

How to Create a Group with Billing to a City Ledger Account

The following article discusses how to set up a group where either a portion, or all of the charges are to be Direct Billed to a City Ledger Account.

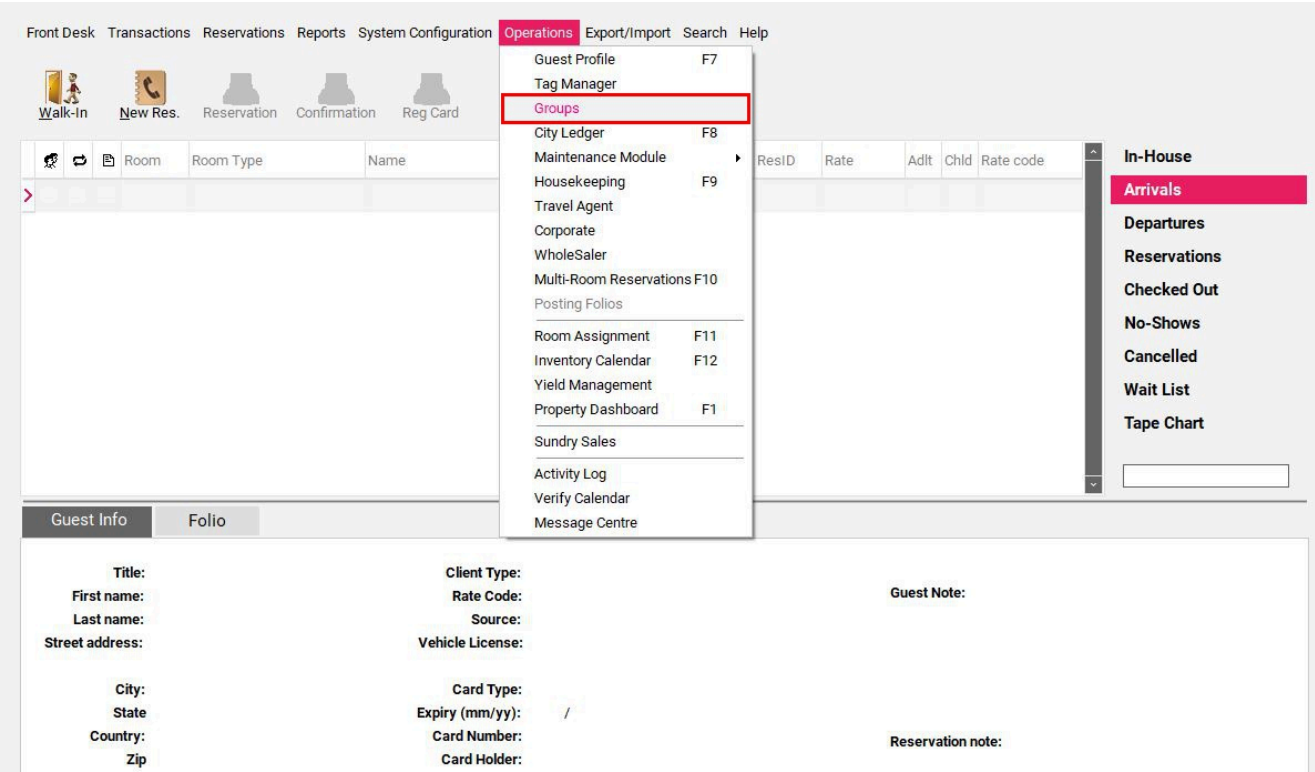
With City Account Billing you are not only able transfer Room & Tax to the City Ledger but also other Incidental Charges as well. (NOTE: Incidental Charges must be setup to “route” to folio 8 in order for the transfer to occur).

The steps to creating a Group with billing to a City Account are the exact same as creating an [Individual Pay Group](#), with the exception of certain information entered on the Contact & Billing Info tab.

Click below to view step-by-step instructions:

Access the Groups Module

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



The Group Master contains a list of all active Groups currently found in the PMS. 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
> Jones Family Reunion	JFR102320		23-Oct-2020	25-Oct-2020	Solid	23-Oct-2020	

New

Copy

Open

View Res.

Group Details

Group Pickup

eRes Page

Cancel Group

Close

1. Primary

Fill in the **General** tab of the **Primary** section.

