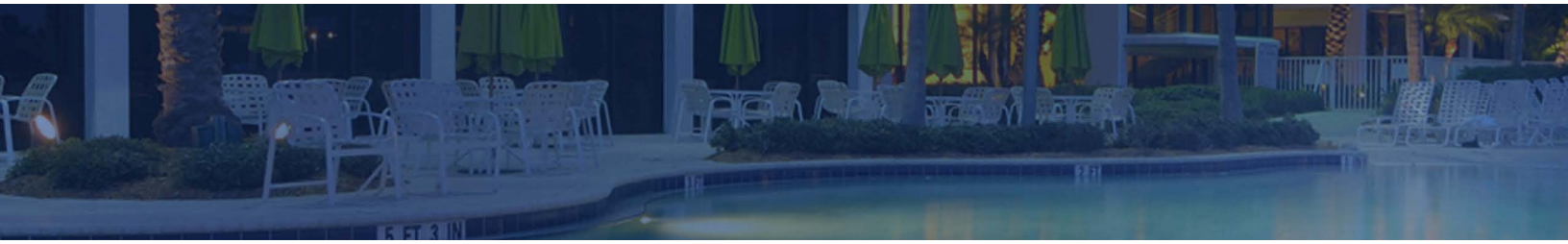
SMS™

SPRINGER-MILLER SYSTEMS



Redesigned Owner Contract Screens

SMS|Host 2022r1

Enhancements to the Owner Contract screens introduced in SMS|Host 2022r1

SMS Document # 1021110, Rev. 1.0

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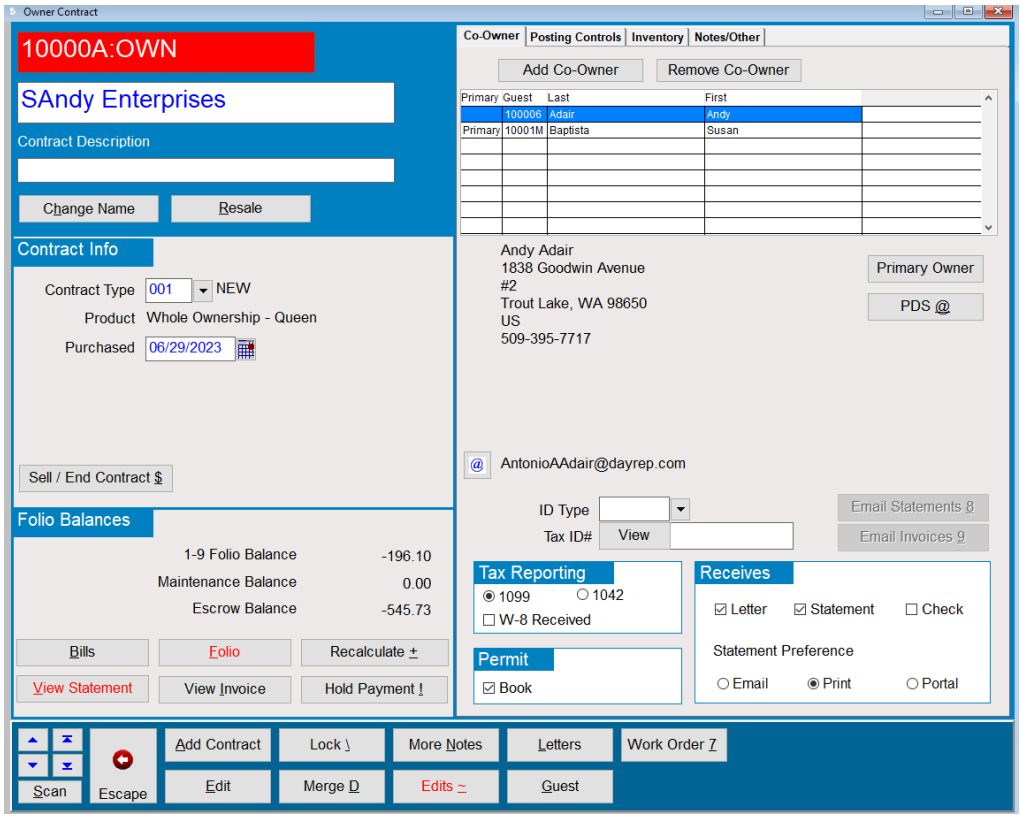
Introduction

In the SMS|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 SMS|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.



