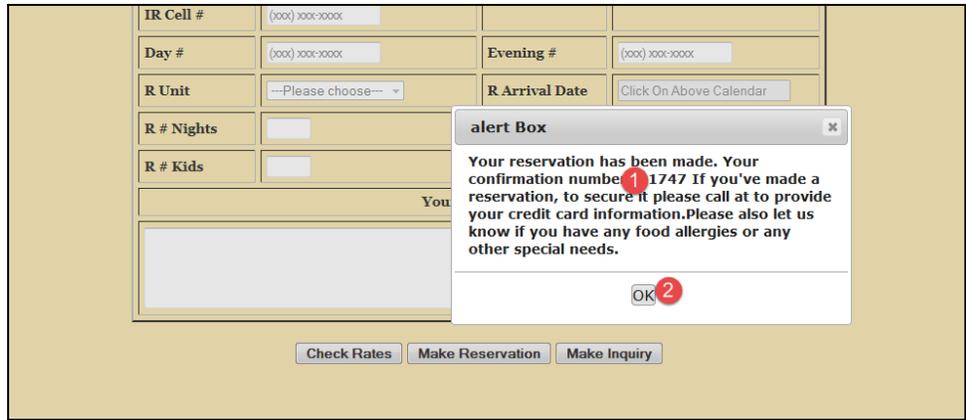
Once you have filled out the information, click **“Check Rates”** so see what the Standard rates and deposit would be for your stay.

The screenshot shows a "Standard Rates" popup window. It contains a table with the following data:

2016			
weekday	Su	Mo	Tu
dates	01-24	01-25	01-26
rates	\$115.00	\$115.00	\$115.00

Below the table, it states: "Total Rent is \$345" and "Deposit should be \$172.5". At the bottom of the popup, there is a "Standard Rates" button and an "Arrival Date" field with the value "2016-01-24".

The Rates popup is displayed and you can see what the standard rate structure is for this cabin. The final rate may vary if the guest is taking advantage of a special, or other special rate. At this point if the prospective guest wants to proceed they can click on the **“Submit”** button.



1. Once the reservation or inquiry is made, a popup is display with your confirmation number. Please copy down that confirmation number,
2. click on "OK" and you are done.

To see more about making a website reservation or inquiry, please [watch the video](#).

## EXERCISE 5, Cancel a Reservation

Oh no, a guest, who had previously made a reservation, decides to cancel.

First, bring up the guest page. If you know their confirmation number you can enter it into the “**Get Guest**” field and hit enter. If you don’t know the number, you can type in a fragment of their name in the search box that you used in exercise 6. Once the guest information has loaded, go to the Workflow Tab.

### Within the Workflow Tab

Instructions		OverRide Rates			
Make Booking	1	<input checked="" type="checkbox"/>		Send Contract	<input type="checkbox"/>
Not Used		<input checked="" type="checkbox"/>		Send Receipt	<input type="checkbox"/>
Retired		<input checked="" type="checkbox"/>		Waitlist	<input type="checkbox"/>
Cancel Reservation	2	<input type="checkbox"/>		Giftcard	<input type="checkbox"/>
Send Welcome		<input type="checkbox"/>		No Room	<input checked="" type="checkbox"/>
Send Thank You		<input type="checkbox"/>		Recontact	<input type="checkbox"/>
Paid In Full		<input checked="" type="checkbox"/>			

1. There the “Make Booking” checkbox will be checked. Click on it again to remove the checkmark. You will be asked if you want to delete the booking. Answer Yes.
2. You want to keep track of what has happened with guests. Also, you might want to create a special marketing campaign for people who have been interested enough in your property to make a reservation, but for whatever reason they have had to cancel. For both those reasons add this guest to the “Cancelled Reservation” list by clicking the checkbox.
3. You will then be asked if you want to send out marketing (extend A Stay) emails to reservations on either side of the one that was just cancelled, and to folks on the wait list interested in nearby times.

To mount a marketing campaign for guests who have previously cancelled, you first have to use the fact that they are on your "cancelled" list. You can search and find guests who have previously cancelled in the following way.

### Within the Search Page

The screenshot shows the 'Workflow Search' interface. At the top, there are three tabs: 'Guest Search', 'Workflow Search' (highlighted with a red circle 1), and 'Reminder Search'. Below the tabs, there is a 'Which Property?' dropdown menu set to 'RiverDance' (highlighted with a red circle 2) and an 'Instructions' link. The main area is a 'Search Parameters' form with various checkboxes and input fields. The 'Cancelled Reservation Y/N' checkbox is checked (highlighted with a red circle 3), and the input field next to it contains 'Y' (highlighted with a red circle 4). Other parameters include 'Make Booking? Y/N', 'In Group? Y/N', 'Retired? Y/N', 'Welcome Sent Y/N', 'Thank You Sent Y/N', 'Wedding? Y/N', 'Arrival Lo Hi' (2015-01-01), 'Arrival To Hi' (2016-01-01), and 'Contact Lo Hi'. At the bottom of the form, there is a 'Send Custom EMail' dropdown menu (highlighted with a red circle 7) and an 'Export to CSV' button. Below the form is a table of search results (highlighted with a red circle 6).

Id	Name	Arrival	State	Cell #	Email	Adults	Kids	Booked	Prop.	Contact Date	Nights
1440	Rickey Roberts	2015-02-20	NC	828-656-5080		6	0	N	rr	2015-01-02	3
1462	Samuel Myers	2015-02-28	TN	(931)409-1716		2	0	N	tt	2015-01-21	1
1469	Ann Moeller	2015-03-13	TN	423-620-3550		2	0	N	rr	2015-01-28	2

1. First select the "Workflow Search" Tab.
2. Next set the Property selection box to the property group of interest (in this case RiverDance).
3. Click on the checkbox before "Cancelled Reservation" to indicate it should be part of the search criteria.
4. Type in Y in the box after "Cancelled Reservation" to indicate we are searching for cancelled reservations. You can also narrow the search, in this example the search was restricted to cancelled guests who were scheduled to arrive during 2015.
5. To initiate the search, click on "Search for Guests".
6. Rickey Roberts, among others, is one of the records that match the "cancelled guests" criteria.
7. At this point you could simply choose the "Export to CSV" button to create a spreadsheet that could be imported into the tool, like MailChimp or Constant Contact, that you use to do email campaigns. MakeRez also contains a way to send custom emails to your mailing lists, and selecting the dropdown box after the "Send Custom EMail" label will start that process. There is more detail on the custom email process in the **MakeRez Guide**.

