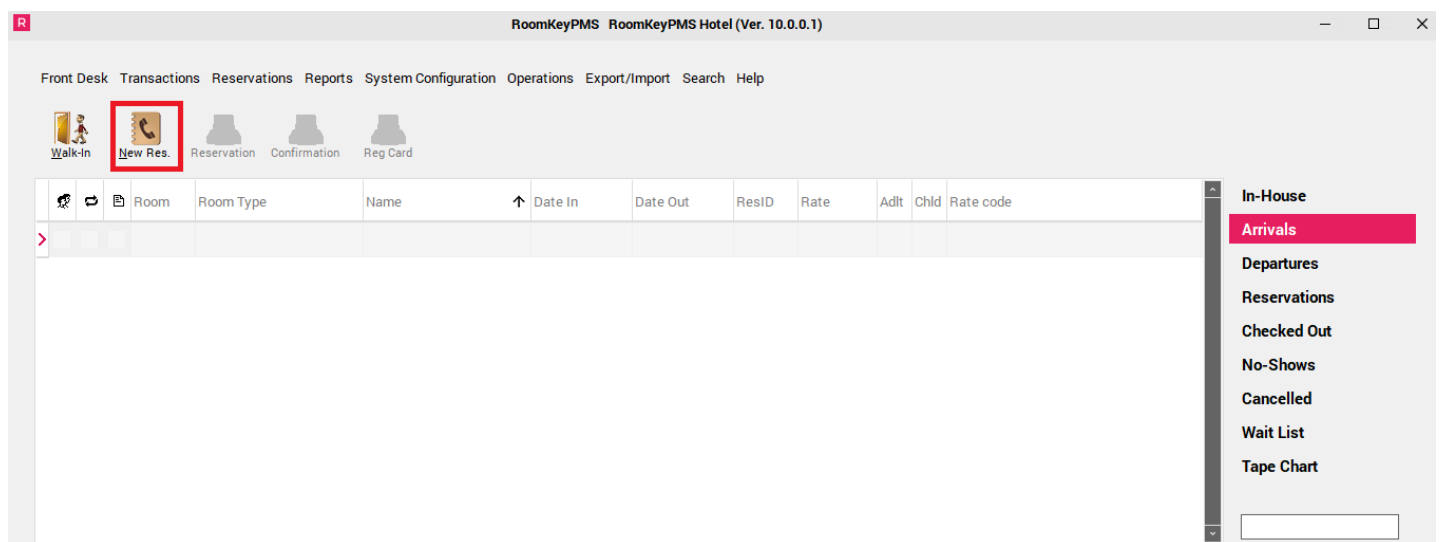


How to Create a Reservation for a Group Guest

The following steps review how to create a reservation for Group Guests that need to be attached to a specific Group Block in the PMS.

NOTE: Group reservations may also be entered via the Rooming List of the Group Wizard.

Step 1: Select the New Res button (or press the F2 function Key)



Step 2: Enter the reservation details

Start with entering the **Arrival** and **Departure** dates of the group first, *then* selecting the **Client Type**. You will notice that after making these selections, the **Group** box will automatically populate with any groups that are bookable over that date range. Using the drop down list, select the applicable Group Block that you wish to make a reservation for.

TIP: For booking a Group reservation, the Client Type must have the "Group/Tour/Convention" function assigned to it. This is set up in the Client Types Module.

- **Client Type** – this field allows you to select which type of client is booking, and acts as a Rate Filter. If you are making a reservation for a Corporate Booking, you may select your Corporate Client Type or for a Group Booking you may select your Group Client Type. In this example, we will use the drop down menu to select our Group Client Type for our Group Guest (NOTE: The Client Types in your PMS may vary from this document, depending on

your property's configuration. If you are unsure of which Client Type to select for a Group Booking please, confirm with your Manager). Selecting the proper Client Type allows the PMS to filter and display the proper rates for the room type and the time period selected.

- **Group** – when a Group Client Type is selected, and the Arrival and Departure dates are set to fall within the Group's block dates, the **Group** field will automatically populate with a list of available Groups. Use the drop down menu to select the appropriate Group Block for your reservation. This allows the PMS to further define which rates are available for a specific company. (NOTE: The binoculars icon can be selected to enter the Group Module should you need to look up, add or modify a Group Account at the time of booking).
- **Room Charge** – this drop down menu allows you to select the Room Charge Code that applies to this reservation. The default RCH Room Charge Code will most likely be selected for the majority of reservations created. An example of another Room Charge Transaction Code that may be available is a Room Charge Tax Exempt Code which would allow Room Charges to post without taxes. (NOTE: These codes may differ in your property depending on your specific PMS configuration, and should be confirmed with your Manager).
- **Arrival** – select the arrival date for this reservation
- **Nights** – select the number of nights the guest wishes to stay (NOTE: If you select a departure date, the number of nights will automatically populate)
- **Departure** – select the departure date for this reservation (NOTE: If you select the number of nights the guest wishes to stay, the departure date will automatically populate)
- **C/O Time** – this is the default check-out time for your property which is setup under System Configuration -> Property -> Contacts & Preference tab. If you wish to extend a late check-out to a guest, you may change the C/O Time here and it will then be reflected on the Housekeeping Reports (NOTE: As there is no AM/PM designation, it is a Best Practice to use 24 Hour/Military Time in this field)
- **Adults/Child** – select the number of adults & children that will be staying in the room. The number of people occupying a room can affect your rates, so ensure the correct number of people are input.