1. Primary

2. Rates

3. Block

4. Guest Services

5. Rooming List

6. Check-In

7. Check-Out

8. Notes

General

Contact & Billing Info

Travel Agent

Name

Group ID

(A unique ID for your group)

Client type

GROUP

Room Charge Code

RCH

Arrival Date

27-May-2020

Nights

1

Departure Date

28-May-2020

C/OTime

11:00

☐

Guests can arrive and depart outside of the block

0

Days Before

0

Days After

Active

☐

Cut-off Days

0

Cut-off Type

Whole Block

Block Type

Solid

Source of Business

Attach Note

Post

Cancel

Group:

General tab

- **Name** – the name of the 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 either of the following:
 - Solid Block Type: the rooms are taken out of general inventory
 - Transparent Block Type: the rooms are not taken out of general inventory, so the group guests may be in competition with the general public for the guestroom 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 (ie: "All charges to be paid by the individual guests" or "Room & Tax to be covered by the group Master Account")

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

General **Contact & Billing Info** Travel Agent

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 ☒

Out-off Days:

Out-off Type:

Block Type:

Source of Business:

Attach Note:

Post Cancel

Group: Topsail Yachts Retreat

Contact & Billing Info tab

Fill in the **Contact & Billing Info** tab of the **Primary** screen

- **Folio Number** - Use the drop down menu to select folio number 8. When room & taxes are to be transferred to a City Account upon check-out the Folio Number **MUST** be set to 8.
- **Apply to existing reservations** - Only check this box when changing the billing for a group from Folio 1 to Folio 8 (or vice versa). Checking this box will ensure all existing reservations for this group are updated with the correct Folio number.
- **Bill to City Account** – check this box to open the **Bill To** drop down menu
- **Bill To** – if the City Account already exists, use the **Bill To** drop down menu to search for the existing City Account. If the City Account does not yet exist, check the **Create a New Account** check-box to the left, and then type the name of the account and desired Credit Limit manually into this area. Once the information is saved it will create the City Account in the City Ledger Module for you.
- **Credit Limit** – if a City Account is selected from the **Bill To** drop down menu, the credit limit will auto populate with the credit limit for the selected City Account. If you have manually entered a City Account, you will also manually enter the Credit Limit that applies to the City Account. **NOTE: The Credit Limit should always be enough to cover all charges that are expected to be transferred to the City Ledger upon check-out. If an account has insufficient credit, it will prevent the PMS from being able to check out to that account.**
- **Create a New Account** – Only check this box if you wish to attach a City Account to this group that does not already exist in the City Ledger Module. Checking this box allows you to create a new City Ledger Account by entering the City Account name into the **Bill To** field,

then assigning an account Credit Limit by entering the desired credit limit into the **Credit Limit** area.

- **Use account to fill up address** – if a City Account is selected from the **Bill To** drop down menu, you may check this box and the address information below will populate with the same address found on the City Account
- **Address information** – if you did not use the **Use account to fill up address** checkbox feature above, manually 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

General **Contact & Billing Info** Travel Agent

Folio number 8 (Room and Tax Charges) ☐ Apply to existing reservations

Bill to city account ☒ Bill To Topsail Yachts ☒ Create a new account

Credit limit 500000 ☐ Use account to fill up address

Address 5135 Yacht Club Road

Zip 00802

City St Thomas

Country United States

State Virgin Islands

Contact James Monteiro

Phone 340-775-6454

Email james@topsail.com

Fax

Tag

Sales Manager

Group: Topsail Yachts Retreat

Post Cancel

Folio 1 vs. Folio 8

When setting up billing for a Group, there are two available options for where to route the Room & Tax charges:

- **Folio 1** - To be used when the guest is personally responsible for settlement of any stay-related charges on their bill. This would typically be used for any Individual Pay scenarios.
- **Folio 8** - To be used when a 3rd Party is covering all, or a portion of the charges on the bill. This would typically be used when charges are being billed to a House (Master) Account, or a City Ledger Account.

Folio number 8 (Room and Tax Charges) ☐ Apply to existing reservations

Bill to city account ☒ Bill To Topsail Yachts ☒ Create a new account

Credit limit 500000 ☐ Use account to fill up address

Routing / Deposit tab

If additional incidental charges (ie: Telephone, Parking, etc...) also need to be routed to the City Ledger Account upon check-out, this must be set up in the **Routing/Deposit** tab. To set up routing for incidental charges, proceed to the **Routing/Deposit** tab of the **Primary** section.

In the top left hand corner we see the **House Accounts** section and in the list of House Accounts is **Res.ID #0**. This is the account used to setup additional routing for all guests within a group.

