

Golf Escapes

Golf Trips made easy!

Arizona Golf Trails offers custom golf packages to the southwest and Rocky Mountain destinations. In support of this business, the “Golf Escapes” golf trip management system has been developed to manage the end to end customer experience for golf groups, including customer interactions, quotes, itineraries, vouchers, tee times, hotel and car rental reservations, and payment tracking.

Custom branding and color palettes are available to all subscribers. In addition, quote, itinerary and voucher templates can be used as is or customized to meet your specifications.

This document provides a highlight of the features of this system as well as a glimpse into the product direction.



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Arizona Golf Trails

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Dashboard

Arizona Golf Trails

AGT LIVE for the year: 2016 2017 2018 **2019** 2020

Overseeding Report

YTD Sales: \$1,234,567
 YTD CGS: \$234,567
 YTD Rounds: 123
 YTD Room Nights: 456

58 Groups | 112 Quotes | 0 Invoices | 353 Rates | 190 Vendors

Name	Mobile Phone	Pipeline	Pipeline Reason	Pipeline Due	Destination	# Players	Arrival Date	Departure Date	LOG
...	...	Lead	Awaiting 1st Contact	Thu, Mar 14, 2019	Sedona, Payson,	2	Sat, Feb 1, 2020	Sat, Feb 8, 2020	LOG
...	...	Create Proposal	Awaiting Details	Thu, Mar 14, 2019	Phoenix / Scottsdale	4	Thu, Apr 25, 2019	Sun, Apr 28, 2019	LOG
...	...	Create Proposal	Creating Proposal	Mon, Mar 11, 2019	Mesquite, NV / St.	2	Tue, May 14, 2019	Fri, May 17, 2019	LOG
...	...	Create Proposal	Creating Proposal	Fri, Mar 15, 2019	Colorado	8	Sun, Aug 18, 2019	Sat, Aug 24, 2019	LOG
...	...	Create Proposal	Creating Proposal	Fri, Jan 18, 2019	Tucson	8	Wed, Feb 19, 2020	Sun, Feb 23, 2020	LOG
...	...	Create Proposal	Awaiting Details	Thu, Mar 14, 2019	Bucket List	12	Tue, Sep 22, 2020	Tue, Sep 29, 2020	LOG
...	...	Won	Solicit Feedback	Sun, Mar 3, 2019	Phoenix / Scottsdale	5	Sun, Mar 3, 2019	Thu, Mar 7, 2019	LOG
...	...	Won	Solicit Feedback	Fri, Mar 8, 2019	Phoenix / Scottsdale	3	Fri, Mar 8, 2019	Mon, Mar 11, 2019	LOG
...	...	Won	GOLFING!	Mon, Mar 4, 2019	Phoenix / Scottsdale	2	Mon, Mar 11, 2019	Thu, Mar 14, 2019	LOG
...	...	Won	Final Payments Due	Tue, Mar 12, 2019	Mesquite, NV / St.	4	Mon, Apr 1, 2019	Tue, Apr 30, 2019	LOG
...	...	Won	Final Payments Due	Mon, Apr 22, 2019	Mesquite, NV / St.	8	Wed, May 22,	Sun, May 26, 2019	LOG
...	...	Proposal Out	Group is Reviewing	Fri, Mar 15, 2019	Phoenix / Scottsdale	4	Wed, Apr 24, 2019	Sun, Apr 28, 2019	LOG
...	...	Proposal Out	Group is Reviewing	Sat, Feb 23, 2019	Phoenix / Scottsdale	7	Thu, Apr 25, 2019	Sat, Apr 27, 2019	LOG
...	...	Proposal Out	Group is Reviewing	Fri, Feb 22, 2019	Carolinas	12	Sun, Sep 8, 2019	Fri, Sep 13, 2019	LOG

+ New Customer

Dashboard Benefits

- Current “pipeline” view of groups
- Call to action highlights
- Customer service log
- Analytics – YTD Sales, Tee Times and Room nights



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Customer Profile

The screenshot shows a web-based customer profile interface. At the top, there is a navigation bar with tabs for Dashboard, Customers, Estimates, Invoices, Rates, Vendors, Car Rentals, and Resource Scheduling. Below this is a 'Customer List' header.