To see more on cancelling a reservation, please [watch the video](#).

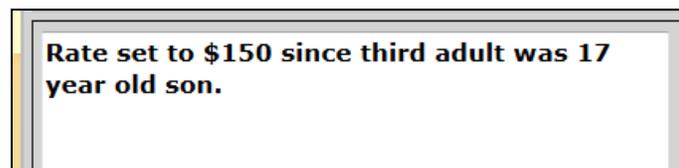
## VIDEO EXERCISE 6, The Wait List

Kyle Wellendorf has requested a reservation for Nov 11, 2014 for 4 nights and you have no cabins available for that timeframe. You've talked to him about alternatives, but they have asked to be put on the wait list. To see more about putting someone the wait list, please [watch the video](#).

## EXERCISE 7, Guest Notes and Actions

The guest notes area can be used for a number of purposes such as noting special arrangement you have made for this particular guest, to simply entering in relevant information that doesn't fit well any place else such as food allergies,... When a guest record is duplicated from an earlier reservation, the contents of the Notes field are also duplicated.

On the Search page, one of the things you can search for is a specific word or phrase that appears in the Guest Notes. For example, the Guest Notes for John Amos, guest number 282, are this:



Rate set to \$150 since third adult was 17 year old son.

If later we want to find John's guest record and we remember the note about his son.

1. First, go the Searches page
2. Then, the default Tab that appears is the Guest Search Tab
3. Click on the checkbox to the left of the "Notes contains" label.
4. And put the word son in the field to the right.
5. Make sure the right property group is selected in the drop down.



Which Property ? RiverDance - Instructions

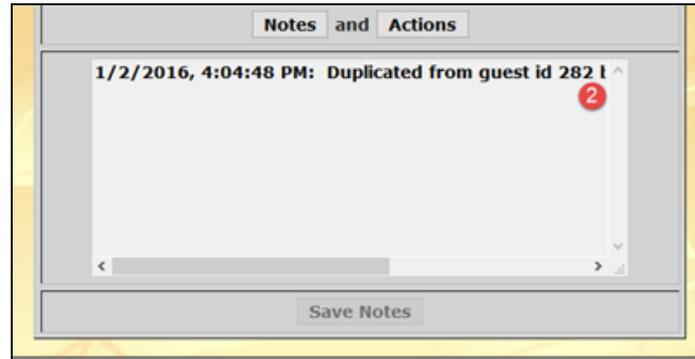
Search Parameters	
<input type="checkbox"/>	Name contains
<input type="checkbox"/>	Cell contains
<input type="checkbox"/>	Email contains
<input checked="" type="checkbox"/>	Notes contains

son

Finally, click on the "Search for Guests" button and John's results should appear with perhaps others in the search list. Click on his results and you can go to his detailed information.

On the other hand, **Guest Actions**, are information the system logs about changes to the guest record itself such as changes to the Contact, Booking or Workflow information. The date/time of the change, what the change was and who made the change are all noted. Following is an example of the action is noted when a guest record is duplicated from a previous reservation.

The **Notes** and **Actions** button toggle back and forth between the two items. The "**Save Notes**" button is only active when Notes are being displayed, and perhaps being added to.



To see more on using Guest Notes, please [watch the video](#).

## Collaboration

Running a lodging business often requires you to work with a number of different pieces of software from marketing resources like the HomeAway family, FlipKey and airbnb to back end accounting services like QuickBooks. Unfortunately, some folks try to trap you into a “**walled garden**” that forces you to use more and more of their features. These often come at a substantial additional expense and often limits your ability to use “**best in class**” solutions. MakeRez tries to offer a different approach by collaborating, either directly or indirectly, with other software platforms.

Here are several of the ways MakeRez can indirectly collaborate.

1. Export guest email addresses and names to a spreadsheet to use in email marketing campaigns.
2. Export transactions on a monthly basis to be imported into a variety of accounting software packages like QuickBooks.
3. Export customer data into a spreadsheet for more directly manipulate with spreadsheet tools.
4. Help evaluate the effectiveness of various marketing services, special offers and reasons that guests are visiting you to more precisely focus your marketing efforts.

MakeRez more directly collaborates in the following ways.

1. Help to manage the calendar complexity that working with multiple marketing services often causes. The MakeRez calendar has a "no vacancy" feature and this data is exported in a way that most of your marketing services can import( HomeAway family, FlipKey and airbnb). No more updating multiple calendars!!!
2. Enables inquiry requests to be automatically processed and responded to in a matter of minutes giving you the opportunity to get your story in front of a prospective guest before others.

MakeRez serves as the central place to store reservation and other information. That can be used by allowing a number of other advertising services to import the MakeRez calendar.

## EXERCISE 8, Looking at the Dashboard

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 a 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:

The dashboard is divided into four main sections:

- Quick Help Links:** Contains links for 'About makeRez', 'Getting Started with makeRez', 'The Internet Booking Engine', 'Index of Topics', 'Look at the Manual', and 'Look at the Workbook'.
- Help On Pages:** Contains links for 'Learn about entering Guest Information', 'Searching For Guests', 'How to Use the Calendar', 'Using Marketing Reports', and 'Setting Up/Maintaining Your Data with Admin'.
- Reminders:** Displays 'There are 7 overdue reminder(s) and 0 reminder(s) due in the next 7 days' and includes links for 'Learn About Reminders' and 'Details'.
- Backup Status:** Shows 'Last user database backup at 2015-08-01' and 'Last user email backup at 2015-08-01'. It includes links for 'Learn About', 'Db Backups', 'Email Backups', and 'Go To DB Backups' and 'Email Backups'.

1. Quick links to important help topics that will aid 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					
	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					
	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						

- 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 that 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 Deposits						
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
<input type="text"/> 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
<input type="checkbox"/>	daves 2nd task	really really really

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.

To learn more about using the Dashboard page, please [watch the video](#).

### EXERCISE 9, Transactions

Haley Cruthers, guest number 1539, stayed with you recently for three nights. Let's explore what is kept in the transactions area for her. Also, you should look at both the Revenue Detail report and Transactions Detail report to see what tools MakeRez has to better understand guest transactions.

#### Within the Guest page, Contact Info Tab

Guest Id  and Confirmation Number

Guest Name  2

Save Guest Information | New Guest | Duplicate | Get Guest  1 | Delete Guest | Instructions

Clear Group | Group Reservations

Group Res Instructions | Unit Count  | Create Group Reservation

Click the mouse into a field you want to change. Make sure you save the Guest Information when you are done.

