RezNEWS HOT TIP

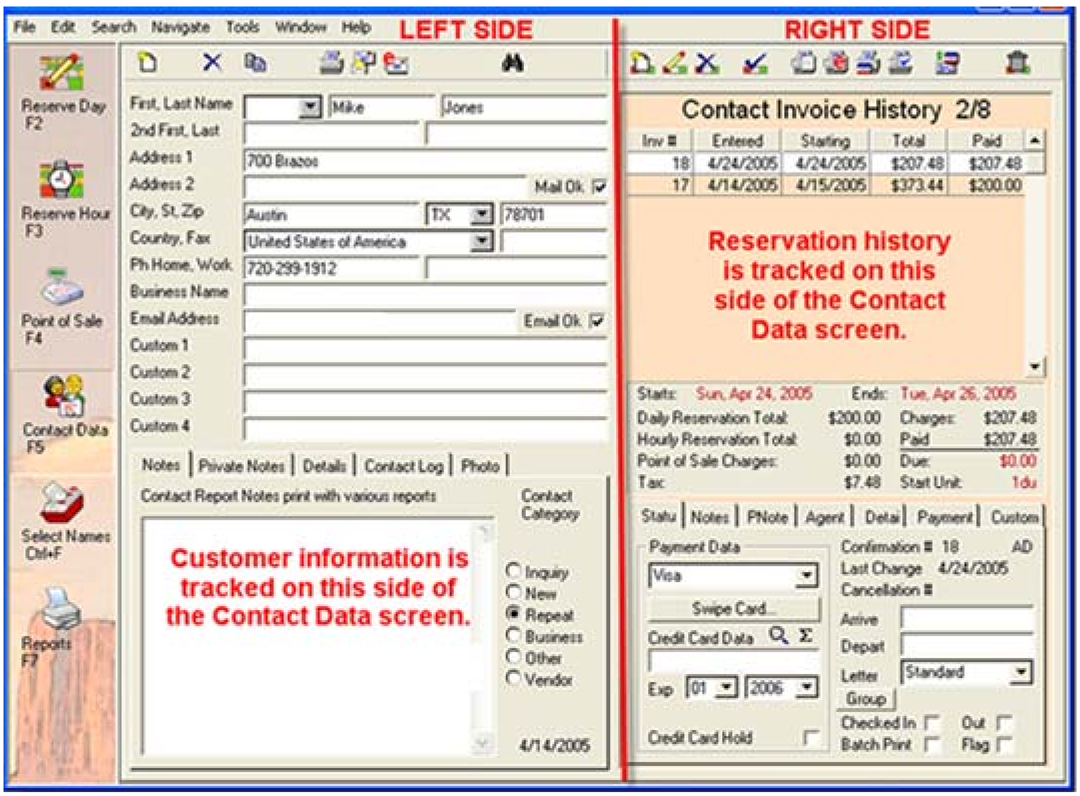
How to correctly use the Contact Data screen in RezStream Professional!

Did you know RezStream Professional allows users to store information about your individual contacts and also allows you to store invoice data? This month's **HOT TIP** will illustrate how to utilize the Contact Data screen, how to store permanent contact data, and how to store individual reservation information correctly for optimum functionality.

The Contact Data screen is divided into **two parts:** the **left side**, which contains information about your individual contacts or customers, and the **right side**, which contains invoice history, current invoices, and invoice financial data.

Left side of the Contact Data screen:

The left side of the Contact Data screen contains permanent data for your customers. Typically this information will not change.



The icons on the upper left of the screen affect information about the customer's address and other relatively stable information.

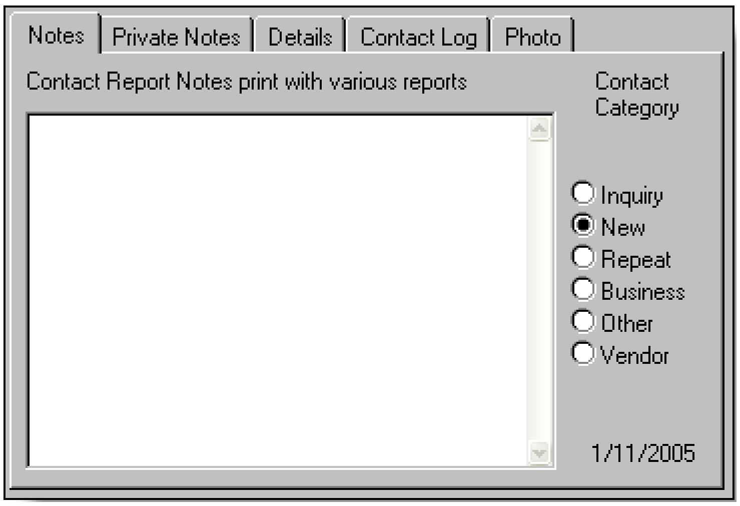
Contact tabs

There are five tabs on the left side of the screen that contain various information specific to the contact that is selected. You can edit the titles of these tabs in the List Edit section from the dropdown menu in the Tools tab.