The main content area is split into three columns:

- Left Column (Customer Details):** Contains fields for Customer No (2404), Group ID (9), and Year (2019). It includes sections for 'Trail Boss' (Yes/No), 'Home Email', 'Phone', 'Package Interest' (Phoenix / Scottsdale), 'Trail Region' (Phoenix / Scottsdale), 'Travel Dates' (Sun, Mar 3, 2019; Thu, Mar 7, 2019), 'Est Golfers' (5) and 'Rounds' (6), 'Preferred Tee Time', 'Trip Type' (Buddy Trip), 'Est Guests' (5) and 'Nights' (4), 'Lodging' (Casita), 'Beds K/Q' (K/Q, T/F, T/F), 'Car Region' (Arizona), 'Car Type' (MVAR - Minivan), 'Pipeline' (Won), 'Pipeline Due' (Sun, Mar 3, 2019), and 'Contact Date' (Mon, Jan 28, 2019). There is also a 'Mailing Address' section with input fields for address, city, state, and zip.
- Center Column (Estimates and Proposals):** Shows '4 Estimates', 'Past Trips', and '0 Invoices'. It features two tables:
 - Accepted:** A table with columns 'Arrival Date', 'Grand Total', 'Status', 'Follow Up', and 'Summary'. It lists one entry: 'Phoenix / Scottsdale Golf Trip - 4' on 3/3/2019 with a grand total of \$1,584.51, status 'Accepted', and follow-up on Jan 10, 2019.
 - Proposals:** A table with columns 'Arrival', 'Departure', 'Grand Total', and 'Created'. It lists three entries:
 - Phoenix / Scottsdale Golf Trip - Meridian CondoResorts: 3/3/2019 - 3/7/2019, \$1,648.96, 1/10/2019
 - Scottsdale Golf Trip: 3/3/2019 - 3/7/2019, \$1,975.24, 1/5/2019
 - Phoenix / Scottsdale Golf Trip - Scottsdale Links: 3/3/2019 - 3/7/2019, \$1,859.07, 1/5/2019
- Right Column (Activity Log):** Features buttons for 'LMTC', 'Followup eMail', 'Intro Email', and 'Feedback Email'. Below is an 'Activity Log' table with columns for date, user, and message. It lists several events from 3/7/2019 back to 2/21/2019, such as 'Next Normal advised that the guy in the pro shop for Meridian was charged too much, so he'll credit us on the Rollie' and 'Confirmation eMail sent to Meridian CondoResorts'.

Customer Profile

- Customer name and details
- Trip details
- Referral source
- Pipeline status
- Group member tracking
- Customer service log with automatic update for key milestones
- Automated Intro and Feedback eMails – just “Click and Send”
- Custom email templates
- Quotes presented and accepted, as well as quotes and trips from years past



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Quote Generator

Quote Generator – “Sandbox”

- Generates one or more quotes for a customer
- Dynamically builds calendar itinerary as items are added to package
- Easy “picklist” approach to add golf, lodging and car rental items
- Tracks bookings – tee times, hotel, car and activity reservations
- Highlights missing elements and exceptions; i.e., check in date doesn’t match arrival date
- Summary of cost and sales pricing by line item and group
- Allows line item and/or package pricing adjustments - premiums or discounts
- Provides ability to duplicate packages for this or other customers to minimize redo
- Presents quotes and itineraries in multiple, customizable formats
- Print, save as PDF, and eMail Quotes, Itineraries, and Vouchers
- Automatic eMail generation to request and confirm reservations, tee times, etc...
- Provides customer, job, item, and estimate details for easy entry into Quickbooks
- Automated interface to Quickbooks for customers, jobs, estimates, sales orders, invoices and purchase orders (future feature)



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Vendor Management

Dashboard Customers Estimates Invoices Rates Vendors Car Rentals Resource Scheduling

Introduction Request Rates

Gold Canyon Golf Resort (Golf)

22 Vendor Name: Gold Canyon Golf Resort (Golf)

Vendor Pic: 

Trail Name: Gold Mine Golf Trail

Trail URL: www.arizonagolftrails.com/gold-mine-golf-trail

Region: Phoenix / Scottsdale

Home Page: www.gcgr.com

Vendor Address: Street Address, City, State, Zip Code

Booking Instructions:

- Reservations can be made up to **90** days in advance.
- Phone ☎ or Fax ☎
- Andy - off Tues and Wed?

Vendor Short Description: The Dinosaur Mountain golf course has consistently been rated one of the top courses in Arizona. The scenery, dramatic elevation changes, abundant wildlife and exhilarating views all make for a memorable golfing experience. Matched with the same great golf course conditioning is Sidewinder, rated 4 Stars by Golf Digest. Sidewinder leads golfers through desert arroyos and native desert washes.

Cancellation Policy: Cancellation policy: 1- 11 players (72 hours), 12 - 24 players (1 week), Over 25 players (4 weeks). If reservations are not cancelled within this time frame, full charges will apply.