Contact Info | Booking Info | Workflow Info | Transactions 3 | Reminders | Documents

Initial Contact Booking Date	<input type="text" value="2015-03-05"/>
Email	<input type="text" value="haley@gmail.com"/>
Repeat Email	<input type="text" value="haley@gmail.com"/>
Cell #	<input type="text" value="828 555-1111"/>
Alternate #	<input type="text" value="Alternate #"/>
Street	<input type="text" value="278 Allen Lane"/>

1. First put 1539 into the field after the "Get Guest" button and click "Get Guest".
2. That will bring up Haley's guest record.
3. Select the Transactions tab to see Haley's charges and payments

2 guest(s) staying for 3 night(s) with \$ 0.00 in other charges. Total rent \$345.00, plus cleaning of \$ 40.00, plus taxes of \$ 25.99. Total bill of \$410.99.

Instructions | Save Transactions

To save Transactions in the database when the Save Transactions button is hit.

To update a transaction, click anywhere in it.

Guest Id	Trans. Id	Type	Date	Purchase	Payment	Last Four-Comments
1539	167 <span style="color: red;">1</span>	CC	2015-03-06		\$172.50	0276
1539	358 <span style="color: red;">2</span>	Rent	2015-04-10	\$115.00		nightly rent
1539	373 <span style="color: red;">2</span>	Rent	2015-04-11	\$115.00		nightly rent
1539	377 <span style="color: red;">2</span>	Rent	2015-04-12	\$115.00		nightly rent
1539	378 <span style="color: red;">3</span>	Clean	2015-04-12	\$40.00		cleaning
<span style="color: red;">4</span> 1539	379 <span style="color: red;">3</span>	Tax	2015-04-12	\$25.99		taxes
Summary				\$410.99	\$172.50	Balance \$238.49

6 Add a Transaction | Delete this Transaction | Update this Transaction

Guest Id	Trans. Id	Type	Date	Amount	Last Four-Comments
<span style="color: red;">5</span> 1539	-379	Tax	2015-04-12	25.99	taxes

1. On the Transactions Tab, the transactions are displayed in order, first by date and then by Transaction Id. When the transactions are complete you will generally see a display much like the one below. The first transaction was entered manually into MakeRez and should represent the initial deposit that was taken with a credit card on March 6, 2015 for \$172.50.
2. The nightly rent transactions were created automatically by MakeRez during its nightly maintenance run.

- The cleaning and the taxes are added into the transaction during the last night of a guests stay automatically by MakeRez during its nightly maintenance run.
- After the last credit card authorization has been completed, click on any of the existing transactions to
- create a prototype that will be used to create the final credit card transaction.
- Once you have entered in the specifics of the final transactions, Payment of \$238.49,... click on the **“Add Transaction”** button to add it to the Transaction list.

2 guest(s) staying for 3 night(s) with \$ 0.00 in other charges. Total rent \$345.00, plus cleaning of \$ 40.00, plus taxes of \$ 25.99. Total bill of \$410.99.

Instructions Save Transactions 3

To save Transactions in the database when the Save Transactions button is hit.

To update a transaction, click anywhere in it.

Guest Id	Trans. Id	Type	Date	Purchase	Payment	Last Four-Comments
1539	167	CC	2015-03-06		\$172.50	0276
1539	358	Rent	2015-04-10	\$115.00		nightly rent
1539	373	Rent	2015-04-11	\$115.00		nightly rent
1539	377	Rent	2015-04-12	\$115.00		nightly rent
1539	378	Clean	2015-04-12	\$40.00		cleaning
1539	379	Tax	2015-04-12	\$25.99		taxes
1539	0	CC	2015-04-14		\$238.49	0276 <span style="color: red;">1</span>
Summary				\$410.99	\$410.99	Balance \$ 0.00 <span style="color: red;">2</span>

- That new transaction is added to the list and has a Transaction Id of 0 that indicates it is new.
- Adding that transaction should end up zeroing out the balance.
- Once the final transaction has been added, click **“Save Transactions”** to save the changes.

## EXERCISE 10, Receipts

Haley, is at the end of her stay, and has asked for a receipt. As mentioned earlier, the actual credit card authorization should have been done to insure the credit card number you have is valid. And the final transaction should be entered as above.

### Within the Guest Page in the Workflow Tab

Instructions		Display Rates	
Make Booking ?	<input checked="" type="checkbox"/>	Send Contract ?	<input checked="" type="checkbox"/>
In Group?	<input checked="" type="checkbox"/>	Send Receipt	<input type="checkbox"/>
Retired ?	<input checked="" type="checkbox"/>	Waitlist	<input type="checkbox"/>
Cancelled Reservation	<input type="checkbox"/>	Giftcard	<input type="checkbox"/>
Welcome Sent	<input checked="" type="checkbox"/>	No Room	<input checked="" type="checkbox"/>
Thank You Sent	<input type="checkbox"/>	Recontact ?	<input type="checkbox"/>
Wedding ?	<input checked="" type="checkbox"/>		

1. Simply click on the "Send Receipt" checkbox to send the receipt via email to Haley.

Transaction Detail				
Type	Date	Purchase	Payment	Comments
CC	2015-03-06		\$172.50	0276
Rent	2015-04-10	\$115.00		nightly rent
Rent	2015-04-11	\$115.00		nightly rent
Rent	2015-04-12	\$115.00		nightly rent
Clean	2015-04-12	\$40.00		cleaning
Tax	2015-04-12	\$25.99		taxes
CC	2015-04-16		\$238.49	0276
<b>Transaction summary</b>		<b>\$410.99</b>	<b>\$410.99</b>	<b>Balance \$0.00</b>

Above is an excerpt from the receipt email that was sent to Haley providing a copy of all the financial transactions that happened because of Haley's stay. You could also go to the Transaction tab for the guest and simply print out that tab.

## EXERCISE 11, Calendars

The calendar function in MakeRez is one of the central elements that you will continually come back to. It actually has a number of different faces that it presents, depending on what type of user is looking at the calendar, each displaying the type information that is pertinent to that user. Below is a calendar that is used for the folks that actually manage the properties.