Note: the Notes tab (also referred to as "Contact Notes") is used to record general notes about a guest and contains guest category information. In general, these notes do not change (e.g. guest preferences, etc.). These notes can be printed on some housekeeping reports and can be used in letters.

Contact Category indicates the guest "status" or "relationship, which is either:

a. Inquiry (a guest that has never stayed at your property);
b. New (a guest that has stayed once);
c. Repeat (a guest that has stayed more than once);
d. Other (a contact that does not fit in the above categories); or
e. Vendor (a contact that you would like to display on the Vendor list)



Private Notes: the Private Notes tab is used to record notes about the guest that are private in nature. "Private Notes" are separate from "Notes" so that you can determine which set of notes may be printed on housekeeping reports and in letters.

Details: the Details tab displays guest Interests and Activities, Special Occasions (such as birthdays), Contact Check Box Flags, and Referral Source.

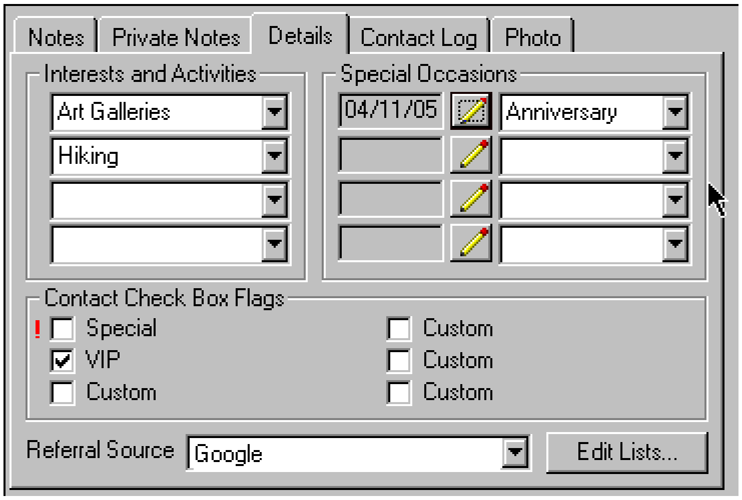
● Interests and Activities and Special Occasions can be edited by clicking the List Edit from the Tools dropdown list, then selecting Interests/Titles or Occasions/Holidays.

Note: if you add new items to these lists, you must restart RezStream for the items to be available. You can search on Interests and Occasions via the Select Names screen.

● Contact Check Box Flags can be used in the Select Names screen to build a query. In addition, you can use the check box with the exclamation mark (!) to flag a "VIP," "Not welcome", or otherwise "special" guest. You can change the titles of the Check Box Flags by clicking List Edit, then Labels, then Contact Check Boxes.

● Referral Source can be used to select the original contact referral source. This is different from the invoice referral source, which is recorded when a reservation is made, and specific to each reservation (not to the contact).

Note: most reports use the invoice referral source. You can search on referral sources via the Select Names screen.



Contact Log: the contact log is used to track detailed correspondence that is sent from within RezStream, including letters and e-mail. You can save a unique copy of letters and emails sent if you set the option to "Save Letters," and use the Print Letter option to print letters or send emails.

Note: you can also add new entries to the log manually. Please see the Contact Log section for further details.

To delete an entry from the Contact Log, click the Delete button, and enter your password when prompted.

Photo: the Photo tab can be used to save a photo of the guest. Click Pick Photo to add a new photo.

Note: photos must be in Bitmap (bmp), GIF, or JPEG (jpg) format, and should be as small in size as possible (400x300 pixels or less).

Important: When you are finished entering data there is no need to "save" the data. As soon as you move to another screen anywhere else in the program, this data will be saved.

Right side of the Contact Data screen (Contact Invoice History):

The right side of the Contact Data screen contains invoice and reservation history information.

Contact Invoice History

This section lists all invoices assigned to this contact, listed by invoice number. The invoice history includes: entered date (the date the reservation was added), starting date, total charges on the invoice (including tax), and total amount paid. The number displayed next to the title is the number of reservations booked for this contact, followed by the number of nights booked for this contact.

Reservation Details

The reservation details section displays *two* sections: the Reservation Summary, which gives you a quick snapshot of reservation information; and the Invoice Tabs section, which displays additional detailed information about the selected reservation.

