



Creating Owner Profiles and Linking Owned Units

Quick Reference Guide

Date: October 15

Introduction

This Quick Reference Guide will guide the user through the process creating a new Owner and linking a unit in the owner Maintenance.

Each owned unit must be attached “linked” to an Owner Profile for billing and charging purposes. Only Authorized users can create or modify an Owner Profile.

Create a new Owner Profile

To create a New Owner Profile:

- ➔ Begin on the Owner Management main menu screen
- ➔ Select Profile,
- ➔ Select “Owner Profile”.

Look up (F8) in the Client Code Field to search for an owner to avoid duplicate entries of owner profiles.

Search for the owner using any of the field options:

Once the search criteria are entered, search:



- For Current Owners only by leaving the button on the bottom left of the screen on Current Owner.
- For current owners and past owners by clicking the Current Owner button and changing this to Owner.
- To search for all client profiles in Maestro (not just Owner profiles) click the Owner button and change it to All.

Select the OK button and the following screen will display.

Client Name	ClientId	CntType	R	\$	AR	Phone Number	City
Minten, Bill (Mr)	58450	OWNER	N	N		123-123-1234	Schenectady
Minten, Terry (D/D)	33454	TRANS	N	N		705-333-4444	Markham
Minten, Terry (Miss)	58414		N	N		123.123.1234	Schenectady
Minten, Terry (Miss)	58457	OWNER	N	N		123-123-134	Schenectady

From the screen shown above highlight an existing profile Press enter.

If a new profile is needed, select (F4) to return to the Owner Profile screen.

Owner Profile [nwind] - Maestro Manor

File Record Window Reserve Banking Status Help

Client Code: [] Status: [] Category: [] Alert: []

Owner Type: [] Building: [] Outstanding: []

In the Client Code field, Select (F6) create, to display the Client Profile Screen

Note: If this is a new installation and all clients will have a new profile the user may press (F6) to create a new profile in the Client Code Field on the Owner Profile screen without the Look up (F8) sequence.

Client Profile [nwind] - Maestro Manor

File Record Window Text Interface Help

Client Code: 58643 Active: INDIVIDUAL

Alert: [] Rate Types: []

Client Type: [] Personal Title: [] First Name: [] Middle Name: [] Surname: [] Salutation: [] Title: [] Attention: []

The client code will automatically be populated with the next available client number

Complete all mandatory fields as required by the property, client profiles are shared globally throughout Maestro.



An owner may own units in more than one property but should only have one Owner Profile.

Once the Client Profile screen is complete, Save and Exit (F4) to display the Owner Profile Screen

Many of the fields in the Owner Profile Screen will be prepopulated from the Client Profile screen

The owner status will default to "New". To change the Status

Select the status menu

Select Activate Owner

The category will default to "Individual". If the owner profile should not be Individual place the Category

Field Look up (F8)

Select the correct category.

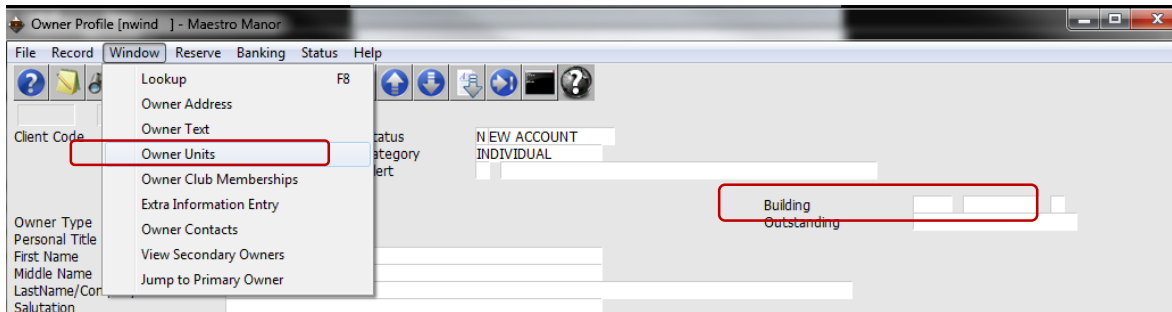
Complete these next fields if required.

1. The Owner Type based on the set up in Owner Management Maintenance look up (F8) select the appropriate Owner Type.
2. Owner Password and Owner Hint are reserved for future use
3. Federal ID is used for 1099 reporting (a US Income Statement that is governed by US legislation.)
4. Other Tax ID (non US tax information)
5. Reporting Type is reserved for future use.
6. Owner Type is a text box similar to Client Text.