Select the properties to view. All <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">3</span> <span style="float: right;">Instructions</span>																															
Created Fri Apr 10 2015 <span style="float: right;">4</span>																															
<span style="float: left;">&lt;&lt; &lt;</span> <span style="margin-left: 100px;">Apr</span> <span style="margin-left: 100px;">2015</span> <span style="float: right;">&gt; &gt;&gt;</span> <span style="float: right; margin-right: 20px;">Get Guests</span> <span style="float: right;">X--&gt;turnover</span>																															
	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	M	T	W	T	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	
<a href="#">Tree Tops</a> <span style="float: left;">7</span>	5	5	5	5	5	2	2	2	2	3	3				4	4	4							2	2				2		17 nights booked
<a href="#">River Rocks</a>	2		2	2	2	2	2			2	2	2			4	4	4	2	2	2				2	4	2			2		19 nights booked
<a href="#">Master</a>									2	2	2																				3 nights booked
<a href="#">Cottage</a>																															0 nights booked

**MakeRez Internal Calendar**

In this calendar there are three cabins in the RiverDance Farm represented for the month of April 2015. The last property, Cottage, represents a standalone vacation rental that is just open in the summer months. The Red circle denotes interesting information on the display that indicates:

1. The numbers underneath each of the days of the month represent the number of people in each unit under. The days that have no numbers in them are currently available.
2. This area is used to move the calendar to focus on other months and years. You click the << button to go back one year, click on the >> button to go forward one year. The < and > buttons move the calendar back and forth one month respectively, while the month dropdown lets you quickly select any month you want during the year.
3. The selection box at the top allows you to select all your property groups (in this case RiverDance and its three cabins and the stand alone vacation rental Cottage). You can also select any specific property group to view individually.
4. The **Get Guests** button allows a display of guest information for the guests that are coming to your property this month. In addition if you click on the day number, say Monday the 20th above, then a similar list of guest information for the next week will be displayed.
5. The days with the orange background represent turnover days where the unit must be prepped for the next set of guests.
6. At the end of each row is a summary of the number of nights that are rented for each unit.
7. On the left are the names of the properties that are being managed. Those names can be clicked on and makerez will display a picture of the unit, information about the number of folks who can stay there, whether children or pets are allowed in addition to a description of the unit itself.

One of the key features of MakeRez is its ability to take both inquiries and bookings over the internet in real time. The calendar interface for that process is simpler and only provides the availability information that the prospective guest needs to see. There are three specific types of guest calendars available:

- A desktop version for desktops, laptops and tablets
- And a mobile version for use on cell phones.
- A hidden version where the guest never actually sees your calendar, but is allowed to search a specific range of days for units that are available.

	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	M	T	W	T	F
	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
<b>Tree Tops</b>	X	X	X	X	X				X	X	X	X				X	X	X					X								X
<b>River Rocks</b>	X	X	X	X	X		X	X	X	X					X	X	X		X	X	X		X	X							

**Desktop Calendar**

**Mobile Calendar**

**Hidden Calendar**

1. For the Desktop and Mobile version: On the left are the names of the properties that are being managed. Since the Tree Tops is underlined, it acts as a link that takes you to detail information about it. The same is true for River Rocks..
2. This area is used to move the calendar to focus on other months and years. You click the << and >> buttons to go back and forth one year(desktop) or one month(mobile). The < and > buttons move the calendar back and forth one month (desktop) or one week (mobile) respectively, while the month dropdown lets you quickly select any month you want during the year.
3. The X's indicate that those unit/day combinations are already booked, while the ones that are not checked are currently available.
4. The hidden calendar for a property is enabled by the way the calendar is embedded into your web page. This is used if you don't want guests to see your actual availability calendar. See the appendix in the manual for more information. In the hidden calendar, the prospective guest simply enters their desired arrival date,

5. and the number of nights they are interested in and MakeRez will search for the units in this property group that have availability for that timeframe.

To see more on using the calendar from the property managers perspective, please [watch this video](#). To see how to use the calendar from a guests perspective watch [this video](#).

## EXERCISE 12, Exporting Spreadsheet Data and Exploring the Data

Eres a question that came up for us near the end of December 2014 and we were looking 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 answer our questions. Here is the form you would fill out to ask MakeRez that question.

Which Property ? RiverDance Instructions

Search Parameters			
<input checked="" type="checkbox"/> Make Booking ? Y/N	Y	<input type="checkbox"/> First Charge? Y/N	
<input type="checkbox"/> Send Contract ? Y/N		<input type="checkbox"/> Welcome Sent Y/N	
<input type="checkbox"/> Send Receipt Y/N		<input type="checkbox"/> Thank You Sent Y/N	
<input type="checkbox"/> Waitlist Y/N		<input type="checkbox"/> Purchased Giftcard Y/N	
<input type="checkbox"/> No Room Y/N		<input type="checkbox"/> Retired ? Y/N	
<input type="checkbox"/> Cancelled Reservation Y/N		<input type="checkbox"/> Recontact ? Y/N	
<input checked="" type="checkbox"/> Arrival Lo Hi	2014-01-01	2014-01-31	
<input checked="" type="checkbox"/> Contact Lo Hi	2013-01-01	2013-12-31	

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.

Which Property ?

Search Parameters			
<input checked="" type="checkbox"/>	Make Booking ? Y/N	<input type="text" value="Y"/>	<input type="checkbox"/>
<input type="checkbox"/>	Send Contract ? Y/N	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Send Receipt Y/N	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Waitlist Y/N	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	No Room Y/N	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Cancelled Reservation Y/N	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Arrival Lo Hi	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Contact Lo Hi	<input type="text" value="2013-01-01"/>	<input type="text" value="2013-12-31"/>

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 in days 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 Co	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	nancye	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 v	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	blimcc	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 v	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.

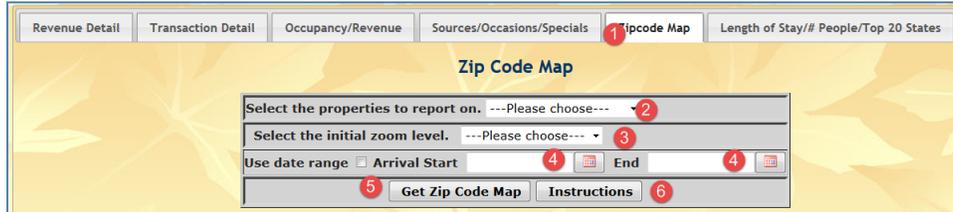
P	Q
<b>% of</b>	<b>Time Lag</b>
<b>Bookings</b>	
10	3
20	9
30	18
40	27
50	40
60	56
70	76
80	97
90	138
100	410

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 than we did in January 2014.

