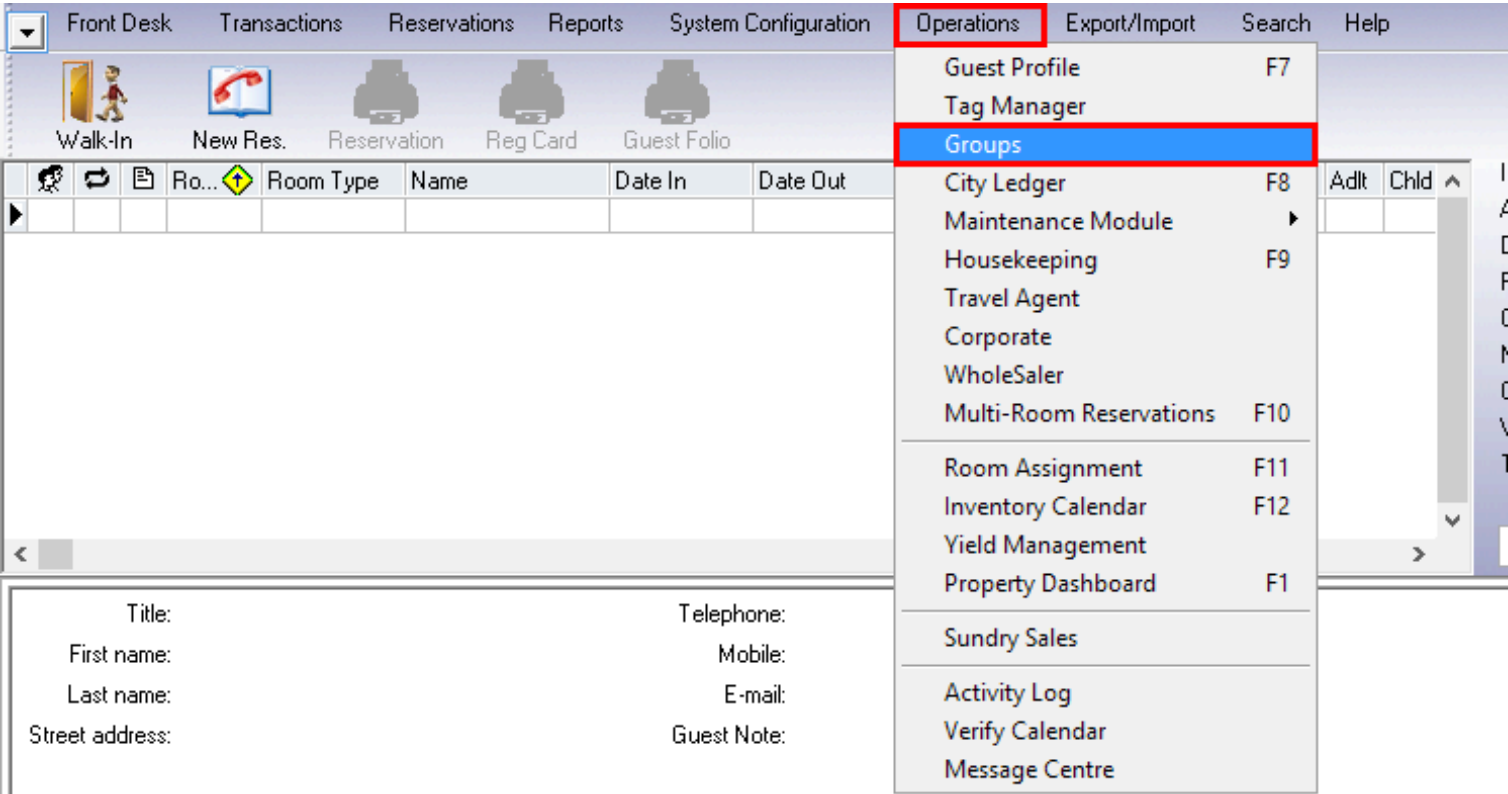


# How to Create a Tentative Group

Although there isn't a specific 'tentative' group setting for unconfirmed groups, you are able to create a group and block rooms within the group module if you would like to hold rooms for them.

The below article reviews how to add the group information and block rooms.

Go to **Operations > Groups** to open the Group Master.



To create a group click on the **New** button in the Group Master to open the Group Wizard.