1) Reservation Summary

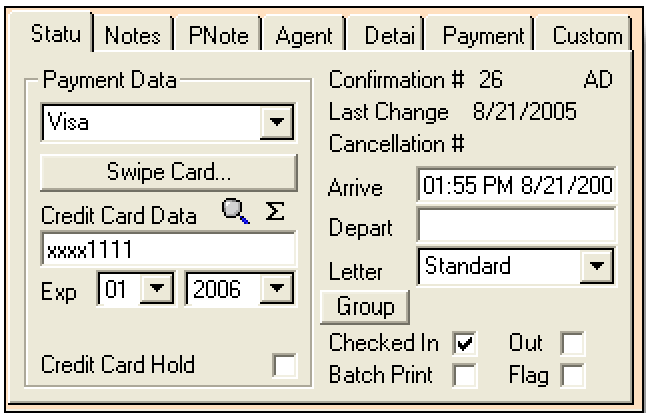
The Reservation Summary lists specific details for the reservation, including unit assigned for this reservation, the arrival and departure dates, total room charges, total hourly reservation charges, total point of sale charges, total tax, total amount paid, and total amount due.

2) Invoice Tabs

There are five tabs on the right side of the screen that contain various information specific to the invoice or reservation that is selected.

Note: You can edit the titles of these tabs in the List Edit section.

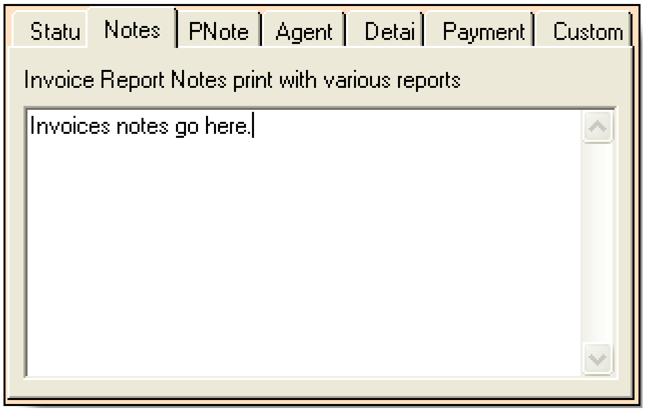
Status: this tab is where you record new credit card information, add a reservation to an existing group reservation or create a new group reservation, and record other data such as arrival and departure time.



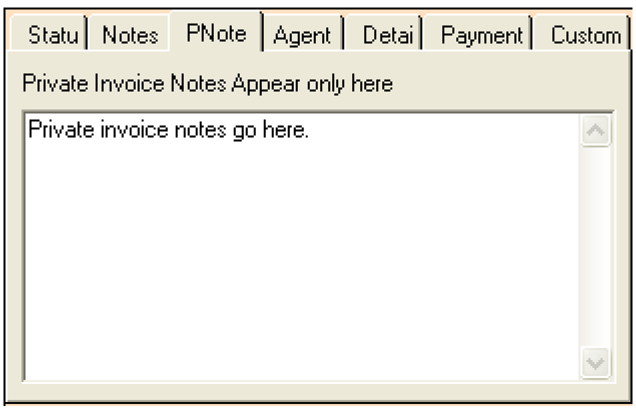
From this section you can:

a. Edit or add a credit card;
b. Set the Credit Card Hold flag;
c. Edit the confirmation number;
d. View the history of transactions and changes on an invoice, listed according to employee initials, date, and time;
e. Edit the cancellation number by left-clicking on the number;
f. Edit the arrival and depart time, which will print on some housekeeping reports.
g. Set the letter to be printed for a batch print;
h. Add the reservation to an existing group reservation or create a new group;
i. Check in or out the guest; *and*
j. Flag the reservation to display with a special color on the Reserve Day screen

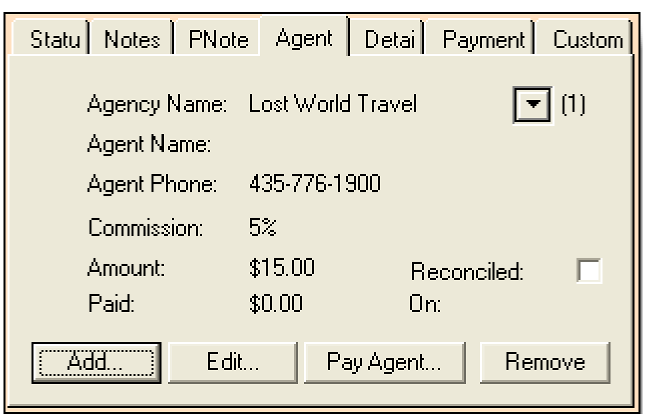
Invoice Notes: enter notes for a reservation here. These notes can be printed on some reports, such as the housekeeping reports, and can be displayed in a letter by using the <INOTE> code.