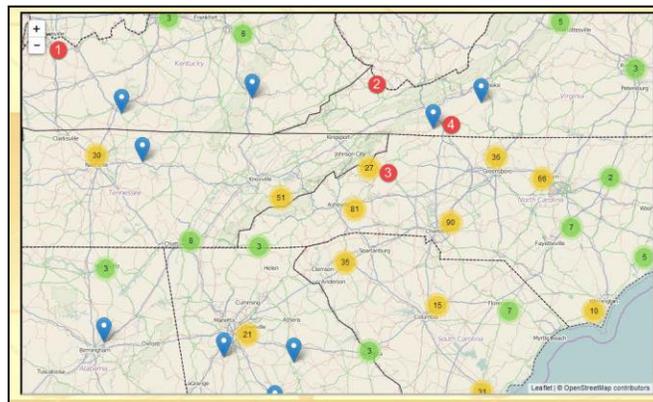
## VIDEO EXERCISE 13, Zip Code Map

Since you have been operating for a few years, you have a sense that there are geographic clusters where many of your guests come from. How can you assess that information and reach out through them to see if there are some untapped marketing opportunities.

### Within the Report Page



1. Click on the Zip Code Map Tab to move to that report
2. Use the property selection to choose the property you would like to look at.
3. The map can initially try to encompass the entire United States, or a state or a county. Use the initial zoom level selection to set your preference.
4. Use the date range fields to focus on the timeframe of interest. If you want all the guests to be included, don't set these fields.
5. Finally click on the **"Get Zip Code Map"** button to create the map itself.
6. If you have questions, click on the **"Instructions"** button for online help.



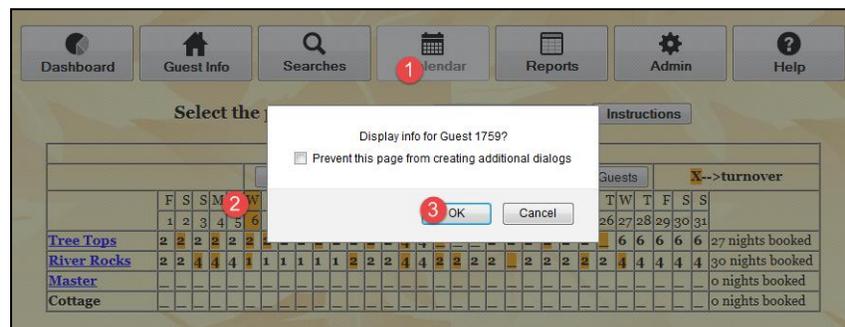
1. On the zip code map itself you can use the +,- controls to zoom the map in and out.
2. The open areas can be used to drag the map to expose other areas by clicking and holding the left mouse button while dragging the mouse to reposition the map.
3. The green and yellow cluster markers represent the count of guest groups that have come from that general area.
4. The blue flags simply represent areas where only a single guest group came from.

To learn more about the zip code map, watch this [video clip](#). To see more about the variety of reports available in MakeRez, please [watch the report video](#).

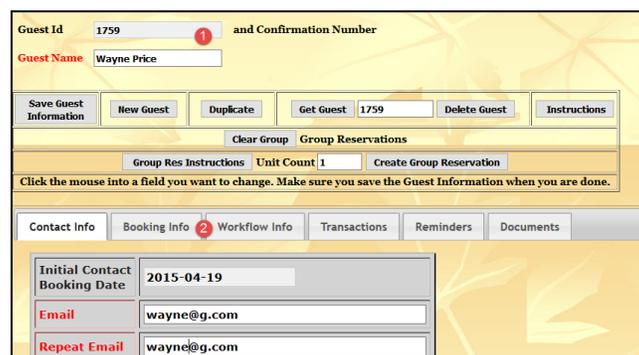
## EXERCISE 14, Houston, do we have a problem ?

One of the more powerful features of MakeRez is how it ties many pieces of information together quickly so you can get answers to your questions and more effectively manage your business. One example of this came to light recently when we were reviewing the “face sheets” we sometime use to take information from folks who are inquiring or making a reservation on the phone.

In this case our written notes about the reservation says that our Tree Tops were staying for three nights. They had been with us for two nights and we knew we had someone else coming into Tree Tops for that next night. Did we have a problem or did they simply change their reservation sometime later and we just didn't record that on the face sheet? To quickly figure that out before it became either an issue we first went to the Calendar page.



1. First you go to the Calendar page by pressing the Calendar button.
2. The orange color surrounding day number six indicates that today is the sixth (of May). We went ahead and clicked on the last night of the Tree Tops stay (May 5<sup>th</sup> in Tree Tops).
3. That brought up a dialog box that asked if we wanted to see more info (the Guest page for guest in the Tree Tops on May 5<sup>th</sup>, guest 1759, the folks we had the questions about). From looking at the calendar it was clear that its current state indicates these folks are only staying for two nights. We select the “OK” button.



1. Here we verify that indeed this is the guest information for guest number 1759, Wayne Price, and
2. we go to the “**Booking Info**” Tab to see how long his reservation was.

Guest Id  and Confirmation Number

Guest Name

Click the mouse into a field you want to change. Make sure you save the Guest Information when you are done.

<b># Adults</b>	<input type="text" value="2"/>
<b># Kids</b>	<input type="text" value="0"/>
<b>Booked</b>	<input type="text" value="Y"/>
<b>Arrival Date</b>	<input style="border: 1px solid red; border-radius: 50%; padding: 2px; font-size: 8px; color: red; float: right; margin-right: 10px;" type="text" value="2015-05-04"/>
<b># Nights</b>	<input style="border: 1px solid red; border-radius: 50%; padding: 2px; font-size: 8px; color: red; float: right; margin-right: 10px;" type="text" value="2"/>

1. In the “**Booking Info**” Tab, we look again see that the
2. The date of Wayne’s arrival is May 4<sup>th</sup>, 2015 which matches when they arrived and
3. number of nights that Wayne is going to be staying is two nights. But as a last check we would like to see what his confirmation email and his contract email say.

Finally we look in the **Actions** area on the **Contact Info Tab** and see the booking was originally for three nights, but a week later the booking was deleted, the number of days were decreased to two and the booking was made again. And a few days later the other guests made their booking.

