

S P R I N G E R - M I L L E R SYSTEMS



# Redesigned Owner Contract Screens

SMS | Host 2022r1

Enhancements to the Owner Contract screens introduced in <sup>SMS</sup> | Host 2022r1

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# Introduction

In the <sup>SMS</sup>|Host 2022r1 release, the Owner Contract has received a makeover for the purpose of streamlining the existing functionality to be more intuitive to use and easier to train.

While there are multiple enhancements as described below, the primary thing you will notice is the appearance. Certain features that are not enabled at your property will no longer be displayed meaning it will not be necessary to work around them. For properties that use our Owner Activity functionality, there will be additional tabs and buttons providing the features with which you are familiar while those that are not configured for it will not see them.

The graphic standards that have previously been applied to the Guest Tile, Reservations, City Ledger and Membership accounts have been employed for the arrangement of fields and the coloration of the Contract. Related fields have been placed into labeled sections and several buttons, previously located on a large button-bar at the bottom of the screen, have been embedded into the sections where they would apply. The number of tabs has been reduced from ten to four for most properties though the actual number will depend on your <sup>SMS</sup> [Host system configuration.

Most of what you see will be familiar though it may have been relocated or, in a few instances, retitled to be more easily understood. Mixed in are a few enhancements that we believe will benefit everyone.

5 Owner Contract									
10000A:OWN			Co-Ow	ner Po	ting Contro	ls Inventory	Notes/Other		
SAndy Enterprises			Primary	Add Guest	Co-Owne	er Ren	First	ər	^
er indy Enterprises				100006	Adair		Andy		
Contract Description			Primary	10001M	Baptista		Susan		
			<u> </u>				_		
C <u>h</u> ange Name <u>R</u> esale									
Contract Info							-		<b>~</b>
Contract Info				Andy A 1838 G	dair oodwin Av				Primary Owner
Contract Type 001 - NEW				#2	oouwiii Av	ionuo			T fillery Owner
				Trout L	ake, WA 9	98650			PDS @
Product Whole Ownership - Que	een			US					
Purchased 06/29/2023				509-39	5-7717				
			a	Antonic	AAdair@	davren com			
Sell / End Contract §				/ unconne		adyrop.com			
				. Ir				En	nail Statements 8
Folio Balances					Jiype	N.C.			
1.0 Eolio Bolonoo		00.40			lax ID#	view			mail Invoices 9
1-9 Tolio Dalance	-1	96.10	Ta	Repr	ortina		Receives		
Maintenance Balance		0.00		1000	0 104	12			
Escrow Balance	-5	45.73			o i o		Letter	Statemer	nt 🗌 Check
				VV-0 Re	ceiveu				
<u>B</u> ills <u>E</u> olio	Recalcula	te <u>+</u>	Pe	rmit			Statement	Preference	
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View Statement View Invoice	Hold Paym	ent !		воок			CEntai	OTHIN	OTORA
			_	_	_	_	_		
Add Contract	Lock \	More <u>N</u> o	otes	Ŀ	etters	Work Ord	er <u>7</u>		
<u>S</u> can Escape <u>E</u> dit	Merge D	Edits :	<u>~</u>	(	<u>è</u> uest				

# Summary of 2022r1 Enhancements

#### **Contract Legal Name**

10000A:OWN	
SAndy Enterprises	
Contract Description	
Change Name	

The button (User Clearance required) to change the Legal Name on a Contract has been relocated within this area.

## **Contract Info**

Contract Info
Contract Type 001  VEW
Product Whole Ownership - King
Purchased 03/01/2023
Prior Contract 100002 Adair, Andy
Date Sold 08/31/2023 🖬 Thursday
Sold To 100030 Garcia, Delma
Sell / End Contract <u>\$</u>

Purchase and Sales links have been enhanced with the prior Owner's Contract number (Andy) and the new Owner's Contract number (Delma) have been converted to buttons to provide direct access to those contracts. These fields only appear when a contract has been bought from and/or sold to another owner.

The <Sell / End Contract> button is a new feature that brings together the various actions that can be applied to the ownership of a Contract at the time the button is pressed.

