



# Add a New Unit to an Owner

## Quick Reference Guide

Date: October 15

### Introduction

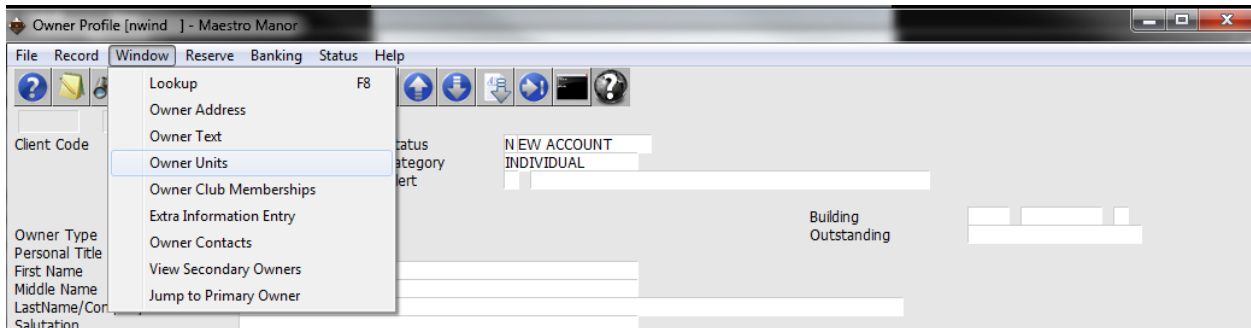
This Quick Reference Guide will guide the user through the process of adding a new unit to an existing Owner Profile, in the owner Maintenance module.

### Linking a Unit

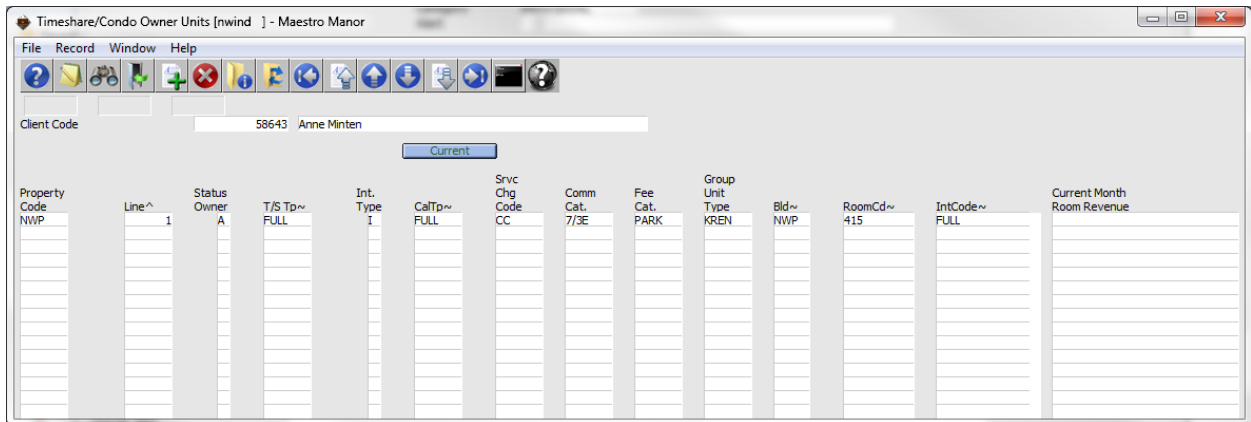
Units are linked to an Owner through Owner Profile Screen.

To add a unit,

- Begin on the Owner Management Main Screen,
- Select the Profile menu, and then
- Select Profile, Lookup (F8) or enter the Clint Code number, to display the following screen.



There are two methods either select the Window drop down menu then select Owner Units or Drill Down (F5) on the Building Field to display the following screen,- the Timeshare/Condo Owner Units Screen - the system will auto populate the client Code and Name and show the units that are currently effective, to see all units select the "Current" Button to display "All".



To begin the process of linking another Owner Unit, create (F6) the following screen will display.

Owner Units [nwind ] - Maestro Manor

File Record Window Help

Create

Client Code 58643 Anne Minten

Line Number 1

Status Code A

Unit Group Type

Timeshare Type

Building

Interval Type

Room Number

Calendar Type

Interval Code

Int Bi-Annl Flag

Comp. Pcly Code

Exchange Code

Insurance Code

Mtce Fee Schd

Trace Msg

Carry Fwd Years

Lease Number

Carry Bkwd Yrs

Purchase Date

Contract Term

First Use Year

Expiry Date

Sales Person

Closing Date

Conditions of Sale

Effective Date

Last Booked Date

Srvc Charge Code

Last Used Date

Commission Cat.

Charge Workorder

Fee Category

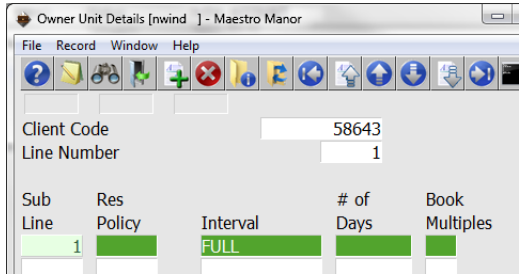
# Days Maximum

Perc. Owned

Sell Unconfirmed

Complete the screen based on the information below, exactly the same as a new unit.