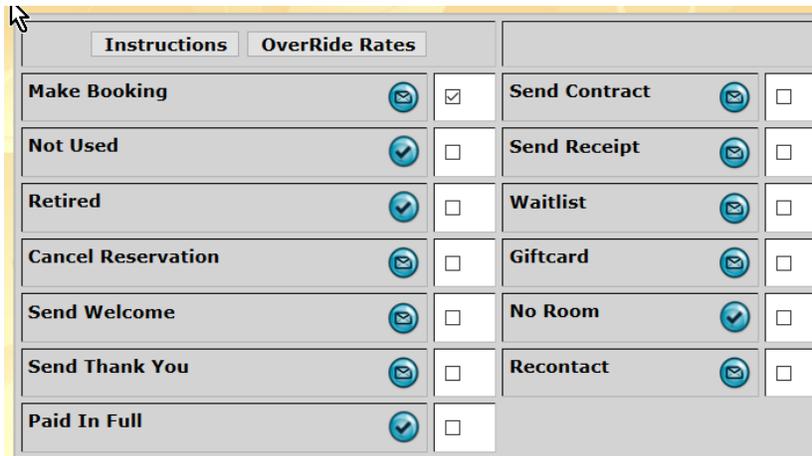
This all took less than two minutes and allowed us to be confident when they came down to breakfast that morning in telling them how much we enjoyed having them stay with us and that we certainly hoped they would come back soon. As it turns out, before they left they booked another three day stay in October !! This time for five adults !!!

## 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 and the property has a **PREMIUM** subscription, 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 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 information requests. 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.



Instructions		OverRide Rates	
Make Booking	 <input checked="" type="checkbox"/>	Send Contract	 <input type="checkbox"/>
Not Used	 <input type="checkbox"/>	Send Receipt	 <input type="checkbox"/>
Retired	 <input type="checkbox"/>	Waitlist	 <input type="checkbox"/>
Cancel Reservation	 <input type="checkbox"/>	Giftcard	 <input type="checkbox"/>
Send Welcome	 <input type="checkbox"/>	No Room	 <input type="checkbox"/>
Send Thank You	 <input type="checkbox"/>	Recontact	 <input type="checkbox"/>
Paid In Full	 <input type="checkbox"/>		

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 Communications 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 property manager listed in the config table. The messages that are marked with a **?** are all initiated by the MakeRez system itself as a PREMIUM service.

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 inquiry response process when it automatically handles an inquiry email from one of the services that you are using for advertising (like HomeAway, Airbnb, FlipKey,...).
- 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. May also be manually sent.
- 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. May also be manually sent.
- 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. make
- 11) **\* receipt** – This is sent out when you select the “**Send Receipt Workflow Task**”. It 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 for PREMIUM subscribers 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 **waitList** 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.

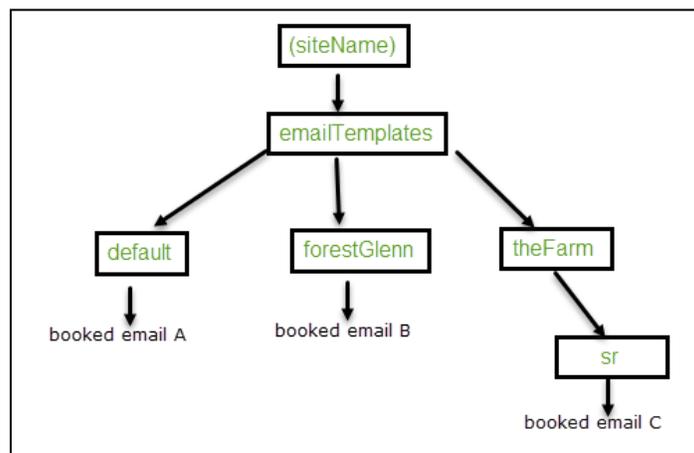
## A Scenario

Let's assume that you are managing two properties with MakeRez. One is a sweet house 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). 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 your default browser and take you 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 Tag** 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. You go to the Guest Page workflow tab and select the "Send Contract" checkbox. The MakeRez system goes through the following steps.

1. First it executes a search strategy as described above to find the right contract email prototype to use.
2. The system will process the contract email file to look for database tags, derived tags, table tags and smart tags and will replace them with the proper information.
3. Finally, MakeRez will also look for a contract.pdf file in the same place it found the contract email file. If found, it will simply "attach" that file to the email and send the resulting email out.

More about the whole email process is detailed in the MakeRez Guide.

## EXERCISE 15, Let's Play 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, be effective at communicating and 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 is effectively getting your message across.

**TIP!**

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. They 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.