NOTE: *If you wish to only route incidental charges for a few guests within the group then routing must be setup on each individual guest reservation.*

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

General Contact & Billing Info Travel Agent **Routing / Deposit**

House Accounts

Res.ID	Room #	Status
> 0		

Make sure that "Res.ID 0" is selected here before setting up routing.

Add House Account
Cancel
Check in
Change
Deposit

Transaction Group: [Dropdown]
Transaction Code: [Dropdown]
Description: [Text Field]
Folio Number: [Dropdown]
Amount: 0.00 ☐ Percentage

Add Update Delete

Transaction Group	Transaction	Folio	Amount	%
>				<input type="checkbox"/>

Post Cancel

Group: Topsail Yachts Retreat

In this example, we wish to route "Guest WiFi Access" to Folio 8 (because only charges on Folio 8 will be transferred to the City Ledger upon check-out).

- **Transaction Group** – select which Transaction Group where the desired Transaction Code is located (ie: Other Charges)
- **Transaction Code** – select the desired Transaction Code to route (in this example, "WiFi" is for Guest WiFi Access)
- **Folio** – select Folio 8

When finished, select the **Add** button to add the Transaction Code to the Routing Instructions on the right. Repeat these steps to add any other Transaction Codes that need to be routed.

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

General Contact & Billing Info Travel Agent **Routing / Deposit**

House Accounts

Res. ID	Room #	Status
>	0	

Add House Account

Cancel

Check in

Change

Deposit

Transaction Group: Other Charge

Transaction Code: WELCOME

Description: Welcome Gift

Folio Number: 8

Amount: 0.00 ☐ Percentage

Add Update Delete

Transaction Group	Transaction	Folio	Amount	%
>				<input type="checkbox"/>

Post Cancel

Post Cancel

Group: Topsail Yachts Retreat

Once the all the required Routing Instructions appear in the list on the right, click **Post** to save.

"WiFi" will now post to Folio 8 on every guest folio in the group. Since all charges from Folio 8 will be transferred to the City Ledger upon check-out, any "WiFi" charges will also transfer to the City Ledger, in addition to the Room & Tax charges.

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

General Contact & Billing Info Travel Agent **Routing / Deposit**

House Accounts

Res. ID	Room #	Status
>	0	

Add House Account

Cancel

Check in

Change

Deposit

Transaction Group: Other Charge

Transaction Code: WELCOME

Description: Welcome Gift

Folio Number: 8

Amount: 0.00 ☐ Percentage

Add Update Delete

Transaction Group	Transaction	Folio	Amount	%
> Other Charge	WELCOME	8	\$0.00	<input type="checkbox"/>

Post Cancel

Post Cancel

Group: Topsail Yachts Retreat

Things to remember about Groups with City Ledger Billing

- Folio number **must** be set to 8 in the Contacts and Billing Info tab
- You can check the **Use Account to fill up Address** box to use the address from the attached City Ledger Account to populate the Group Contact Address
- For any additional Incidental Charges to be routed to the City Ledger Account, the routing instructions **must** be set up in the **Routing/Deposit** tab
- City Ledger Billing is intended for use with groups that will be invoiced after departure (as opposed to settling upon check-out - See the article [How to Create a Group with Billing to a House Account](#) for that billing scenario)
- City Ledger Invoices show charges broken out by individual guest names on the final bill
- For guests whose charges are **NOT** being routed to a City Ledger Account, the routing on their individual reservations must be updated to Folio 1. This can be done on the **Rooming List** tab, please see the article [How to Create a Group Reservation using the Group Rooming List](#) for more information.

Travel Agent

Fill in the Travel Agent tab of the Primary Section (*If this group was not booked via a Travel Agent then you may skip this tab*).

If the Group was booked by a Travel Agent and you wish to track the Travel Agent Commission, you will need to attach the Travel Agent to the Group.

- Use the drop down menu to select a Travel Agent from the list of Travel Agents that are currently set up in the Travel Agent Module. Once a Travel Agent is selected the IATA number and Default Commission Rate will populate to the right of the Travel Agent Name.
- If the Travel Agent has a different commission than the one indicated, enter the name of the Travel Agent in the **Contact** box, then enter the new commission rate in the **Override Commission %** box
- If the Travel Agent does not yet have a profile, click the **Binoculars** button (next to the drop-down menu) to open up the Travel Agent Module so that a new Travel Agent may be created.
- Once a Travel Agent has been selected, click **Post**.

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

General Contact & Billing Info **Travel Agent** Routing / Deposit

Travel Agent BMI Travel IATA 010123

Contact

Override commission % Default commission: 10 %

Group: Topsail Yachts Retreat

Post Cancel

2. Rates

Attach rates via the Rates Section.