Reservation - NEW

Client Type: GROUP
Room Charge: RCH
Arrival: 22-May-2020
Departure: 25-May-2020
Nights: 3
C/O Time: 11:00
Adults: 2
Child: 0

Group: Mahogany Run PGA

Groups will display here based on Arrival and Departure dates

Rate: \$0.00
Taxes: \$0.00
Other: \$0.00
Total: \$0.00

☐ Guarantee
☐ Wait List

Refresh

Refresh

1. Click on the "Refresh" button to the far right hand side of the screen to load the available Rates & Inventory for the Arrival and Departure dates selected. You will notice a box-outline flashing around it when it needs to be clicked.
2. The Inventory that displays is based on the block that is currently set for this Group within the Groups Module. Rooms that are bookable as part of the block will be displayed in light blue, and rooms not being held in the block are displayed in red. The inventory numbers displayed are also specific to the block, and not the Hotel's overall inventory levels. In this example, we see only the OVK and OVSK rooms have available inventory, with 4 rooms each.

NOTE: If you change any of the parameters at the top of the screen, you must select the "Refresh" button to update your Rates & Inventory.

TIP: If you right click on one of the Room Types in the list below, a description of the room you are selling will appear on your screen!

How to Create a Reservation for a Group Guest

Choosing a Rate

Select the pivot arrow in the Rate column to view your Available Rates for a specific Room Type.

Calendar	Guest Info	Services	Travel Agent	Guest Share	Routing	Details
Book	Room Type	Rate	May 22 Fri	May 23 Sat	May 24 Sun	
	PROPERTY		6	6	6	
>	<input type="checkbox"/> SQQ	▶	5	5	5	
	<input type="checkbox"/> SK	▶	0	0	0	
	<input type="checkbox"/> DQQ	▶	1	1	1	
	<input type="checkbox"/> DK	▶	0	0	0	
	<input type="checkbox"/> EKS	▶	0	0	0	
	<input type="checkbox"/> House Account	▶	0	0	0	

To select a rate, check the checkbox beside the Rate Name.

Calendar	Guest Info	Services	Travel Agent	Guest Share	Routing	Details
Book	Room Type	Rate	May 22 Fri	May 23 Sat	May 24 Sun	
	PROPERTY		6	6	6	
>	<input type="checkbox"/> SQQ	▼	5	5	5	
		<div> <div>...</div> <div>Rate (click to view restrictions)</div> </div>				
		<div> <div>▶ <input type="checkbox"/> Group Rate</div> <div>\$166.67</div> </div>	\$175.00	\$175.00	\$150.00	
		<div> <div><input type="checkbox"/> MANUAL RATE</div> </div>				
	<input type="checkbox"/> SK	▶	0	0	0	
	<input type="checkbox"/> DQQ	▶	1	1	1	
	<input type="checkbox"/> DK	▶	0	0	0	
	<input type="checkbox"/> EKS	▶	0	0	0	
	<input type="checkbox"/> House Account	▶	0	0	0	

Assigning a room number (optional)

At this point, if you wish to assign a Room Number to the reservation, check the “Enable Assignment” box to the right of your screen. Use the drop down menu to select the desired Room Number (the list will only populate with the Room Numbers for the specific Room Type selected).

NOTE: Your property may not pre-assign or guarantee room numbers at time of booking, as availability for a specific room number can vary based by uncontrollable factors. Speak to your Manager to find out what your policy is in regards to pre-assigning Room Numbers.

CalendarGuest InfoServicesTravel AgentGuest ShareRoutingDetails

Book	Room Type	Rate	May 22 Fri	May 23 Sat	May 24 Sun
	PROPERTY		6	6	6
<input type="checkbox"/>	SQQ	▼Group Rate	5	5	5
		... Rate (click to view restrictions)			
		<input checked="" type="checkbox"/> Group Rate	\$166.67	\$175.00	\$175.00
		<input type="checkbox"/> MANUAL RATE			
<input type="checkbox"/>	SK	▶	0	0	0
<input type="checkbox"/>	DQQ	▶	1	1	1
<input type="checkbox"/>	DK	▶	0	0	0
<input type="checkbox"/>	EKS	▶	0	0	0
<input type="checkbox"/>	House Account	▶	0	0	0

Room Number:
204
☒ Enable assignment
☐ Lockoff

The Book Box

Now select the appropriate checkbox under the “Book” column to correspond with the Room Type & Rate you are looking for.

NOTE: Once you place a check in this box, you are telling the PMS that you are locking in the selections you have made. After checking this box, you will notice that the top portion of the screen where dates are selected will grey out, as will the the Room Assignment drop down from the previous step. In order to make changes to Client Type, Arrival / Departure Dates, number of people in the room, the selected Rate Plan, or the assigned Room Number, you will first need to uncheck this box.