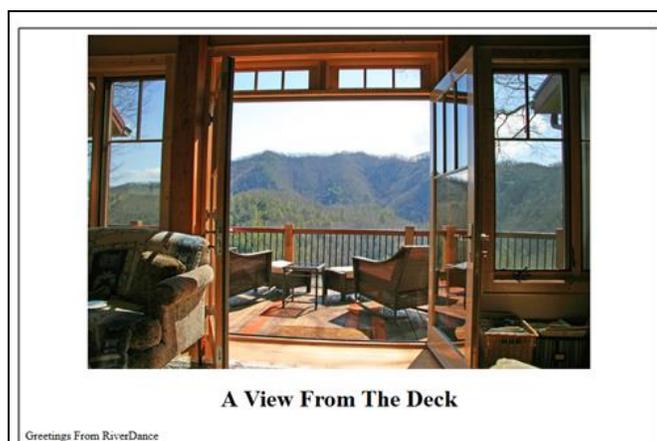
```
<html>
<body>
[[HEADER]]
```

**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.

```

<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 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 we use at RiverDance the use of [[HEADER]] and [[FOOTER]] in this way provides for consistency, ease of maintenance since 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 other information. The bottom line, the [[HEADER]] and [[FOOTER]] approach is available out of the box.

## EXERCISE 16, Managing and Editing System Email Prototypes

Enhancing your email communication with your guests is one of the most important things you can do to keep them informed and engaged both before and after their visit. So you need to craft those emails with care to make sure they effectively represent you and your property. One of the worst feelings in the world is to revise an email, send it out to a guest and realize later that it has misspellings or just doesn't accomplish the task you intended for it. The process detailed in Exercise 16 is essentially a batch process where you can:

1. Grab all the email prototypes from the server
2. Upload them to your local computer as a single zip archive file
3. Un package them into a directory on your local computer.
4. Use text based editing software to make modifications.
5. And reverse the process and storing the altered prototypes back on the server.

### Within the Admin page.

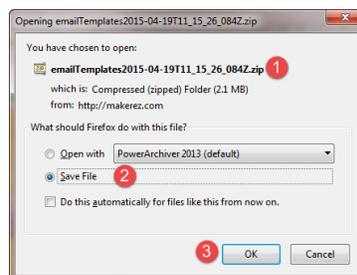
1. Click on the "Email Templates" Tab.
2. To backup your emailTemplates directory, click on the "Do It" button.



After the server creates the emailTemplates backup zip file, you will be presented the following popup to decide where to save it on your computer.

1. This is the default name with date and time embedded in the filename of the backup zip file.
2. By default the save file option is selected, since it doesn't make sense to Open a zip file.
3. Click the OK button to proceed.

Finally your browser will save the downloaded file in its normal fashion.



After backing up, If you want to modify some those email templates, do the following. Move the zip file you just created to an empty folder. Then unzip it. Use a tool like Notepad++ on the PC to modify the email templates that need changing. On the Mac you can use a tool like TextEdit to make the changes. Notepad++ has a nice spell checker and is available for free from <http://notepad-plus-plus.org/>

Once your changes are done, re-zip the directory and use the **Restore Email Templates** to download it back to the server..

1. Click on the "**Browse**" button to select the zipped emailTemplates backup that you want to restore.
2. Click on "Do It" to actually restore the backup to the server.



## EXERCISE 17, Customizing System Emails

Exercise 16 described a batch process for managing and changing your email prototypes. The **emailHelper** page is designed to let you interactively modify the email templates one by one.



1. In the "**Email Section**", enter the template directory where the email you'd like to work on is located. You can look in the paragraph on "Search Strategy" for information about how things are laid out. The Email Section will be a list of directories where the email prototypes actually are kept.
2. After you select the desired Email Prototype directory in step 1, the Prototype dropdown will contain a list of the prototypes in that directory. Select the one you want to examine.
3. Click on the "**Load From Server**" button and the raw version of the prototype your working on
4. will be loaded into the "**Email Prototype**" area. In the example below you can see a number of tags like `[[MGRPHONE]]` and `[[PROPERTY]]` are present. Within this area you can edit the text, add new tags and customize the prototype to meet your needs.
5. When you are done, click on the "**Do Merge**" button to change the tags into information that is associated with guest number 1 in your database, which should be you.
6. Those changes appear in the "**Email To Be Sent**" area. If more changes are needed, you can go back to the "**Email Prototype**" area and continue the process.
7. If you select the "View As Html" button a dialog box will be displayed with the formatted email inside. Also if you want to see how that email will actually look in your email client, you can click on the "**Test Email**" button.
8. Once you are happy with your changes, click on the "**Save Changes To Server**" button to make those changes permanent on the server.

Since the transactional emails have fixed names, you can only modify them. There is no need to create new ones or delete old ones. However, custom emails are handled differently. They can be edited in the same fashion as transactional emails by setting the Email Section to custom, and selecting the desired custom email name to edit. In addition you can use the "Delete From Server" button to delete a custom email that you no longer need. If you try to delete anything other than a custom email, makerez will refuse to do it.

A custom email is created with the following two step process (assuming you are using a pc).

1. First the email is created in something like notepad++ by loading an existing transactional email into the emailHelper and using it as a template for the new one by copying and pasting the raw email into notepad++. Save it out of notepad++ into a file on your desktop with a .txt extension.
2. Next, use the "**Browse**" button in the **File Transfer** area of emailHelper to select that specific file. When you have selected the file, use the "**Do It**" button to actually transfer that file down to the custom email prototype area on the server.
3. Reload the **emailHelper** page and the new custom email will be displayed as one of the choices. It then can be edited like a transactional email.

## EXERCISE 18, Custom Emails, Tennessee Month

The standard email prototype that MakeRez provides do much of the heavy lifting for your email communications. 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 to create custom emails in **MakeRez**. 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>
```

There, a variety of custom emails can be defined, modified and deleted when no longer needed. Custom emails can also use the same Email Tags as the standard emails. Check out the Tag Table in the Guide to learn more about tags.

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, creation of 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, or workflows. 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. Finally, select the Contact checkbox and indicated the desired range of contact dates are between 1/1/2015 and 12/31/2015.

Which Property ? RiverDance Instructions

Search Parameters

<input type="checkbox"/>	Name contains	
<input type="checkbox"/>	Cell contains	
<input type="checkbox"/>	Email contains	
<input type="checkbox"/>	Notes contains	
<input checked="" type="checkbox"/>	State is	TN
<input type="checkbox"/>	Zip Code is	
<input type="checkbox"/>	Booking is	
<input type="checkbox"/>	Source is	---Please choose---
<input type="checkbox"/>	Occasion is	---Please choose---
<input type="checkbox"/>	Special is	---Please choose---
<input type="checkbox"/>	# Nights LO HI	
<input type="checkbox"/>	Arrival LO HI	
<input checked="" type="checkbox"/>	Contact LO HI	2015-01-01 2015-12-31

Send Custom EMail Tennessee.txt Export to CSV Search For Guests

When the 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 selecting the name of the campaign from the dropdown list and clicking on the "**Send Custom EMail**" button.

## Automatically Handling Inquiries

### 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 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)

## EXERCISE 19, Custom Workflows

You'd like to start doing weddings at your property and was curious how MakeRez could potentially help.

1. Within the Admin page,
2. Click on the WorkDef Tab. That displays the work definitions currently in place for your property. MakeRez starts off with eleven standard work definitions and allows for five definitions that you can customize.
3. At the top of the workdef list you can see the standard workflow definitions. These definitions consist of a:
  - a. Index that is the key to accessing that definition in the database. You can't change this.
  - b. Name that identifies what the definition deals with.
  - c. Display Order that dictates the order the definitions are displayed from 0 on up.
  - d. The Action the definition deals with. Currently send an **email**, send a **phone** (text) message, send **both** and email and text message, or just **record** the selection.

Index	Name	Display Order	Action	Description
0	booked	0	both	Make Booking ?
2	firstCharge	1	email	First Charge?
1	contract	2	email	Send Contract ?
8	welcome	3	email	Welcome Sent

1. If you scroll down the list you will see the workflow definitions that have Custom in their name. They are tagged with a negative Sort Order to indicate they should not actually be used.

6	cancelled	10	email	Cancelled Reservation
11	recontact	11	email	Recontact ?
12	custom1	-12	record	Custom WorkDef 1
13	custom2	-13	record	Custom WorkDef 2
14	custom3	-14	record	Custom WorkDef 3

1. If you select the custom1 definitions, its elements will be copied down to the edit area where you can make changes. You should change the Name
2. And make the Display Order positive (in this case 12),
3. Typically the action for most custom workflows would be Record and
4. You need to add in a short description, like Wedding ?