View Reports

Name	Group ID	City Account	Arrival Date	Departure Date	Block Type	Cut-off Date	Tag Name
Apple Marketing Meeting	AMM120215	Apple	02-Dec-2015	05-Dec-2015	Solid	17-Nov-2015	
Corsair Yachts 30th Anniv	CYA111015		10-Nov-2015	13-Nov-2015	Solid	26-Oct-2015	
Mahogany Run PGA	MRPGA112515		25-Nov-2015	28-Nov-2015	Solid	05-Nov-2015	
Microsoft Autumn Retreat	MAR091415	Microsoft Corporatic	15-Sep-2015	22-Sep-2015	Solid	26-Aug-2015	
Microsoft Leadership Mee	MLM122215	Microsoft Corporatic	22-Dec-2015	29-Dec-2015	Solid	22-Dec-2015	
Smith / Jones Wedding	SJW111115		11-Nov-2015	13-Nov-2015	Solid	20-Oct-2015	

## Primary

1. Fill in the **General** tab of the **Primary** section. These can be updated at a later stage if needed
2. Note the tabs at the bottom of the window.

1. Primary 2. Rates 3. Block 4. Guest Services 5. Rooming List 6. Check-In 7. Check-Out 8. Notes

Name

Group ID  (A unique ID for your group)

Client type

Room Charge Code

Arrival Date  Nights

Departure Date  C/OTime

☐ Guests can arrive and depart outside of the block

Days Before  Days After

Active ☒

Cut-off Days

Cut-off Type

Block Type

Source of Business

Attach Note

General Contact & Billing Info Travel Agent

Post Cancel

Group:

- **Name** – the name of the Group. It is suggested that you differentiate this to show the group is tentative/unconfirmed Eg. TENT Smith group

- **Group ID** – this is a code that specific to this group. A group code can only be used once so it is important to make it unique to avoid errors when creating future groups for the same company. The suggested format is the initials of the group, followed by the arrival date. This code is mandatory should you wish for the group to be able to book reservations using the eRes Online Booking Engine.
- **Client Type** – select Client Type for this group.
- **Room Charge Code** – select Room Charge Transaction Code
- **Arrival Date** – select the group arrival date
- **Nights** – input the number of nights the group will be staying
- **Departure Date** - will auto populate after the Nights are selected
- **Guests can arrive and depart outside the block** – this section allows you to setup pre & post nights for the group. If you wish to enter pre or post nights, check this box and then enter the number of pre nights next to “Days Before” and the number of post nights next to “Days After”
- **Active** – check this box to make this Group active
- **Cut-off Days** – the number of days before the Arrival Date that you would like for the block to release
- **Cut-off Type** – select if the Group Block is to be released by Whole Block (the entire block will be released on the Cut off Date) or by One Day (the block will release one day at a time beginning with the first date set in the Cut off Date)
- **Block Type** – select if the Group Block will be Solid (the rooms are taken out of inventory) or Transparent (the rooms are not taken out of inventory)
- **Source of Business** – select the source of business from the pull down menu
- **Attach note** - this note will be placed on all picked up reservations under “Reservation Notes”. Typically this note is regarding billing instructions for the group, however you may also like to note here that the reservation is tentative/unconfirmed

1. Primary	2. Rates	3. Block	4. Guest Services	5. Rooming List	6. Check-In	7. Check-Out	8. Notes
<div> <div>Name</div> <div>Jones Family Reunion</div> </div> <div> <div>Group ID</div> <div>JFR102715</div> <div>(A unique ID for your group)</div> </div> <div> <div>Client type</div> <div>GRP CORP</div> </div> <div> <div>Room Charge Code</div> <div>RCH</div> </div> <div> <div>Arrival Date</div> <div>27-Oct-2015</div> <div>Nights</div> <div>2</div> </div> <div> <div>Departure Date</div> <div>29-Oct-2015</div> <div>C/OTime</div> <div></div> </div> <div> <div><input checked="" type="checkbox"/></div> <div>Guests can arrive and depart outside of the block</div> </div> <div> <div>1</div> <div>Days Before</div> <div>1</div> <div>Days After</div> </div> <div> <div>Active</div> <div><input checked="" type="checkbox"/></div> </div> <div> <div>Cut-off Days</div> <div>0</div> </div> <div> <div>Cut-off Type</div> <div>Whole Block</div> </div> <div> <div>Block Type</div> <div>Solid</div> </div> <div> <div>Source of Business</div> <div>Group</div> </div> <div> <div>Attach Note</div> <div>All charges to the individual.</div> </div>							
<div> <div>General</div> <div>Contact &amp; Billing Info</div> <div>Travel Agent</div> <div>Routing / Deposit</div> </div>							
<div>Group: Jones Family Reunion</div>							

## Contact & Billing Info

Fill in the **Contact & Billing Info** tab of the **Primary** screen. These can be updated at a later stage if needed

- **Folio Number** - Use the drop down menu next to "Folio number" to select folio number 1 for now
- **Address information** - fill in the contact information for this group

When finished, select the **Post** button in the bottom right hand corner of the screen.