Line Title	Explanation
<b>Client Code</b>	Prepopulated by the system
<b>Line Number</b>	Prepopulated based on the previous screen
<b>Status</b>	Prepopulated based on the previous screen
<b>Timeshare Type</b>	Lookup (F8) to select. This is a Mandatory field
<b>Interval Type</b>	Prepopulated based on the Timeshare Type setup. This may be changed if the unit does not conform to the setup. This is a Mandatory field
<b>Calendar Type</b>	Prepopulated based on the Timeshare Type setup. This may be changed if the unit does not conform to the setup. This is a Mandatory field
<b>Int Bi-Annl Flag</b>	This is an information screen only if this was entered in the Timeshare setup that it will be prepopulated. Select Y for yes and N for no. This is Not a Mandatory field. It will not affect any charging or fees.
<b>Exchange Code</b>	This is an information screen only if this was entered in the Timeshare setup will it be prepopulated. This is Not a Mandatory field and it will not affect any charging or fees.
<b>Mtcs Fee Schd</b>	Lookup (F8) or type in the code. This is a Mandatory field
<b>Carry Fwd Years</b>	This is an information screen only if this was entered in the Timeshare setup will it be prepopulated. This is Not a Mandatory field
<b>Carry Bkwd Years</b>	This is an information screen only if this was entered in the Timeshare setup will it be prepopulated. This is Not a Mandatory field
<b>Contract Term</b>	Select P=Permanent or T=Temporary. This is Not a Mandatory field
<b>Expiry Date</b>	When adding a new unit this field is not mandatory but may be used up to the last date in the system (at time of documentation the last year is 2078). This field is used when the owner no longer owns the unit and will direct the system if required to prorate fees and stop generating revenue.
<b>Closing Date</b>	For information only this field may be used for any date required
<b>Effective Date</b>	This is the date the owner will start generating revenue or be able to book their unit
<b>Srvc Charge Cat</b>	Lookup (F8) or type in the code. This is a Mandatory field
<b>Commission Cat</b>	Lookup (F8) or type in the code. This is a Mandatory field
<b>Fee Cat</b>	Lookup (F8) or type in the code. This is a Mandatory field
<b>Perc Owned</b>	Prepopulated based on ownership of unit
<b>Sell Unconfirmed</b>	This is Not a Mandatory field and is for future use

<b>Unit Group Type</b>	Lookup (F8) or type in the code. This is a Mandatory field
<b>Building</b>	Lookup (F8) or type in the code. This is a Mandatory field
<b>Room Number</b>	Lookup (F8) or type in the code. This is a Mandatory field Only the units within the Grouping will appear on this list
<b>Interval Code</b>	<p>This field will be prepopulated if the Timeshare Type is Full after exiting the screen. If the unit is linked to a timeshare week, Drilldown (F5) just before you exit the screen the following screen will display</p>  <p>If the interval is less than full, Lookup (F8) and select the correct interval.</p>
<b>Comp. Plcy Code</b>	Lookup (F8) or type in the code. This is a Mandatory field
<b>Insurance Code</b>	For information only, this field may be used for the insurance the owner has, if completed in the Owner Management Maintenance Module
<b>Trace Msg</b>	Drilldown (F5) Owner Trace messages are similar to Front Desk Trace Messages
<b>Lease Number</b>	For information only
<b>Purchase Date</b>	For information only
<b>First Use Year</b>	For information only
<b>Sales Person</b>	For information only
<b>Conditions of Sale</b>	For information only
<b>Last Booked Date</b>	This field will populate with the last Booked Date of this unit
<b>Last Used Date</b>	This field will populate with the last Used Date of this unit
<b>Charge Workorder</b>	Select a Y (yes) if Maestro should allow Maestro workorders to be charged to the owner or the approved account. Select N (no) if Maestro workorders will not be allowed to be charged to the unit
<b># Days Maximum</b>	Type in the maximum number of nights a guest may stay in this unit, it will not affect the number of nights the Owner may stay in the unit. Leave the field blank if there are no restrictions

After all the fields are completed, save and exit (F4).

If more units are to be added, (linked), select Create (F6) and repeat the process

To view the completed Owner Unit Screen Drill down (F5) on the line the following screen will be displayed.

Note the Interval code field is filled in.

Client Code	58643	Anne Minton	
Line Number	1		
Status Code	A	Unit Group Type	KREN
Timeshare Type	FULL	Building	NWP
Interval Type	I	Room Number	415
Calendar Type	FULL	Interval Code	FULL
Int Bi-Annl Flag	N	Comp. Plcy Code	AA
Exchange Code		Insurance Code	
Mtce Fee Schd	MFP1	Trace Msg	
Carry Fwd Years	1	Lease Number	
Carry Bkwd Yrs	1	Purchase Date	
Contract Term	P	First Use Year	
Expiry Date		Sales Person	
Closing Date		Conditions of Sale	
Effective Date	07/01/2014	Last Booked Date	
Srvc Charge Code	CC	Last Used Date	
Commission Cat.	7/3E	Charge Workorder	Y
Fee Category	PARK	# Days Maximum	
Perc. Owned	100.00		
Sell Unconfirmed			