Reservation - NEW

Client Type

GROUP

Group

Mahogany Run PGA

Rate

\$500.00

Taxes

\$25.00

Other

\$0.00

Total

\$525.00

Room Charge

RCH

Arrival

22-May-2020

Nights

3

Departure

25-May-2020

C/OTime

11:00

Adults

2

Child

0

☒ Guarantee
☐ Wait List

Refresh

Room Number:

204

☒ Enable assignment
☐ Lockoff

OK

Cancel

Calendar

Guest Info

Services

Travel Agent

Guest Share

Routing

Tasks

Details

Book	Room Type	Rate	May 22 Fri	May 23 Sat	May 24 Sun
	PROPERTY		6	6	6
<input checked="" type="checkbox"/>	SQQ	Group Rate	5	5	5
<input type="checkbox"/>	SK		0	0	0
<input type="checkbox"/>	DQQ		1	1	1
<input type="checkbox"/>	DK		0	0	0
<input type="checkbox"/>	EKS		0	0	0
<input type="checkbox"/>	House Account		0	0	0

☐ Enable Rate Overriding
☐ Enable Overbook
☐ Enable Restriction Overriding

ResID: 1020
Created by: ADMIN, RSI

Once a checkmark has been placed under the **"Book"** column, you will see the Room Rate + applicable Taxes for the guest's stay populate in the box at the top of your screen, and a Reservation ID number will be assigned to the booking in the bottom left hand corner of the screen.

Reservation - NEW

Client Type

GROUP

Group

Mahogany Run PGA

Rate

\$500.00

Taxes

\$25.00

Other

\$0.00

Total

\$525.00

Room Charge

RCH

Arrival

22-May-2020

Nights

3

Departure

25-May-2020

C/OTime

11:00

Adults

2

Child

0

☒ Guarantee
☐ Wait List

Refresh

Room Number:

204

☒ Enable assignment
☐ Lockoff

OK

Cancel

Calendar

Guest Info

Services

Travel Agent

Guest Share

Routing

Tasks

Details

Book	Room Type	Rate	May 22 Fri	May 23 Sat	May 24 Sun
	PROPERTY		6	6	6
<input checked="" type="checkbox"/>	SQQ	Group Rate	5	5	5
<input type="checkbox"/>	SK		0	0	0
<input type="checkbox"/>	DQQ		1	1	1
<input type="checkbox"/>	DK		0	0	0
<input type="checkbox"/>	EKS		0	0	0
<input type="checkbox"/>	House Account		0	0	0

☐ Enable Rate Overriding
☐ Enable Overbook
☐ Enable Restriction Overriding

ResID: 1020
Created by: ADMIN, RSI

How to Create a Reservation for a Group Guest

Page 6

Step 3 - Entering the Guest Information

Proceed to the “**Guest Info**” tab to enter the guest information.

NOTE: If your property has permission 2090 - Force Guest Search enabled, please consult this article before proceeding: [How to use the Search Feature when "Force Search" Permission is on](#)

The screenshot shows the 'Reservation - NEW' form with the 'Guest Info' tab selected. The form is divided into several sections:

- Client Information:** Client Type (GROUP), Group (Mahogany Run PGA), Room Charge (RCH), Arrival (22-May-2020), Nights (3), Departure (25-May-2020), C/OTime (11:00), Adults (2), Child (0).
- Financials:** Rate (\$500.00), Taxes (\$25.00), Other (\$0.00), Total (\$525.00).
- Guarantee:** ☒ Guarantee, ☐ Wait List.
- Room Information:** Room Number (204), ☒ Enable assignment, ☐ Lockoff.
- Guest Data:** Main Address, Second Address, ☐ Use Address from Group/Tour/Convention Account.
- Personal Information:** First Name, Last Name, Address, Zip, City, Country, State, Nationality, P/O Number, Telephone, Mobile, E-mail, Loyalty.
- Marketing:** ☒ Opt into Marketing Campaigns, ☒ Accept General Email, ☐ VIP.
- Payment:** Post Deposit: ☐ Amount: , Payment method, Card Type, Number, Expiry Date (MM YY), Auth, Card Holder, Credit Cards.
- Vehicle:** Make, Model, Color, License.
- Notes:** Source of Business, Guest Note, Res. Note (All Charges to Master Account).

Search past guest profiles

The first step should always be to search for an existing Guest Profile by using the **Magnifying Glass** icon to the right hand side of the screen. This way you can see if the guest has stayed at your property before, and already has an existing Guest history record.

Calendar Guest Info Services Travel Agent Guest Share Routing Tasks

Guest Data Custom Data

Main Address Second Address

First Name

Last Name

Address

Zip City

Country State

Nationality P/O Number

Telephone

Mobile

E-mail

Loyalty

☒ Opt into Marketing Campaigns

☒ Accept General Email

☐ VIP

Clear

Fill in either:

- Last Name (at least 1 characters needed) and First Name. *(NOTE: The more characters you enter for first & last name the more streamlined your search will be)*
- OR Loyalty Number

Select the **Search** button to the right of the screen to see if the guest has an existing Guest Profile.