Buttons: Add Vendor, Search Vendors, Next Vendor, Show All, Rates

Creation Date: 12/4/2016 8:36 PM Modified Date: 3/8/2019 8:33:23 PM Modified By:

Billing Vendor: Gold Canyon Golf Resort

All-in Rate? Yes No CC on File: 8263 07/19

Private? Yes No Rates Thru: Aug 29, 2019

Vendor Tax Rate: 7.2%

Default Mark Up %: 25%

Vendor City Land Use Fee (\$):

Vendor CWR Fee (%):

Tourney Event Fee:

Gratuity:

Primary Contact:

ProShop Phone:

Courses: Dinosaur Mountain, Sidewinder

Rate Ranges:

- Mon - Thu
- Fri - Sun
- All Days
- All Year Long
- Closed Overseeding

Rate TOD Ranges:

- Replay ESTIMATE
- All Day

SOLD TEE TIMES

CONFO	Date	Cost
014690	Thu, Feb 7, 2019	Dinosaur \$200.00
ITIN		Players @ \$100.00
014679	Mon, Feb 4, 2019	Sidewinder \$100.00
ITIN		Players @ \$50.00
013679	Mon, Feb 4, 2019	Dinosaur \$100.00
ITIN		Players @ \$50.00
013678	Sat, Feb 2, 2019	Dinosaur \$100.00
ITIN		4 Players @ \$25.00

Proposals Out

Proposal	Date	Cost
Proposal	5/17/19	Players @ \$90.00
Proposal	5/17/19	Players @ \$100.00
Proposal	5/17/19	Players @ \$100.00
Proposal	5/17/19	Players @ \$100.00
Proposal	4/25/19	Players @ \$30.00
Proposal	4/12/19	Players @ \$100.00
Proposal	3/25/19	Players @ \$100.00
Proposal	3/25/19	Players @ \$135.00

Vendor Management

- Vendor type and contact details
- Vendor specific rate calculation parameters (taxes, water/resource fees, resort fees, average markup, etc...)
- Booking instructions
- Brief description and picture for use in quotes and itineraries
- Cancellation policy
- Billing Vendor
- Analytics - YTD sales summary; outstanding and accepted bids



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Vendor Rates Summary

Item	VID	SID	PID	Preferred Vendor Billing Vendor	Type	Region	Season	Net Rate	Cost Price	Modified By	
Gold Canyon Golf Resort (Golf):Dinosaur Mountain:5/28/2019 - 8/29/2019: Mon - Thu - All Day:Gold Canyon Golf Resort	2018	5/28/2019	8/29/2019	22	31158	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 12/7/2018 11:41:04 AM
Gold Canyon Golf Resort (Golf):Dinosaur Mountain:5/28/2019 - 8/29/2019:Fri - Sun - All Day:Gold Canyon Golf Resort	2018	5/28/2019	8/29/2019	22	31159	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 12/7/2018 11:41:54 AM
Gold Canyon Golf Resort (Golf):Dinosaur Mountain:5/28/2019 - 8/29/2019:All Days - Replay:Gold Canyon Golf Resort	2018	5/28/2019	8/29/2019	22	31160	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 12/7/2018 11:42:38 AM
Gold Canyon Golf Resort (Golf):Sidewinder:5/28/2019 - 8/29/2019:Mon - Thu - All Day:Gold Canyon Golf Resort	2018	5/28/2019	8/29/2019	22	31174	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 1/21/2019 1:14:51 PM
Gold Canyon Golf Resort (Golf):Sidewinder:5/28/2019 - 8/29/2019:Fri - Sun - All Day:Gold Canyon Golf Resort	2018	5/28/2019	8/29/2019	22	31175	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 1/21/2019 1:14:51 PM
Gold Canyon Golf Resort (Golf):Sidewinder:5/28/2019 - 8/29/2019:All Days - Replay:Gold Canyon Golf Resort	2018	5/28/2019	8/29/2019	22	31176	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 1/21/2019 1:14:51 PM
Gold Canyon Golf Resort (Golf):Dinosaur Mountain:5/13/2019 - 5/27/2019: Mon - Thu - All Day:Gold Canyon Golf Resort	2018	5/13/2019	5/27/2019	22	31155	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 12/7/2018 11:39:17 AM
Gold Canyon Golf Resort (Golf):Dinosaur Mountain:5/13/2019 - 5/27/2019:Fri - Sun - All Day:Gold Canyon Golf Resort	2018	5/13/2019	5/27/2019	22	31156	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 12/7/2018 11:39:47 AM
Gold Canyon Golf Resort (Golf):Dinosaur Mountain:5/13/2019 - 5/27/2019:All Days - Replay:Gold Canyon Golf Resort	2018	5/13/2019	5/27/2019	22	31157	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 12/7/2018 11:40:23 AM
Gold Canyon Golf Resort (Golf):Sidewinder:5/13/2019 - 5/27/2019:Mon - Thu - All Day:Gold Canyon Golf Resort	2018	5/13/2019	5/27/2019	22	31171	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 1/21/2019 1:14:51 PM
Gold Canyon Golf Resort (Golf):Sidewinder:5/13/2019 - 5/27/2019:Fri - Sun - All Day:Gold Canyon Golf Resort	2018	5/13/2019	5/27/2019	22	31172	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin 1/21/2019 1:14:51 PM
Gold Canyon Golf Resort (Golf):Sidewinder:5/13/2019 - 5/27/2019:All Days - Replay:Gold Canyon Golf Resort	2018	5/13/2019	5/27/2019	22	31173	Gold Canyon Golf Resort Gold Canyon Golf	Golf	Phoenix /		Round	admin