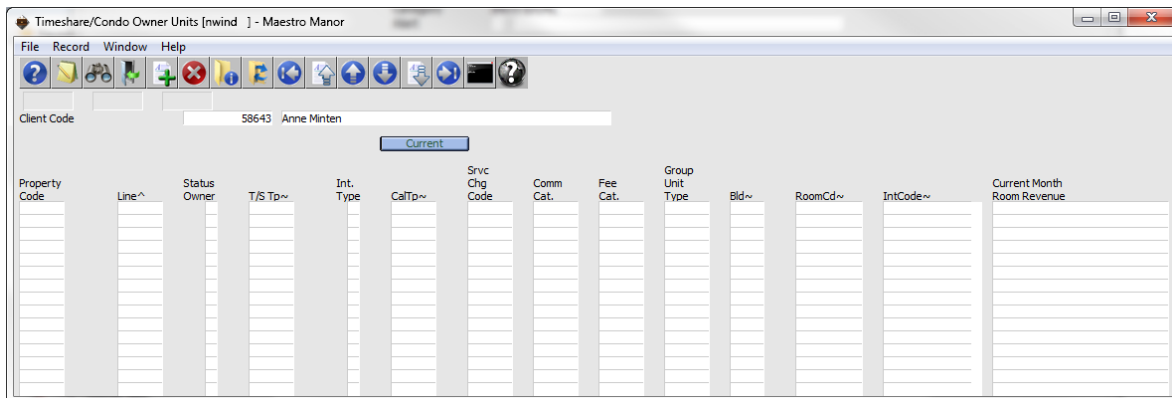
Linking a Unit

Units are linked from the Owner Profile Screen. Each owner or group of owners should have only one Client profile and only one Owner profile

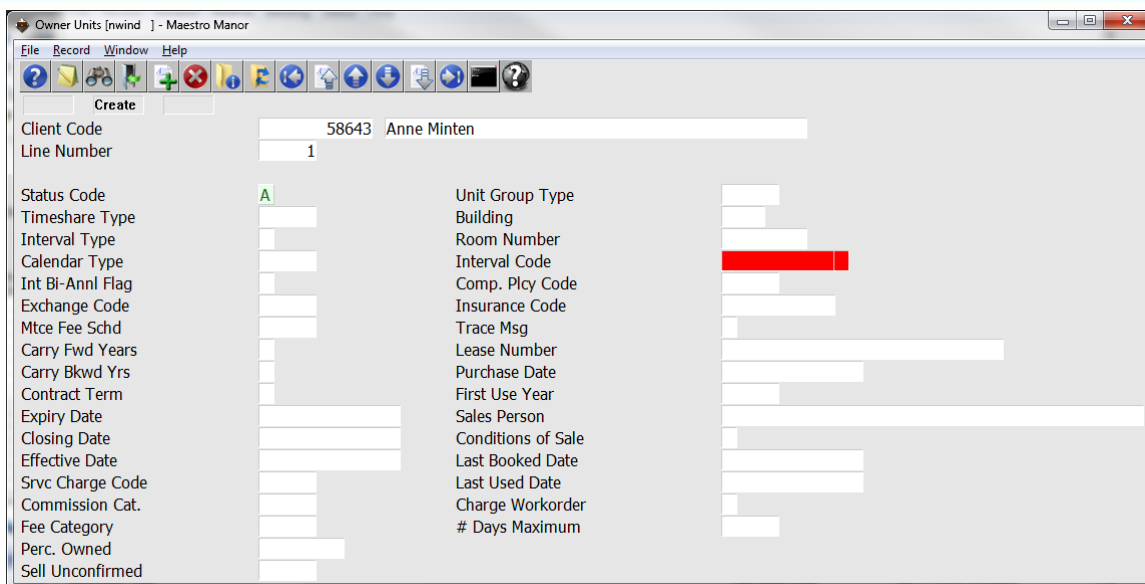
To add a unit, there are two methods either select the Window drop down menu then
Select Owner Units
Or Drill Down (F5) on the Building Field



Either option will display the Timeshare/Condo Owner Units Screen, the system will auto-populate the client Code and Name.

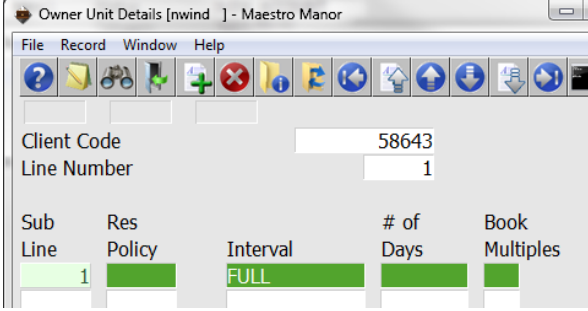


To begin the process of linking a new Owner Unit, create (F6) to display the Owner Units Screen.