Guest Search

Full Name	Phone	Address	City	Loyalty Number	E-mail
>					

TIP: Entering only the first few characters of a name & the first initial will help you find guests whose last name may have been misspelled.

First Name: Last Name: Required

Loyalty Number: E-mail:

A list of Guest Profile's fitting your search criteria will appear in the screen below. If the guest you are looking for is located in the list, click on their name (ensure the black arrow is pointing towards their name) and select the "OK" button at the bottom of the screen. The Guest's Profile Information will now automatically populate into the Guest Info Tab.

Reasons for doing a Guest Search:

- Makes the reservation process move a lot faster
- Ensures cleaner reporting (ie: # of guest stays) and a smaller more accurate database
- Duplicate Guest Profiles can be created if you manually enter the Guest Information for a guest that already has an existing Guest Profile in the PMS

Full Name	Phone	Address	City	Loyalty Number	E-mail
Smith, Dan	555-234-0987 ...	123 Ash Road	Beverly Hills		smithd@work
Smith, Helen	555-234-9875 ...	2155 Arlington Crescent	Schenectady		Helennn@home
Smith, Kelli	477-477-2345 ...	847 Main Street	Pueblo		thastsme@home

First Name: Last Name: Required Search

Loyalty Number: E-mail:

Ok Cancel

New Guest Profile

If the guest does not have a pre-existing Guest Profile, select the cancel button within the Guest Search box and proceed to fill in the guest information manually into the Guest Data screen below.

Enter as much information as possible. The more information you enter, the more useful it will be to you in the future. The absolute minimum that you will be required to enter is the First Name, Last Name and Telephone Number. If your property has setup Required Fields, those selected fields will be mandatory as well, and be shown in **bold**.

TIP: When filling in a guest's information, after inserting the U.S or Canadian Zip/Postal Code hit the TAB button and the PMS will automatically populate the City, Country and State for you!

- **Opt into Marking Campaigns** – check this box if the guest has agreed to be included in such things as Promotional Email Blasts
- **Accept General Email** – check this box if the guest has agreed to be accept general emails (ie: email confirmations) from your property
- **VIP** – check this box if this guest is to be identified as a VIP Guest. You may type more information regarding the guests VIP status in the blank box to the right of the VIP checkbox. NOTE: Once the reservation is created, the guest reservation will appear highlighted in green as a way of identifying the VIP reservation

☒ Opt into Marketing Campaigns
☒ Accept General Email
☐ VIP

- **Source of Business** – select how or where the guest heard about the property. Certain Statistical Reports in the PMS are produced based on Source of Business so it is important that this field is filled out to ensure accurate reporting.
- **Guest Note** – this area is for notes pertaining to the guest and will be saved on the Guest Profile and will appear on all future reservations until changed
- **Reservation Note** – this area is for notes pertaining to this reservation only and will not be saved on the Guest Profile
- **Post Deposit** – if the Policy in the PMS is set to take a deposit at the time of reservation, the amount of the deposit will appear in this box. Once the OK button is selected to create the reservation, the deposit will then be posted to the guest reservation.
- **Payment Method** – a valid method of payment must be placed on the reservation in order to guarantee the booking.

Source of Business	<input type="text"/>	Post Deposit: <input type="checkbox"/> Amount: <input type="text"/>
Guest Note	<input type="text"/>	Payment method
Res. Note	<input type="text"/>	Card Type <input type="text"/>
Vehicle Make <input type="text"/>	Model <input type="text"/>	Number <input type="text"/>
Color <input type="text"/>	License <input type="text"/>	Expiry Date <input type="text"/> (MM YY)
		Card Holder <input type="text"/>
		<input type="button" value="Credit Cards"/>

Entering Additional Credit Cards

Credit Cards – this button allows you to add two or more credit cards on a Guest Reservation.

1. After selecting the Credit Cards button the “Available Credit Cards” box will appear.
2. Select the “New” button at the top of the screen.
3. Enter the additional card information into the box below, and select the “Save” button and the additional card information will be saved.

The screenshot shows the 'Available Credit Cards' dialog box. Callout 1 points to the 'Credit Cards' button in the main form. Callout 2 points to the 'New' button in the 'Available Credit Cards' dialog. Callout 3 points to the input fields for card information (Type, Number, Expiry Date, Name on Card). Callout 4 points to the 'Save' button in the dialog.

Step 4: Selecting applicable Guest Services (optional)

If your property is using Guest Services, they should have already been entered into the PMS by your management team, and should be displayed on the right hand side of the screen.