## Sell / End Contract

Sell / Er	nd Contract Methods
Sell	End this contract and move the inventory to a different guest.
Reissue	End this contract and replace it with a new contract using the same inventory and posting controls for one of the current owners.
Close Contract	Close this contract and return the inventory to being available for sale.
Cancel Contract	Change the level of the contract to canceled and return the inventory to being available for sale.
	C Escape

Each of these actions will only appear if they can be performed:

- Sell An OWN level Contract can always be sold to another Owner but the button will not appear otherwise.
- Reissue This concept streamlines the previous process of ending an OWN level Contract in order to resell it to
  one or more of the same Co-Owners as a result of altering the revenue payment terms. For properties in the
  United States, this step is now required for changing the Check recipient or altering the split percentage when
  Co-Owner payments is enabled if the recipients have previously received payments.
- Close Contract This one function replaces the previous options to Foreclose (FRC), Rewrite (REW) or Upgrade (UPG) an OWN level Contract whereby the linked Token(s) are removed and ownership is terminated. The level of the Contract will become CLS.

<u>Note</u>: when Closing a Contract, there is now an option to require a Reason Code, a freeform Text Reason, both or neither. This setting is in *Setup / Installation*  $\rightarrow$  *Miscellaneous Rates and Defaults*  $\rightarrow$  *Owner Accounting Settings 3* (char menu path F-L-R-3). The Reason Codes are configured under visual Configuration  $\rightarrow$  *Miscellaneous Files and Codes*  $\rightarrow$  *Owners.* 

• **Cancel** – This option is used to indicate that a Contract has been created by mistake. It is only available as long as there are no historical transactions on the folio.

## **Folio Balances**

Folio Balances		
	1-9 Folio Balance	945.00
	Maintenance Balance	1,050.00
	Escrow Balance	-582.25
Bills	<u>F</u> olio	Recalculate <u>+</u>
View Statement	View Invoice	Hold Payment <u>I</u>

In addition to the various Owner Folio balances (the Maintenance and Escrow only appear if they are enabled), several buttons have been relocated into this section.

Three things to note:

- The <View Statement> button is only present if PDF archiving is enabled.
- The <View Invoice> button is only present if the <sup>SMS</sup> | Work Order and Guest Request module is installed.
- The <Hold Payment> button, previously labeled as "Mgr Clr" for Manager Clearance, has been renamed and toggles between "Hold" and "Approve" Payment to disable or enable receipt of payments for the Contract.

#### **Co-Owner Tab**

Co-Owner Posting Controls Inventory	Notes/Other			
Add Co-Owner Rem	nove Co-Owner			
Primary Guest Last	First			•
100006 Adair	Andy			
Primary 10001M Baptista	Susan			
			_	
			_	
Curan Dentista			_	•
Susan Baplista			Dri	mony Owner
Denver CO 80202			PII	mary Owner
720-201-6769				PDS
120 201 0100				
@ SusanBBaptista@example.cor	n			
ID Type SS 👻	Social Security	·	Email S	Statements 8
T ID// Minu ****	*****	1 -		1
Tax ID# View			Email	Invoices 9
Tax Poparting	Pagaivag			
Tax Reporting	Receives			
● 1099 ○ 1042			aant	Chook
UW-8 Received			lent	M CHECK
Permit	Statement P	reference	•	
	○ Email			Portal
⊠ Book		OFIN		Tona

While this tab has been reorganized to better present the features with which you are already familiar, there are several exciting enhancements:

- Buttons have been incorporated on the tab to easily Add or Remove Co-Owners as may be requested by Owners. [Note that removing a Co-Owner that has previously received payments will require the Contract to be Reissued.)
- Three new radio buttons have been added in the Receives section to identify a statement delivery preference for each Co-Owner that is flagged to receive a statement:
  - Email this refers to an email with a statement attachment
  - **Print** these Co-Owners prefer to receive a physical copy of their statement in the mail
  - Portal this indicates a preference to receive an email with a link to the WorldNXT Owner Portal when statements are published. This option will only be enabled when the Portal is installed. A new flag located under Setup / Installation → Miscellaneous Rates and Defaults → Owner Accounting Settings 4 (char menu path F-L-R-4).