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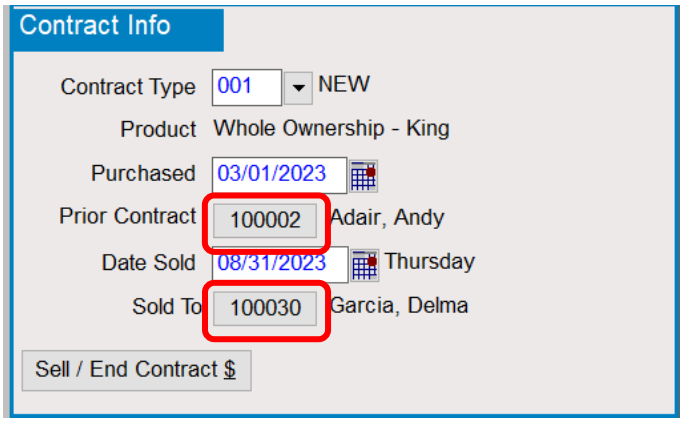
Summary of 2022r1 Enhancements

Contract Legal Name

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

Contract Info



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.

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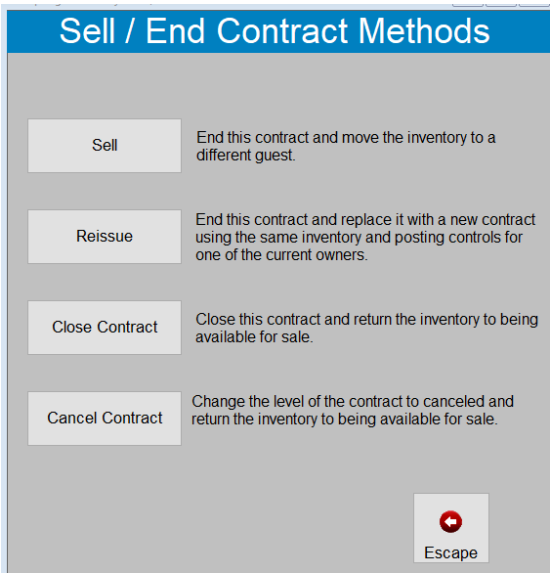
Sell / End Contract



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**.

  Note: 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 → Miscellaneous Rates and Defaults → Owner Accounting Settings 3* (char menu path F-L-R-3). The Reason Codes are configured under visual *Configuration → Miscellaneous Files and Codes → 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.

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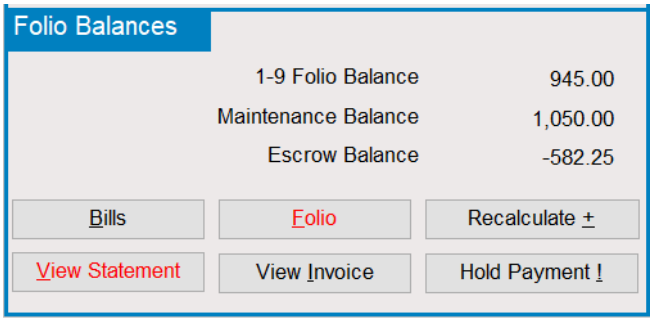
Folio Balances



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 SMS|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.