Reservation - NEW

Client Type: LEISURE

Room Charge: RCH

Arrival: 16-May-2020 Nights: 3

Departure: 19-May-2020 C/OTime: 11:00

Adults: 2 Child: 0

Rate: \$1,180.00

Taxes: \$59.00

Other: \$0.00

Total: \$1,239.00

☒ Guarantee

☐ Wait List

Calendar Guest Info **Services** Travel Agent Guest Share Routing Tasks

Room Number:

☐ Enable assignment

Style: Regular

Service Name	Price	May 16 Sa	May 17 Su	May 18 Mo	Voucher
>					

Grouping: <ALL>

- > Airport Transfer
- Breakfast per Person
- Chocolate Covered Strawberries
- Early Check-In Request
- Extra Towels
- High Floor Request
- High Floor Request
- Hypoallergenic Bedding
- Late Check-Out Request
- Overnight Parking
- Pet In Room
- Rollaway Bed in Room

Service Charges: \$0.00

Taxes: \$0.00

Total: \$0.00

OK

Cancel

Choose the Service you would like to add to the reservation by clicking on the Service, and then using the arrow pointing towards the left to add the Service to the reservation.

Calendar Guest Info **Services** Travel Agent Guest Share Routing Tasks

Room Number:

☐ Enable assignment

Style: Regular

Service Name	Price	May 16 Sa	May 17 Su	May 18 Mo	Voucher
>					

Grouping: <ALL>

- Airport Transfer
- > Breakfast per Person**
- Chocolate Covered Strawberries
- Early Check-In Request
- Extra Towels
- High Floor Request
- High Floor Request
- Hypoallergenic Bedding
- Late Check-Out Request
- Overnight Parking
- Pet In Room
- Rollaway Bed in Room

Service Charges: \$0.00

Taxes: \$0.00

Total: \$0.00

OK

Cancel

The item will now display in the selected box. If there is a price already attached to this service it will be displayed under the "Price" column.

NOTE: If there is no price, or you would like to change the price, simply enter the desired amount into the "Price" column.

The highlighted number indicates how many times the Guest Service is being applied to the reservation each day. This is typically based on how the Service is setup, and whether it is based on a "per person", or "per room" pricing model. In this example, the Breakfast service is set to post per person, per day. Because this reservation is for 2 people, it will post twice each day,

once for each person in the room. If you wish to change how many times per day this Service posts, you can alter this number up or down as needed. Enter "0" to omit the service for a specific date.

CalendarGuest InfoServicesTravel AgentGuest ShareRoutingTasks

StyleRegular

Service Name	Price	May 16 Sa	May 17 Su	May 18 Mo	Voucher
> Breakfast per Person	\$10.00	2	2	2	

Service Charges: \$60.00

Taxes: \$3.00

Total: \$63.00

ResID:

Grouping<ALL>

Name

> Breakfast per Person

Chocolate Covered Strawberries

Early Check-In Request

Extra Towels

High Floor Request

High Floor Request

Hypoallergenic Bedding

Late Check-Out Request

Overnight Parking

Pet In Room

Rollaway Bed in Room

Room Number:

☐ Enable assignment

OK

Cancel

Step 5: Attaching a Travel Agent (if applicable)

If a Travel Agent needs to be attached to the booking, proceed to the Travel Agent tab. Use the drop down menu below to view a list of Travel Agents that already exist in the PMS.

If the Travel Agent you are searching for is not in the drop down menu, the Binoculars icon can be used to access the Travel Agent Module so that you may enter the new Travel Agent's information.

CalendarGuest InfoServicesTravel AgentGuest ShareRoutingTasks

Travel Agent

Search IATA

Contact

IATA

Override com. %

Default

%

Additional Travel Agents

Name	Contact	Commission
>		

Add

Delete

After you have selected the desired Travel Agent, you may manually enter the Contact Name into the Contact field below. Note how the Default Commission for this Travel Agent appears to the right hand side of the screen, if you wish to change the Commission Amount for this reservation only, input the new amount into the "Override Com%" box to the right.

Calendar
Guest Info
Services
Travel Agent
Guest Share
Routing
Tasks

Travel Agent
ABC Travel Agency
Search IATA

Contact
Ann Buchanan
IATA
010123
Override com. %
Default
10.00
%

Additional Travel Agents

Name	Contact	Commission
>		

Add
Delete

Should you need to add more then 1 Travel Agent to a booking, use the “Add” button below to attach additional Travel Agents to the booking.

Calendar
Guest Info
Services
Travel Agent
Guest Share
Routing
Tasks

Travel Agent
ABC Travel Agency
Search IATA

Contact
Ann Buchanan
IATA
010123
Override com. %
Default
10.00
%

Additional Travel Agents

Name	Contact	Commission
>		

Add
Delete

The Additional Travel Agents box will open, and you may attach another agent to this reservation, using the same steps as before. You can change the commission percentage on this reservation only by entering a new amount into the "Override com %" box.

Calendar Guest Info Services **Travel Agent** Guest Share Routing Tasks

Travel Agent Search IATA

Contact IATA **010123**

Override com. % Default **10.00** %

Additional Travel Agents

Name	Contact	Commission
>		

Ok Cancel

Travel Agent Search IATA

Contact Override com. % Default %

Step 6: Attach Guest Share (if applicable)

The Guest Share tab allows you to add a 2nd guest name to a reservation. This name can be there for informational purposes only (ie: in case someone calls looking for the guest) or it can be there for billing purposes (ie: to split room charges upon checkout).