Vendor Rates Summary

- Summary list of all rates entered for a specific vendor
- Ability to sort by rate name, modified date, effective date, vendor (if across multiple vendors), and category
- Ability to import and export rates
- Click on rate to view rate details



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Vendor Rates Detail

Dashboard
Customers
Estimates
Invoices
Rates

22
Gold Canyon Golf Resort (Golf)
Golf
2018

31152 Vendor Tax Rate Tourney Event Fee

Service All-in Rate? Yes No Trail Region Vendor CWR Fee

Vendor City Land Use Fee

Default Mark Up %

Add Rate

Delete Rate

Save Rate

Save Rate & Dupe

Save Dates & Dupe

All Rates

Return to Vendor

Preferred Vendor Billing Vendor

Eff Date Start Eff Date Stop Tax Inclusive Yes No

Course(s) Dinosaur Mountain Sidwinder

Rate Range / Unit of Measure All Days All Year Long Closed Overseeding Fri - Sun Mon - Thu

Rate TOD / Sub Range All Day ESTIMATE Replay

Rate Basis Net Public

Net Rate Rate Source

Cost Public Rate

Default Mark Up % "All-in" Rack Rate

Actual Mark Up % UM

MU Rate Price

Comments

Quickbooks Data

Vendor (Level 1)

Item Name (Level 2)

Effective Dates (Level 3)

Rate Type (Level 4)

Billing Vendor (Level 5)

COGS Account

Sales Account

Item

Sales Description

Purchase Description

Vendor Short Description



Vendor Rates Detail

- Rate details by vendor for auto calculation of net and total costs, rack and sales price
- Rate image and description for quotes and itineraries
- Quickly enter rates for same date ranges
- Billing vendor – track rates from different suppliers
- Auto create Quickbooks items detail
- Auto create of items in Quickbooks (Future feature)



Car Rentals

Car Types

Vendor: Enterprise, National, Alamo | 20 | Car

Season: Enterprise, National, Alamo | 20

SIPP Code: FVAR

Region: Arizona

Season: Value Normal High Peak

Car Type: FVAR - 15 PAX Van

Rate: UM: Day Week

Photo	Car Type	UM	Effective Start Date	Effective Stop Date	Net	Price	
	FVAR - 15 PAX	Day	1/1/17	1/10/17			View
	FVAR - 15 PAX	Week	1/1/17	1/10/17			View
	FVAR - 15 PAX	Day	4/5/17	7/12/17			View
	FVAR - 15 PAX	Week	4/5/17	7/12/17			View
	FVAR - 15 PAX	Day	8/20/17	9/5/17			View
	FVAR - 15 PAX	Week	8/20/17	9/5/17			View
	FVAR - 15 PAX	Day	9/24/17	10/4/17			View
	FVAR - 15 PAX	Week	9/24/17	10/4/17			View
	FVAR - 15 PAX	Day	10/22/17	11/1/17			View
	FVAR - 15 PAX	Week	10/22/17	11/1/17			View