## Is Portal a valid Statement Preference Option (Y)es/(N)o ? 🏾

Note: These same preferences will apply to Owner's Work Order Invoices if that <sup>SMS</sup> | Host module is installed.

As described in the Release Guide, these preferences are referenced by the new Printing and Emailing features within the Statement and Invoice Management functions (from the Owner Management menu). HTML templates for the Email and Portal communications are distributed with this release. These must be configured and added to your Correspondence options.

• Two additional buttons are now located above the Receives section for emailing Owner Statement or Work Order Invoice attachments on-demand when they are stored in a Contract's archives. These, too, require the new templates to be configured in Correspondence.

For properties with split Co-Owner payments enabled, an <Edit Split %> button is positioned at the top of the tab. As a reminder for U.S. properties, changing a split percentage when payments have previously been posted requires the Contract to be Reissued.

Co-Ow	ner Posting Co	ontrols	entory Notes/Other		
[	Add Co-C	)wner	Remove Co-Owner	Edit Split %	
Primary	Guest	Split %	Last	First	^
Primary	/ 1000DV	50.0	0 Higgins	Ben	
	1000DX	50.0	0 Hill	Shane	

## **Posting Controls**



While this newly named tab consolidates familiar controls into a single space, there is an exciting enhancement. Charge Codes, which have previously been limited to three undefined letters, have become defined single-character codes (A-Z) and up to eight of them can be added to a Contract from a picklist. They are configured under visual *Configuration*  $\rightarrow$  *Miscellaneous Files and Codes*  $\rightarrow$  *Owners*. The update process will map each of the codes you have in use today to the appropriate letter after which you can edit the description to reflect their meaning to your operation. Note that any non-letter codes that have been used in the past will be mapped to unused letters and will be identified by their description.

Additionally, you can now create default settings for the following four fields which will be used to populate newly created Contracts:



These settings are in Setup / Installation  $\rightarrow$  Miscellaneous Rates and Defaults  $\rightarrow$  Owner Accounting Settings 3 (char menu path F-L-R-3).

#### Inventory

Though the contents of this tab will all be familiar, please note that the Purchase Close Date will now default to the Purchased date of the Contract though it can be edited to a later date.

#### **Notes/Other**

Co-Owner	Posting Controls	Inventory	Notes/Other		
	Expiration Transfer Date	/ /			
	Transfer #				
	Exchange #				
	Reference				
	Notes				
Notes					
					^

While the *Notes* portion of this tab remains a freeform memo field, the six fields above it are new for <sup>SMS</sup> | Host. These fields – two dates, two numbers and two short notes – have been relocated from their original position on the left-hand side of the Contract. Though several of these fields have functions under specific configurations, many properties have used them for their own purposes despite what the labels indicate. If you have been using them, then their contents will continue to display in this new location. However, there is now a configuration screen enabling you to change the labels to fit your use.

Note lab, Note 1 : Reference Note Tab, Note 2 : Notes	Owner Contract Note Tab, Note Tab, Note Tab, Note Tab, Note Tab, Note Tab,	labels: Date 1 Date 2 Number 1 Number 2 Note 1 Note 2		Expiration Transfer Date Transfer # Exchange # Reference Notes	
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These settings are located under Setup / Installation  $\rightarrow$  Miscellaneous Rates and Defaults  $\rightarrow$  Owner Accounting Settings 4 (char menu path F-L-R-4).

#### **General Contract Behavior**

Several additional configuration settings will enable you to further customize your Owner Contact experience:

- For those who do not use Resale Listings, access can be removed from both the Contract and the Owner Management menu
- Most exciting of all is a new feature that will enable a Contract to be automatically created with a level of OWN without having to step through the sequence of levels from PND to SUS to OWN.

Enable Owner Accounting Resale Listing (Y/N) N Replace the PND, SUS, OWN sequence with direct to OWN for New Contracts (Y/N) Y

These settings are located under Setup / Installation  $\rightarrow$  Miscellaneous Rates and Defaults  $\rightarrow$  Owner Accounting Settings 3 (char menu path F-L-R-3).