Should you need to add a 2nd (or 3rd or 4th, etc...) guest name to a reservation, select the "Insert" button below.

Calendar Guest Info Services Travel Agent **Guest Share** Routing Tasks

First Name	Last Name	Use Folio	Folio	Store as Guest
>		<input type="checkbox"/>		<input type="checkbox"/>

Insert Delete Edit Post Cancel

Next, input the information of the Guest that will be sharing the Room.

- **First/Last Name** – Enter the first & last name of the sharing guest
- **Use Folio** – Check this box if you wish for this guest to have their own specific Folio where charges can be posted

- **Folio** – Once the Use Folio box is checked, a folio number will automatically be assigned to this guest. Any charges this guest wishes to pay for can be posted to this folio
- **Store as Guest** – If you wish to create a separate Guest Profile for this guest, check this box and then enter the Guest Information into the box that appears.

Once the Guest Share information has been input, select the “Post” button to save.

Calendar	Guest Info	Services	Travel Agent	Guest Share	Routing	Tasks
First Name		Last Name		Use Folio	Folio	Store as Guest
★ Jessica		Stone		<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>

Insert Delete Edit
Post Cancel

After the Post button is selected, you will have the option to “Split Room Charges Equally” by checking the check box below.

Calendar	Guest Info	Services	Travel Agent	Guest Share	Routing	Tasks
First Name		Last Name		Use Folio	Folio	Store as Guest
> Jessica		Stone		<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>

Insert Delete Edit
Split Room Charges Equally ☒
Post Cancel

Step 7: Setup Routing (if applicable)

The Routing tab allows you to:

- Setup specific Transaction Codes to transfer to a different Reservation
- Setup specific Transaction Codes to transfer to a specific Folio # on the Guest Folio

Scenario 1: To setup specific Transaction Codes to transfer to a different Reservation follow these steps:

Transaction Group – Use the drop down menu to select the Transaction Group where the Transaction Code is located (ie: Room Charge Transaction Codes are found under Room Charge, Payment Transaction Codes are found under Payment and all other Transaction Codes are located under Other Charges) If you are routing ALL charges then you would select <ALL>.

- **Transaction Code** - Select the Transaction Code you wish to Route.
- **Folio Number** – select Folio 1 unless you would like the Transaction to Route to a specific folio number on the destination reservation, use the drop down menu to select the applicable Folio Number. NOTE: The Route to the same booking box should NOT be checked, unless you intend to route the charges to another folio on the same reservation.
- **Amount (Optional)** - If the permission "1546 - Route By Amount" is enabled for both your property, and your user ID, you may see this field. The amount that you enter into this box will be calculated on a daily basis. For example, if my Room Charge is \$200 per night, and I enter \$75 into the Amount field, it will route \$75 of the \$200 daily Room Charge to the folio I choose.
- **Percentage (Optional)** - As with the Amount field, this will only be displayed if the permission "1546 - Route By Amount" is enabled for both your property, and your user ID. This field acts as a modifier, and indicates that the value entered into the Amount field should be treated as a percentage. For example, if I enter "75" into the Amount field, and check the percentage box, the PMS will route 75% of the daily Room Charge, instead of \$75.

Transaction Group	Transaction	Res. ID	Room	Guest Name	Folio	Amount	%
>							<input type="checkbox"/>

Transaction Group

Transaction Code

Folio Number ☐ Route to the same booking

Amount ☐ Percentage (Amount routing feature only works on future postings!!)

Res. ID Room

Name

Filtered by

☒ In House
☐ Reservations
☐ None

Add Update Delete Reload

- Now select where the charges are going to be routed. Using the **"Filtered By"** settings select whether the guest is In House, Reservations (not in house yet but has a reservation) or None (will show all guests)
- Select the **"RELOAD"** button to load the guest Res ID information

- Select the correct Res ID from your list (This is the destination Reservation where the routed charges should end up)
- Click **"ADD"**

Transaction Group	Transaction	Res. ID	Room	Guest Name	Folio	Amount	%
>							<input type="checkbox"/>

Transaction Group
Room Charge

Transaction Code
RCH
Room Charge

Folio Number
1
☐ Route to the same booking

Amount
0.00
☐ Percentage (Amount routing feature only works on future postings!!)

Res. ID
1002
Room
203

Name
Murdock Bryan

Filtered by
☒ In House
☐ Reservations
☐ None

Add
Update
Delete
Reload

If needed, continue the first three steps to add more transaction codes. Hit the **"Add"** button so the charges move up onto your list.

When the routing is successfully set up, it will be displayed in the list of routed charges.

Transaction Group	Transaction	Res. ID	Room	Guest Name	Folio	Amount	%
>	Room Charge	RCH	1002 203	Murdock Bryan	1	0	<input type="checkbox"/>

Transaction Group
Room Charge

Transaction Code
RCH
Room Charge

Folio Number
1
☐ Route to the same booking

Amount
0.00
☐ Percentage (Amount routing feature only works on future postings!!)