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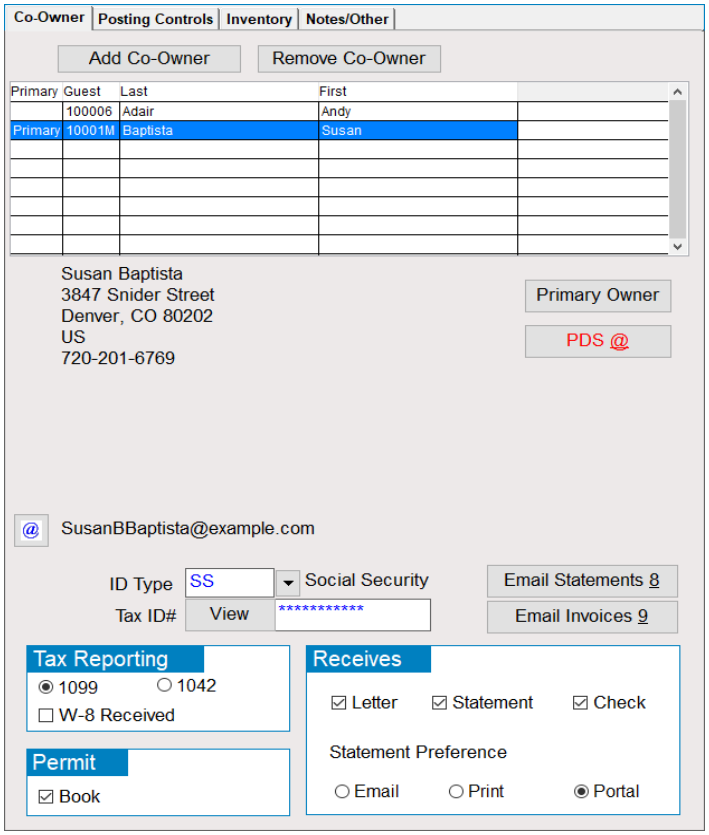
Co-Owner Tab



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).

***Note**: These same preferences will apply to Owner's Work Order Invoices if that SMS|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.

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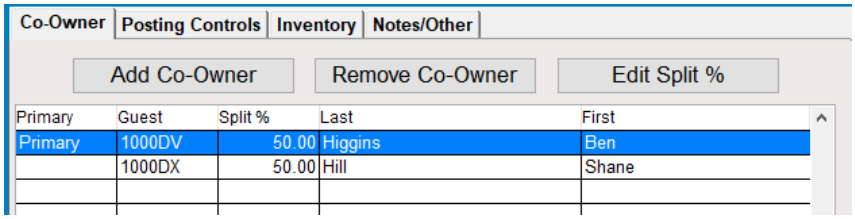
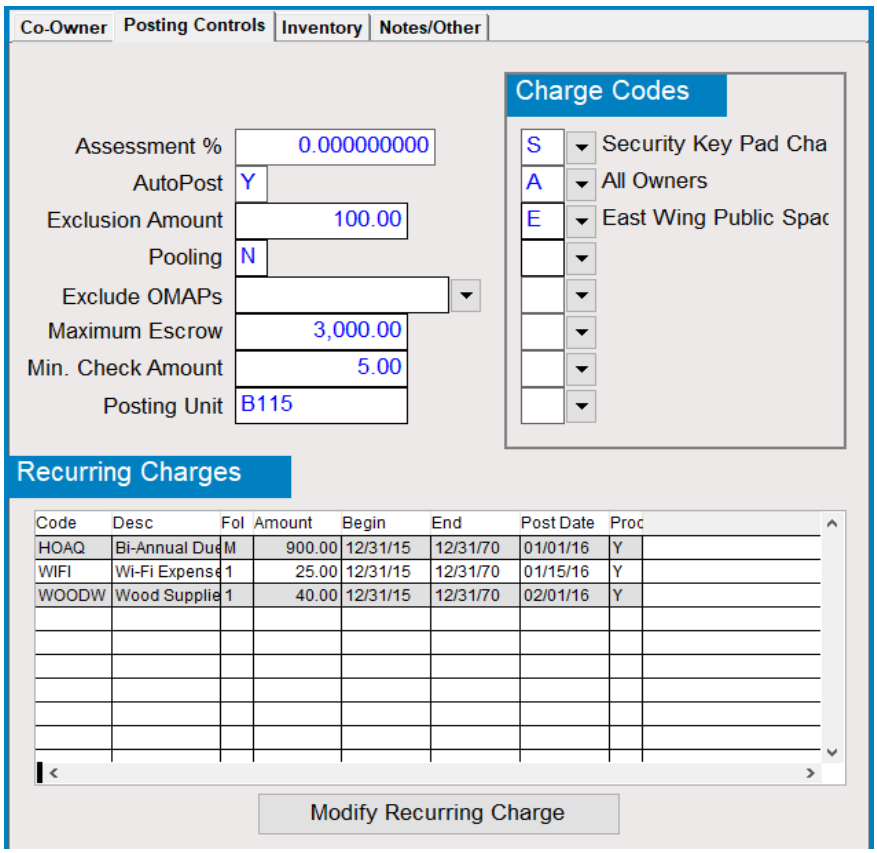
- Two additional buttons are now located above the Receives section for emailing Owner Statement or Work Order Invoice attachments on-demand when they are stored in a Contract's archives. These, too, require the new templates to be configured in Correspondence.