NOTE: Group Rates should always be attached at the same time the group is created. If Group Rates are not attached, then Forecast Reports will not report on the potential Group Revenue for the group, as they will have no basis for calculation.

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

Build Attach Rate Plans Group Default Rate

Rate Wizard **No Rates Attached to Group in Rate Wizard**

Room Type

Manual Rate Single Double Triple Quad Extra Child

Attached Rates

> Manual Rate

Romantic Rendez-Vous Package

Available Rates

> *Best Available Rate

*Best Available Rate / GDS

*Best Available Rate / Hotel Website

4th Night Free!

AAA/CAA Rate

AAA/CAA Rate / GDS

AAA/CAA Rate / Hotel Website

AARP Rates

AARP Rates / GDS

AARP Rates / Hotel Website

ABC Company

ABC Company / Hotel Website

Advanced Purchase Rate

Default Rate

Group: Topsail Yachts Retreat

Attaching Rates to the Group

When assigning a Rate Plan to a Group you have a few options:

1. Create a unique Rate Plan specifically for the Group. This is useful if a group stays several times during the year, and always has the same rate.
2. Create a generic Group Rate for use with all Groups. Using the "Override Default Rate" feature, this generic Group Rate can be overridden in the Group Wizard to create a unique rate for each group, based on their individual Group Contract.
3. Create Group Rate Plans based on the Market Segmentation of the Groups (ie: SMERF Group Rate, Corporate Group Rate, Wedding Group Rate, etc...). The right rate can then be attached to the appropriate group, and be overridden using the "Override Default Rate" feature to customize the rate based on the Group Contract. This allows reporting on Market Segmentation based on the Rate Plans assigned to each group.
4. Assign a Manual Rate (this is the least recommended option)

If proceeding with Options 1, 2 or 3, the rate will need to be attached to the group via the Rate Wizard. Click the **Rate Wizard** button to open the Rate Wizard Module.

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

Build Attach Rate Plans

Rate Wizard

Group Default Rate

No Rates Attached to Group in Rate Wizard

Room Type

Manual Rate

Single

Double

Triple

Quad

Extra

Child

The Rate Wizard Module will open. If you do not already have a Rate Plan created for this Group, use the **green +** sign to add a rate at this time. (Please see [How to create a Rate Plan using the Rate Wizard](#) if unsure of how to build a new rate).

If using an existing rate for this group:

1. Select the rate
2. Click the **Edit** button to open it

Rate Wizard

Rate	Rate Code	Hotel Website	GDS	CRS	Lock-off	Direct	Tier Enabled	Period
*Best Available Rate	BAR	✓	✓	-	-	✓	-	Daily
AAA/CAA Rate	AAA	✓	✓	-	-	✓	✓	Daily
AARP Rates	AARP	✓	✓	-	-	✓	✓	Daily
ABC Company	ABCCO	✓	-	-	-	✓	✓	Daily
Advanced Purchase Rate	ADV	✓	✓	-	-	✓	✓	Daily
Booking.com Rate	BOOK	✓	✓	-	-	✓	✓	Daily
Corporate Preferred Rate	CORPPREF	✓	-	-	-	✓	✓	Daily
Corporate Standard Rate	CORPSTND	✓	✓	-	-	✓	✓	Daily
Expedia Flash Sale Prepaid	EXPFLS	-	✓	-	-	✓	✓	Daily
Expedia Hotel Collect	EXPHC	-	✓	-	-	✓	✓	Daily
Expedia Prepaid	EXPPP	-	✓	-	-	✓	✓	Daily
Group Rate	GRP	✓	-	-	-	✓	✓	Daily
JacTravel Rate	JACTRAV	-	-	-	-	✓	✓	Daily
Microsoft	Microsoft	✓	-	-	-	✓	✓	Daily
Package Base Rate	PKG	✓	✓	-	-	✓	✓	Daily
PROMOTION 10	PROMO10	✓	-	-	-	✓	✓	Daily
PROMOTION 5	PROMO5	✓	-	-	-	✓	✓	Daily
Sweetheart Package Base Rates	SWEET	✓	-	-	-	✓	✓	Daily
Tourico Rate	TOURICO	✓	✓	-	-	✓	✓	Daily

+

RATE CATEGORIES

CLIENT TYPES

MARKET SEGMENTS

Next

1. With the rate open, proceed to the **Groups** tab
2. Select the "+" symbol next to **Hotel Direct** to expand the list to show all active groups
3. Place a check-mark next to the group this rate will be attached to (if using a generic Group Rate, it may be attached to multiple groups at the same time. This is fine, as each time the rate is attached to a group using this process, the PMS copies the rate to the group as a duplicate. This means that each group has it's own unique instance of the rate on it, and any changes made to

the rate on one group will not affect the rates on another group. This is what makes using one Group Rate for all groups possible)

4. Click the **Update** button to save

NOTE: If you need to attach more rates to the group (ie. a "Comp" Rate Plan), repeat these steps on any other Rates needed.