Create Date: Modifier: admin

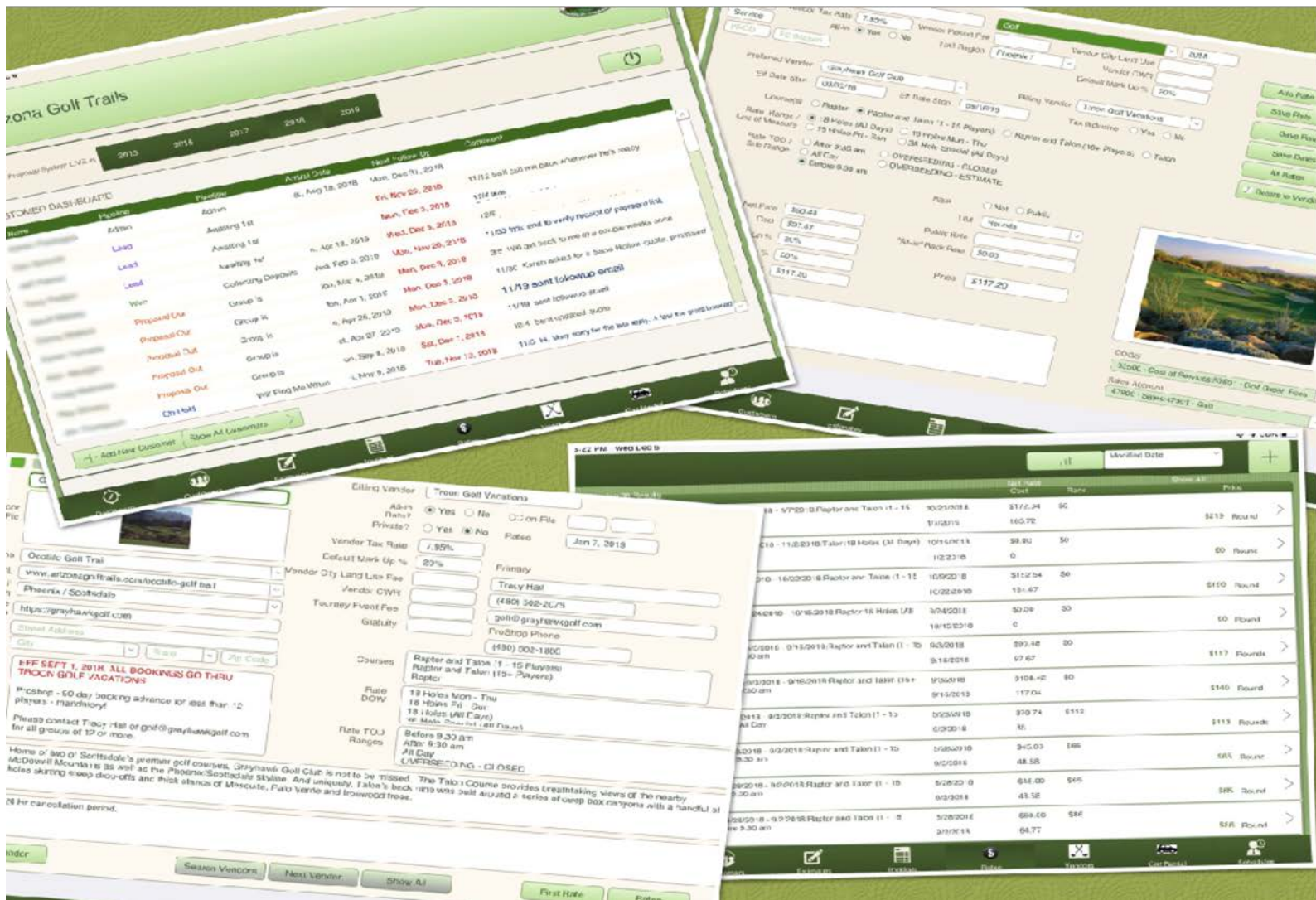
Car Type ID: 1 Modify Date: 1/9/2018

Car Rental Rates

- Car rentals available to sell for all users
- Manage wholesale car rental rates by year, region, and season (admins)
- Allows multiple rates for a car type
- Car image and description for quotes and itineraries
- Auto generation of car rental rate details based on wholesale rates from vendor (admins)



iPad Version



iPad Version

- Included with all subscriptions
- Includes all major functions from the desktop version
- Use anywhere you have a wifi connection
- Freedom to get out of the office while still running your business
- Same cloud based application as your desktop, so changes made are reflected immediately to all users



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Product Direction

Items in Development

- Report Module
 - Calendar view for groups
 - Calendar view for vendor closures or events
 - Integration to vendor systems for dynamic tee time and hotel rates
- Online implementation
 - ✓ Entire system is available over the web to your desktop, browser or iPad (done)
 - Self Service - website integration to allow groups to construct custom packages and pay online
- Quickbooks integration
 - ✓ Provide auto generation of customer, estimates, sales orders, invoices and purchase orders line item details for easy entry or export to Quickbooks (done)
 - Provide real time updates thru Quickbooks ODBC Driver