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.



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* → *Miscellaneous Files and Codes* → *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.

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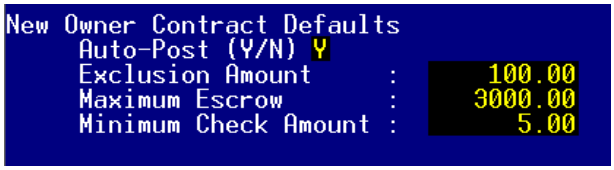
Additionally, you can now create default settings for the following four fields which will be used to populate newly created Contracts:

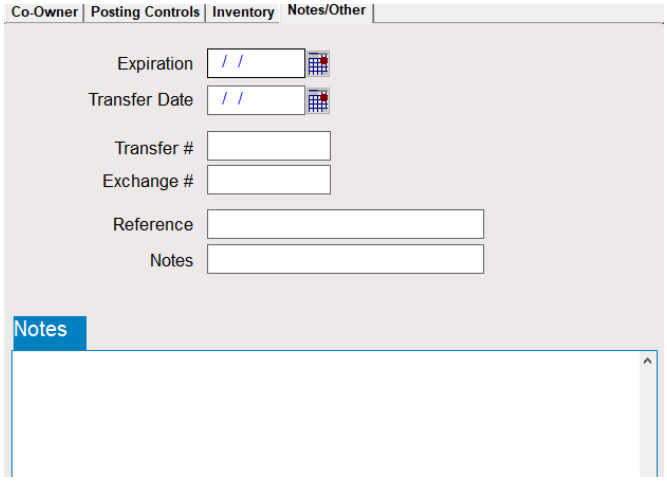


These settings are in *Setup / Installation → Miscellaneous Rates and Defaults → Owner Accounting Settings 3* (char menu path F-L-R-3).

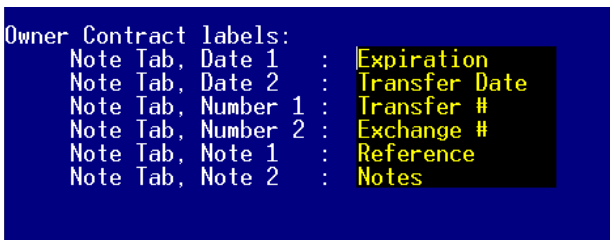
Inventory

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



While the *Notes* portion of this tab remains a freeform memo field, the six fields above it are new for SMS|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.



These settings are located under *Setup / Installation → Miscellaneous Rates and Defaults → Owner Accounting Settings 4* (char menu path F-L-R-4).

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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.

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

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