Complete the screen based on the information below

Field Title	Explanation
Client Code	Prepopulated by the system
Line Number	Prepopulated based on the previous screen
Status	Prepopulated to "A" Active it may be changed at a later date to Non Active where revenue will not be generated and statement will not print Suspended where revenue will not be generated but statements will print
Timeshare Type	Look up (F8) to select the correct Type This is a Mandatory field
Interval Type	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
Calendar Type	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
Int Bi-Annl Flag	This is an Information screen only if this was entered in the Time share setup it will be prepopulated. Select Y for yes and N for no. This is Not a Mandatory Field it will not affect any charging fees or reporting.
Exchange Code	This is an information screen only if this was entered in the Time share setup it will be prepopulated This is Not a Mandatory Field it will not affect any charging, fees or reporting.
Mtcs Fee Schd	Look up (F8) or type in the code, This is a Mandatory field
Carry Fwd Years	This is an Information screen only if this was entered in the Time share setup it will be prepopulated This is Not a Mandatory Field
Carry Bkwd Years	This is an Information screen only if this was entered in the Time share setup it will be prepopulated This is Not a Mandatory Field
Contract Term	Select P= permanent or T= Temporary This is a Mandatory field
Expiry Date	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.
Closing Date	For information only this field may be used for any date required
Effective Date	This is date the owner will start generating revenue or be able to book

	their unit
Srv Charge Cat	Look up (F8) or type in the code, This is a Mandatory field
Commission Cat	Look up (F8) or type in the code, This is a Mandatory field
Fee Cat	Look up (F8) or type in the code, This is a Mandatory field
Perc Owned	Prepopulated based on ownership of unit
Sell Unconfirmed	This is Not a Mandatory Field and is for future use.
Unit Group Type	Look up (F8) or type in the code, This is a Mandatory field
Building	Look up (F8) or type in the code, This is a Mandatory field
Room Number	Look up (F8) or type in the code, This is a Mandatory field Only the Units within the Grouping will appear on this list.
Interval Code	<p>This field will prepopulate if the Timeshare Type is Full after exiting the screen. If the unit is linked to a timeshare week drill down (F5) just before you exit the screen the following screen will display</p>  <p>If the interval is less than Full Look up (F8) and select the correct interval.</p>
Comp. Plcy Code	Look up (F8) or type in the code, This is a Mandatory field
Insurance Code	For information only, this field may be used for the insurance the owner has, if completed in the Owner Management Maintenance Module
Trace Msg	Drill down (F5) Owner Trace messages are similar to Front Desk Trace Messages
Lease Number	For information only
Purchase Date	For information only
First Use Year	For information only
Sales Person	For information only
Conditions of Sale	For information only
Last Booked Date	This field will populate with the last Booked Date of this unit
Last Used Date	This field will populate with the last Used Date of this unit
Charge Workorder	Select a Y (yes) if Maestro should allow Maestro workorders to be charged to the owner or the approved account. Select a N (no) if Maestro workorders will not be allowed to be charged to the unit,
# Days Maximum	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) to display the Timeshare/Condo Owner Units screen.



Timeshare/Condo Owner Units [nwind] - Maestro Manor

File Record Window Help

Client Code 58643 Anne Minten

Current

Property Code	Line	Status	T/S Tp	Int. Type	CalTp	Srv Chg Code	Comm Cat.	Fee Cat.	Group Unit Type	Bld	RoomCd	IntCode	Current Month Room Revenue
NWP	1	A	FULL	I	FULL	CC	7/3E	PARK	KREN	NWP	415	FULL	

If more units are owned, select Create (F6) and repeat the process

To view the completed Owner Unit Screen Drill down (F5) to display Owner Units Screen.

Note that the Interval code field is filled in.

Owner Units [nwind] - Maestro Manor

File Record Window Help

Client Code 58643 Anne Minten

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. Pcly 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	
Srv Chg Code	CC	Last Used Date	
Commission Cat.	7/3E	Charge Workorder	Y
Fee Category	PARK	# Days Maximum	
Perc. Owned	100.00		
Sell Unconfirmed			

Authorization Levels

Only authorized users may create, delete or modify an owner profile or link units to an owner.

To give users authorization:

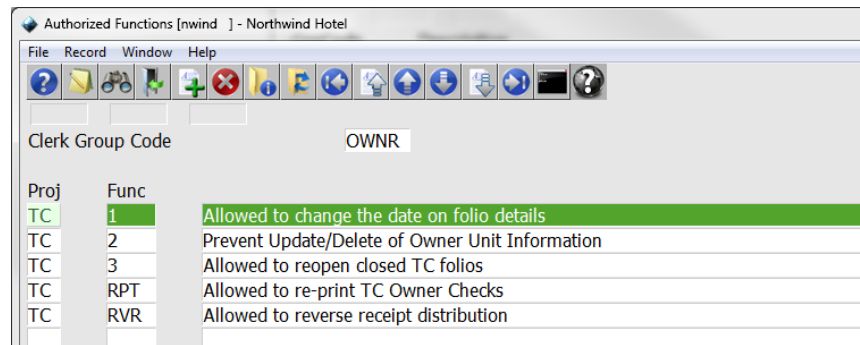
- ➔ Begin on the Global Menu Main Screen,
- ➔ Select Security,
- ➔ Select Clerk Group Code Maintenance

Select or create a group (see Global Security QRG for more comprehensive information) by highlighting the line.

Then select the window drop down and

Select Authorized functions.

Add the “TC” functions to the Clerk Group Code



Is very important to note that, TC 2 is the function that will restrict users from adding, deleting or updating an Owner Profile, or unit