1. **Primary** 2. Rates 3. Block 4. Guest Services 5. Rooming List 6. Check-In 7. Check-Out 8. Notes

Folio number 1 (Room and Tax Charges) ☐ Apply to existing reservations

☐ Bill to city account Bill To  ☐ Create new account

Credit limit ☐ Use account to fill up address

Address 716 Duncan Avenue Contact Jason Jones

Zip 10011 Phone 555-555-5555

City New York Email jason@thefamilyjones.com

Country United States Fax

State New York Tag

General **Contact & Billing Info** Travel Agent

**Post** Ca

Group: Jones Family Reunion

## Block

The next step is to input the Group Block, the rooms that are being held for this group to book.

In the block tab view, the following fields are viewable:

- **Room Type** - a list of your active Room Types
- **TOT** - total inventory for each Room Type
- **Avg Rate** - the Average Rate (based on the Group Rate attached to the group in the Rates tab)

Then, broken down by Group Dates (this includes pre/post nights)

- **INV** - Available Inventory for each Room Type on each date
- **BLK** - Group Block (this number will decrease as reservations are created)
- **PUP** - Rooms Picked Up (this number will increase as reservations are created)
- **REM** - Remaining Rooms in Block (BLK - PUP)

1. Primary
2. Rates
3. **Block**
4. Guest Services
5. Rooming List
6. Check-In
7. Check-Out
8. Notes

Display For  
2015-10-26
◀ Prev
Next ▶
Refresh
October
☐ REM
Block Holds

Room Type	TOT	Avg Rate	Mon Oct 26				Tue Oct 27				Wed Oct 28				TH	
			INV	BLK	PUP	RATE	INV	BLK	PUP	RATE	INV	BLK	PUP	RATE	INV	BLK
▶ CVK	20	\$95.00	17	0	0	\$100.00	17	0	0	\$90.00	17	0	0	\$90.00	17	0
CVQQ	20	\$95.00	20	0	0	\$100.00	20	0	0	\$90.00	20	0	0	\$90.00	20	0
OVK	20	\$195.00	19	0	0	\$200.00	19	0	0	\$190.00	19	0	0	\$190.00	19	0
OVQQ	20	\$195.00	20	0	0	\$200.00	20	0	0	\$190.00	20	0	0	\$190.00	20	0
OVSK	10	\$345.00	7	0	0	\$350.00	7	0	0	\$340.00	7	0	0	\$340.00	7	0
PS2B-K/QQ	2	\$2,095.00	2	0	0	\$2,100.00	2	0	0	\$2,090.00	2	0	0	\$2,090.00	2	0
			85	0	0		85	0	0		85	0	0		85	0

Edit Mode ☐
Enable overbooking ☐

Inventory
Group: Jones Family Reunion

## Edit Mode

To enter the Group Block, check **Edit Mode** located in the bottom left hand corner of the screen.

1. Primary
2. Rates
3. **Block**
4. Guest Services
5. Rooming List
6. Check-In
7. Check-Out
8. Notes

Display For  
26-Oct-2015
◀ Prev
Next ▶
Refresh
October
☐ REM
Block Holds

Room Type	TOT	Avg Rate	Mon Oct 26				Tue Oct 27				Wed Oct 28				TH	
			INV	BLK	PUP	RATE	INV	BLK	PUP	RATE	INV	BLK	PUP	RATE	INV	BLK
▶ CVK	20	\$95.00	17	0	0	\$100.00	17	0	0	\$90.00	17	0	0	\$90.00	17	0
CVQQ	20	\$95.00	20	0	0	\$100.00	20	0	0	\$90.00	20	0	0	\$90.00	20	0
OVK	20	\$195.00	19	0	0	\$200.00	19	0	0	\$190.00	19	0	0	\$190.00	19	0
OVQQ	20	\$195.00	20	0	0	\$200.00	20	0	0	\$190.00	20	0	0	\$190.00	20	0
OVSK	10	\$345.00	7	0	0	\$350.00	7	0	0	\$340.00	7	0	0	\$340.00	7	0
PS2B-K/QQ	2	\$2,095.00	2	0	0	\$2,100.00	2	0	0	\$2,090.00	2	0	0	\$2,090.00	2	0
			85	0	0		85	0	0		85	0	0		85	0