Res. ID
1002
Room
203

Name
Murdock Bryan

Filtered by
☒ In House
☐ Reservations
☐ None

Add
Update
Delete
Reload

Scenario 2: Setup specific Transaction Codes to transfer to a specific Folio # on the same Guest Folio

- **Transaction Group** – Use the drop down menu to select the Transaction Group where the Transaction Code is located (ie: Room Charge Transaction Codes are found under Room Charge, Payment Transaction Codes are found under Payment and all other Transaction

Codes are located under Other Charges) If you are routing ALL charges then you would select <ALL>.

- **Transaction Code** - Select the Transaction Code you wish to Route.
- **Folio Number** – select the folio number where you would like the Transaction Code to post.
- **Route to the Same Booking** – check this box
- **Amount** (*Optional*) - If the permission "1546 - Route By Amount" is enabled for both your property, and your user ID, you may see this field. The amount that you enter into this box will be calculated on a daily basis. For example, if my Room Charge is \$200 per night, and I enter \$75 into the Amount field, it will route \$75 of the \$200 daily Room Charge to the folio I choose.
- **Percentage** (*Optional*) - As with the Amount field, this will only be displayed if the permission "1546 - Route By Amount" is enabled for both your property, and your user ID. This field acts as a modifier, and indicates that the value entered into the Amount field should be treated as a percentage. For example, if I enter "75" into the Amount field, and check the percentage box, the PMS will route 75% of the daily Room Charge, instead of \$75.
- Select the **"Add"** button at the bottom of the screen

The screenshot shows the 'Routing' tab in a PMS interface. At the top, a table lists transaction details with columns: Transaction Group, Transaction, Res. ID, Room, Guest Name, Folio, Amount, and %. Below this is a form for configuring routing. The form includes a 'Transaction Group' dropdown set to 'Room Charge', a 'Transaction Code' dropdown set to 'RCH', a 'Folio Number' dropdown set to '2', an 'Amount' field set to '0.00', and a checked 'Route to the same booking' checkbox. There is also an unchecked 'Percentage' checkbox with a note: '(Amount routing feature only works on future postings!!)'. At the bottom of the form, there are buttons for 'Add', 'Update', 'Delete', and 'Reload'. To the right of these buttons is a 'Filtered by' section with radio buttons for 'In House' (selected), 'Reservations', and 'None'.

If needed, continue the first three steps to add more transaction codes. Hit the **"Add"** button so the charges move up onto your list.

When the routing is successfully set up, it will be displayed in the list of routed charges.

Transaction Group	Transaction	Res. ID	Room	Guest Name	Folio	Amount	%
> Room Charge	RCH	0			2	0	<input type="checkbox"/>

Transaction Group: Room Charge

Transaction Code: RCH Room Charge

Folio Number: 2 ☒ Route to the same booking

Amount: 0.00 ☐ Percentage (Amount routing feature only works on future postings!!)

Res. ID: Room:

Name:

Filtered by:
☒ In House
☐ Reservations
☐ None

Add

Update

Delete

Reload

Step 8: Complete the Reservation

Once all the reservation information has been added to the booking, select the **"OK"** button to create the reservation in the PMS.

Reservation - NEW

Client Type: GROUP Group: Mahogany Run PGA

Room Charge: RCH

Arrival: 22-May-2020 Nights: 3

Departure: 25-May-2020 C/OTime: 11:00

Adults: 2 Child: 0

Rate: \$500.00

Taxes: \$25.00

Other: \$0.00

Total: \$525.00

☒ Guarantee ☐ Wait List

Calendar Guest Info Services Travel Agent Guest Share Routing Tasks

Details

Book	Room Type	Rate	May 22 Fri	May 23 Sat	May 24 Sun
<input type="checkbox"/>	PROPERTY		6	6	6
> <input checked="" type="checkbox"/>	SQQ	Group Rate	5	5	5
<input type="checkbox"/>	SK		0	0	0
<input type="checkbox"/>	DQQ		1	1	1
<input type="checkbox"/>	DK		0	0	0
<input type="checkbox"/>	EKS		0	0	0
<input type="checkbox"/>	House Account		0	0	0