Private Notes: enter private notes for a reservation here. These notes can be printed on some reports, such as the housekeeping reports, and can be displayed in a letter by using the <PINOTE> code.

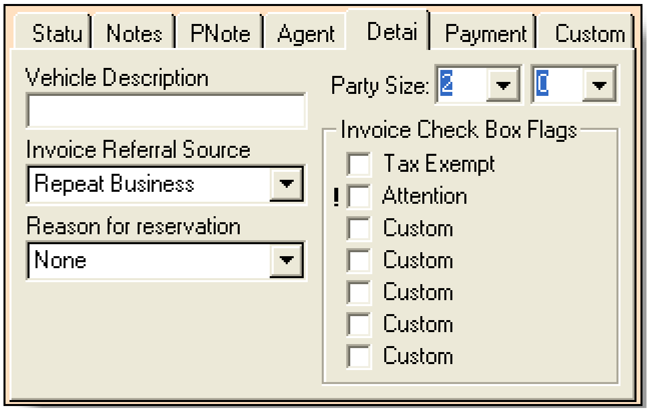


Agent: displays any Travel Agents which will be paid a commission for this reservation, the amount owed to the agent, amount paid to the agent, etc. See the Travel Agents topic for more details.



Details: this tab allows you to set vehicle description, party size, referral source, reason for stay, and set invoice check box flags, which are searchable from Select Names.

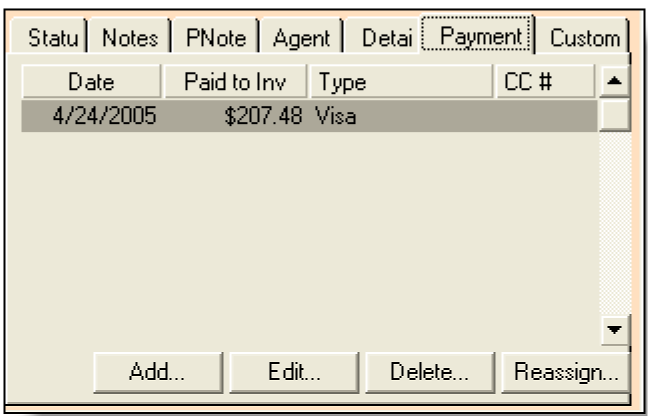
Note: selecting the check box with the '!' (exclamation mark) will flag the reservation on the Reserve Day screen with an '!' icon.



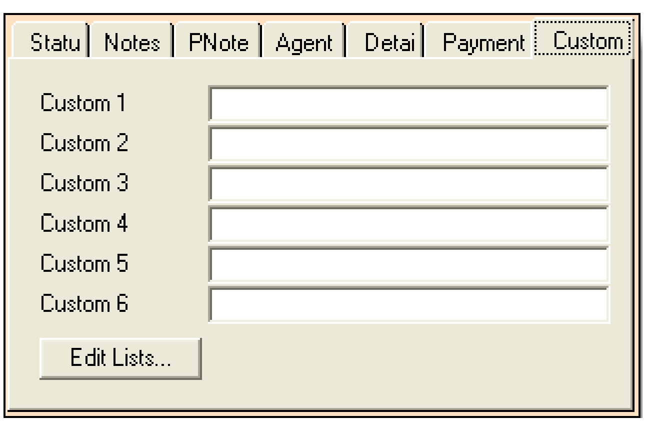
● The Invoice Referral Source is set when the reservation is made, but can be changed in the Details tab. This referral source is used for most tracking reports. You can edit the types of referral sources in the List Edit section.

● The Reason for reservation is set when the reservation is made, but can be changed under the Payment tab. This reason is used for some tracking reports. You can edit different reasons for reservations in the List Edit section.

Payment: this tab allows you to view and edit payments assigned to the selected reservation.



Custom: this tab allows you to add information specific to the selected reservation. Some examples might include a list of contacts for this reservation, airline information for this reservation, etc.



This information can then be printed in letters or used when searching on the Select Names Screen. In addition, you can edit the labels for these custom fields.

Additional Resources:
For more information about custom searches or other functionality of RezStream Professional, you may view our user manual from the following web page: http://www.rezstream.com/documentation_rezstream_professional.htm.

As always, RezStream support can be reached at 303-872-0220. Normal support hours are Monday through Friday, 8AM to 5PM, MST.