Edit Mode ☐
Enable overbooking ☐

Inventory
Group: Jones Family Reunion

## Entering the Block

Proceed to enter Group Block holds under the **BLK** column for Group Dates (including any pre/post nights). Once Group Block has been entered, select **Post** to save.

In the example below, Monday, October 26 & Thursday, October 29th are the Pre & Post nights, respectively. In many situations a property may decide to not hold rooms on the Pre & Post nights as there is often no guaranteed pickup for those nights. Instead they may decide to only hold rooms on the nights of the actual group block.

1. Primary
2. Rates
3. **Block**
4. Guest Services
5. Rooming List
6. Check-In
7. Check-Out
8. Notes

Display For  
26-Oct-2015
Prev
Next
Refresh
October
☒ REM
Block Holds

Room Type	TOT	Avg Rate	Mon Oct 26					Tue Oct 27					Wed Oct 28					T	
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE		
▶ CVK	20	\$95.00	17	0	0	0	\$100.00	17	0	0	0	\$90.00	17	0	0	0	\$90.00	17	0
CVQQ	20	\$95.00	20	0	0	0	\$100.00	20	5	0	0	\$90.00	20	5	0	0	\$90.00	20	0
OVK	20	\$195.00	19	0	0	0	\$200.00	19	6	0	0	\$190.00	19	6	0	0	\$190.00	19	0
OVQQ	20	\$195.00	20	0	0	0	\$200.00	20	4	0	0	\$190.00	20	4	0	0	\$190.00	20	0
OVSK	10	\$345.00	7	0	0	0	\$350.00	7	0	0	0	\$340.00	7	0	0	0	\$340.00	7	0
PS2B-K/QQ	2	\$2,095.00	2	0	0	0	\$2,100.00	2	0	0	0	\$2,090.00	2	0	0	0	\$2,090.00	2	0
			85	0	0	0		85	0	0	0		85	0	0	0		85	0

Enable overbooking ☐

Inventory

Group: Jones Family Reunion

## Checking the Totals

Once the block numbers have been entered and saved, we will now see updated block totals at the bottom of the column for each day.

1. Primary
2. Rates
3. **Block**
4. Guest Services
5. Rooming List
6. Check-In
7. Check-Out
8. Notes

Display For  
26-Oct-2015
Prev
Next
Refresh
October
☒ REM
Block Holds

Room Type	TOT	Avg Rate	Mon Oct 26					Tue Oct 27					Wed Oct 28					T	
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE		
▶ CVK	20	\$95.00	17	0	0	0	\$100.00	17	0	0	0	\$90.00	17	0	0	0	\$90.00	17	0
CVQQ	20	\$95.00	20	0	0	0	\$100.00	15	5	0	5	\$90.00	15	5	0	5	\$90.00	20	0
OVK	20	\$195.00	19	0	0	0	\$200.00	13	6	0	6	\$190.00	13	6	0	6	\$190.00	19	0
OVQQ	20	\$195.00	20	0	0	0	\$200.00	16	4	0	4	\$190.00	16	4	0	4	\$190.00	20	0
OVSK	10	\$345.00	7	0	0	0	\$350.00	7	0	0	0	\$340.00	7	0	0	0	\$340.00	7	0
PS2B-K/QQ	2	\$2,095.00	2	0	0	0	\$2,100.00	2	0	0	0	\$2,090.00	2	0	0	0	\$2,090.00	2	0
			85	0	0	0		70	15	0	15		70	15	0	15		85	0

Edit Mode ☐
Enable overbooking ☐

Inventory

Group: Jones Family Reunion

The tentative group is now complete.

**Note:** It is important that tentative groups are kept up to date:

If the group does not go ahead, the group will need to be [canceled](#) to ensure that it is no longer holding inventory

If the group goes ahead, the group will need to be updated and completed correctly based on it's specific requirements:

- [How to create an Individual Pay Group](#)
- [How to create a Group with Billing to a City Ledger Account](#)
- [How to Create a Group with Billing to a House Account](#)