☐ Enable Rate Overriding
☐ Enable Overbook
☐ Enable Restriction Overriding

ResID: 1020 Created by: ADMIN, RSI

Refresh

Room Number: 204

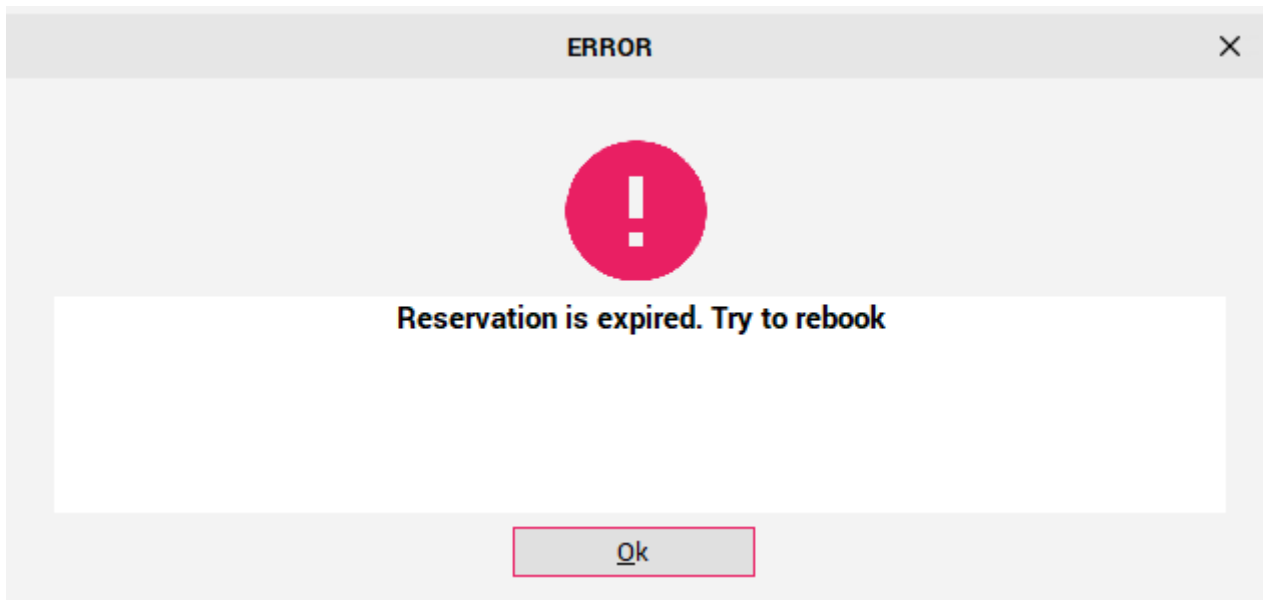
☒ Enable assignment ☐ Lockoff

☒ OK

Cancel

"Reservation is Expired" message

You have 5 minutes to complete the booking process, if you do not complete the booking process within this time you will receive a message that the reservation has expired.



Refreshing reservation

To refresh and complete your reservation:

1. Go to the Calendar Tab,
2. Uncheck the checkbox under the **Book** column
3. Select the **Refresh** button to ensure the room is still available
4. Recheck the checkbox under the **Book** column
5. Select **OK** to create the reservation.

Reservation - NEW

Client Type: GROUP Group: Mahogany Run PGA Rate: \$0.00

Room Charge: RCH Taxes: \$0.00

Arrival: 22-May-2020 Nights: 3 Other: \$0.00

Departure: 25-May-2020 C/OTime: 11:00 Total: \$0.00

Adults: 2 Child: 0

Calendar Guest Info Services Travel Agent Guest Share Routing Convert Rate Details

Book	Room Type	Rate	May 22 Fri	May 23 Sat	May 24 Sun
	PROPERTY		6	6	6
<input type="checkbox"/>	SQQ	Group Rate	5	5	5
<input type="checkbox"/>	SK		0	0	0
<input type="checkbox"/>	DQQ		1	1	1
<input type="checkbox"/>	OK		0	0	0
<input type="checkbox"/>	EKS		0	0	0
<input type="checkbox"/>	House Account		0	0	0

☐ Enable Rate Overriding ☐ Enable Overbook ☐ Enable Restriction Overriding

ResID: 1020 Created by: ADMIN, RSI

☒ Guarantee ☐ Wait List

Refresh

Room Number: 204

☒ Enable assignment ☐ Lockoff

Reviewing the completed Reservation

Once created, the reservation will then appear in the PMS. Notice the highlighted fields showing the Group Information for this booking.

RoomKeyPMS RoomKeyPMS Hotel (Ver. 10.0.0.1)

Front DeskTransactionsReservationsReportsSystem ConfigurationOperationsExport/ImportSearchHelp

Walk-InNew Res.Change Res.CancelReservationConfirmationGuest FolioPost ChargesPost Payment

	Room	Room Type	Name	Date In	Date Out	Stay	ResID	Rate	Adlt	Chld	Rate code
>	204	SQQ	Brown, Luis	22-May-2020	25-May-2020	-25	1020	\$166.67	2	0	Group Rate

In-HouseArrivalsDeparturesReservationsChecked OutNo-ShowsCancelledWait ListTape Chart

22-05-20

Guest InfoFolio

Title:

First name: Luis

Last name: Brown

Street address: 223 Bell Blvd

City: Fairfax

State: Virginia

Country: United States

Zip: 22031

Telephone: 321-446-4875

Mobile:

E-mail: lbrown@email.com

Client Type: Group/Tour

Rate Code: Group Rate

Source:

Vehicle License:

Card Type: MC

Expiry (mm/yy): 05 / 23

Card Number: *****1111

Card Holder: Luis M. Brown

Travel Agency: Group/Tour Mahogany Run PGA

Guarantee to Credit Card

Guest Note:

Reservation note: All Charges to Master Account

ADMIN, RSI

27-Apr-2020 04:09 PM

SmartBackup not available