Update this WorkDef		Cancel this Update		
Index	Name	Display Order	Action	Description
-12	custom1 <span style="color:red">1</span>	-12 <span style="color:red">2</span>	record <span style="color:red">3</span>	Custom WorkDef 1 <span style="color:red">4</span>

1. Here is the edit area after the changes have been made. To save the changes back into the workflow definition list, click on the **“Update this WorkDef”** button.

<span style="color:red">1</span> Update this WorkDef		Cancel this Update		
Index	Name	Display Order	Action	Description
-12	wedding	12	record	Wedding ?

1. When you update a workflow, you are changing its definition and part of that may mean you want to take it out of the workflow record for previous guests. If you want to go ahead and do that click on **“OK”**, if not click on **“Cancel”**.

Should we orphan all previous uses of this workflow ?  
Careful, this operation is not reversable !!

1

1. Once the edited workflow definition is copied back into the workflow definition list, it will look as below with the changes you made. But the Index will be negative to indicate that this record still need to be updated in the database.

11	recontact	11	email	Recontact ?
-12	wedding <span style="color:red">1</span>	12	record	Wedding ?
13	custom2	-13	record	Custom WorkDef 2

1. Once you click on the **“Save WorkDefs”** button, those changes will actually be made in the database and the Index will return to positive.

11	recontact	11	email	Recontact ?
12	wedding	1	record	Wedding ?
13	custom2	-13	record	Custom WorkDef 2

1. If you then go to the Workflow Tab in the Guest page for a specific guest, you will now see the wedding workflow presented. Click on its checkbox to put the guest on the wedding list.

<b>Instructions</b>		<b>Display Rates</b>	
<b>Make Booking ?</b>	 	<input type="checkbox"/>	<b>First Charge?</b>
<b>Send Contract ?</b>		<input type="checkbox"/>	<b>Welcome Sent</b>
<b>Send Receipt</b>		<input type="checkbox"/>	<b>Thank You Sent</b>
<b>Waitlist</b>		<input type="checkbox"/>	<b>Redeemed Giftcard</b>
<b>No Room</b>		<input type="checkbox"/>	<b>Retired ?</b>
<b>Cancelled Reservation</b>		<input checked="" type="checkbox"/>	<b>Recontact ?</b>
<b>Wedding ?</b>		<input type="checkbox"/>	

1. Also, if you go to the Search page and
2. By clicking on the **“Workflow Search”** Tab

 Dashboard	 Guest Info	 Searches <sup>1</sup>	 Calendar	 Reports	 Admin	 Help
Guest Search	Workflow Search <sup>2</sup>	Reminder Search				

1. You will see that the WorkFlow Search now also has the new Wedding definition in it. Set the property group you would like to search for,
2. Click on the checkbox to the left of the Wedding ? label and
3. Enter "Y" to indicate that this search is to be for guests on the wedding list.

Which Property ? RiverDance 1 Instructions

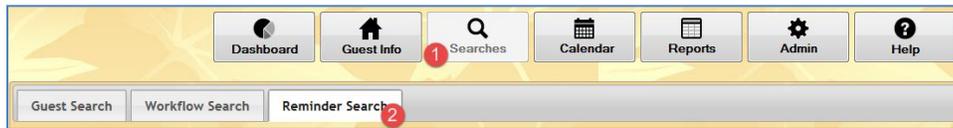
Search Parameters			
<input type="checkbox"/>	Make Booking ? Y/N	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Send Contract ? Y/N	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Send Receipt Y/N	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Waitlist Y/N	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	No Room Y/N	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Cancelled Reservation Y/N	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Wedding ? Y/N	Y <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">3</span>	<input type="checkbox"/>
<input type="checkbox"/>	Arrival Lo Hi	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Contact Lo Hi	<input type="text"/>	<input type="checkbox"/>

Once the wedding custom workflow is set up, you can create a guest record for a prospective wedding party. In it you can use the guest notes field, transactions and reminders to help you move the wedding forward and hopefully not only book the wedding, but lodging as well.

To learn more about using custom workflows, please [watch the video](#).

## VIDEO EXERCISE 20, Searching

You know a guest that is coming this week has asked about tickets for the Biltmore House and you created a reminder. You don't have Admin privileges, so you can't go to the Reminders Tab in the Admin page. This is how you can find the guest so you can call them to discuss what time they want tickets.



1. Go to the Search page and
2. Click on the "Reminder Search" button

Which Property ? ---Please choose--- Instructions

Search Parameters

<input type="checkbox"/>	Guest Id is	<input type="text"/>	<input type="checkbox"/>	Reminder State is	---Please choose---
<input type="checkbox"/>	Prop/Unit is	<input type="text"/>	<input checked="" type="checkbox"/>	Description contains	Biltmore
<input type="checkbox"/>	Entry Date Lo	<input type="text"/>		Entry Date Hi	<input type="text"/>
<input type="checkbox"/>	Due Date Lo	<input type="text"/>		Due Date Hi	<input type="text"/>

Export to CSV Search For Reminders

1. Once the Reminder Search is displayed, click the "Description contains" checkbox.
2. Type in the word Biltmore. No property information is entered since this is a general search.
3. Finally click on the "Search For Reminders" button to start the search.

due within 7 days past due

Id	State	Entered	Due	Guest Id	Prop/Unit	Description	Comments
8	P	2015-04-08	2015-04-24	282		Biltmore Tix	Xmas

1 to 1 of 1 rows Rows/Page 10

1. That will display the results of the search and in this case there is only one match for guest number 282. To find out more information on that guest, go to the Guest and enter in 282 in the "Get Guest" field and click on the "Get Guest" button.
2. If many matches are returned you can use the paging control to view them.

To learn more about searching for guests, please [watch the video](#)

## Appendix A – 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

- `<p></p>` tags. They enclose sentences that should be set apart in a paragraph.
- `<br>` tag. Indicates a line break.

### Formatting Tags

- `<b></b>` tags. They enclose words that should appear in bold.
- `<i></i>` tags. They enclose words that should appear in italics.
- `<u></u>` tags. They enclose words that should appear underlined.
- `<span></span>` tags. They enclose words that can be "styled" by options in the opening `<span>` tag. The format for the opening span tag is `<span style="attribute1:value1;attribute2:value2">`. 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:** `<span style="color:red;font-size:12px;font-weight:bold;">Hi mom</span>` will produce the words Hi mom in bold, with a red color and the font size will be 12 pixels tall.

### Link Tags

- `<a></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:** `<a href="http://www.riverdancenc.com/availability.php">RiverDance Availability</a>`

### 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>.