General Client Types Corporates **Groups**

☒ Hotel Direct

- ☒ Jones Family Reunion
- ☒ Topsail Yachts Retreat

☐ Hotel Website

- ☐ Jones Family Reunion
- ☐ Topsail Yachts Retreat

If you want the group to be able to book rooms via the eRes Online Booking Engine, You must also attach the group here under the **Hotel Website** channel.

Update

Setting the Default Rate

Once the rate(s) is(are) attached, exit the Rate Wizard to return to the Group Wizard.

1. Using the **Group Default Rate** drop down menu, select the default rate to be used when making a reservation for this group. (The rate selected here will be used by the PMS to calculate the Room Revenue totals for the Forecast Report).
2. Click **Post** to save the selected rate as the Default for the Group.

Group Wizard

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

Build Attach Rate Plans

Rate Wizard

Group Default Rate

Group Rate

Post Cancel

Room Type DK

Manual Rate

Single Double Triple Quad Extra Child

Attached Rates

Manual Rate

Romantic Rendez-Vous Package

Group Rate

Group Rate / Hotel Website

Available Rates

*Best Available Rate

*Best Available Rate - Billed Weekly

*Best Available Rate / GDS

*Best Available Rate / Hotel Website

4th Night Free!

AAA Rate

AAA Rate / GDS

AAA Rate / Hotel Website

AARP Rates

AARP Rates / GDS

AARP Rates / Hotel Website

ABC Company

ABC Company / Hotel Website

Default Rate

Group: Topsail Yachts Retreat

Using Rate Override (to customize the rate for the group)

At this point, if you wish to Override the Rate of your Group Default Rate for this particular Group, you can select the **Override Default Rate** button located to the right of the Default Rate.

NOTE: When the "Group Rate" was attached to this group, it was in fact copied to the group as a new instance of the rate. Making any changes to the rate here via the **Override Attached Rates** feature will ONLY affect THIS group. Any other groups that may have the same "Group Rate" attached will NOT be affected by any rate changes made locally here. It will also NOT affect the original version of the rate in the Rate Wizard. This allows the user to make group-specific customizations to a rate without endangering the integrity of the same rate on another group.

There are two ways you can Override the Default Rate set for the Group:

- By Days in Group Block
- By Date Range

Option 1: In the **Override Rates by Days in Group Block** tab, the stay dates for the group are displayed (including pre & post nights). In this example, if I only want to change the rate of my Pre & Post nights, then I would un-check the desired dates under **2 Day Main Group Block** on the left (or simply un-check the appropriate box on the far right side to remove a groups of days).

NOTE: The amounts showing in the Rate Template at the bottom are the price variances between Room Types, as they were pulled from the original rate in the Rate Wizard when this rate was copied over. In order to change them here, they need to be changed on the original rate in the Rate Wizard. Using rate variances on a Group Rate is optional. If you prefer to have a more customizable approach to the group rates, you may wish to make the Group Rate a tiered rate in the Rate Wizard. For more information on this, please see the [How to Setup Tiering](#) article in the Rates manual.

Rate Overrides for Topsail Yachts Retreat

Rate Name:

Override Rates by Days in Group Block | Override Rates by Date Range

2 Day Main Group Block
☒ Fri Nov 20 ☒ Sat Nov 21

Uncheck day by day OR Uncheck a group of days ☒

Room Type	Single:	Double:	Triple:	Quad:	Extra:	Child:
<input checked="" type="checkbox"/> SQQ	0.00	0.00	0.00	0.00	0.00	0.00
<input checked="" type="checkbox"/> SK	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> DQQ	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> DK	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> EKS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

The next step is to update the Group Rate in the Rate Template below.

1. Enter the new "base rate"
2. Click Save

NOTE: This Rate Template works the same as the one located in the Rate Wizard. The base rate is entered into the top line, and the amounts from the template below are added onto that, creating different prices for different room types. For more information on using the template, see the [How to Build a Rate Template](#) article of the Rates manual.

Rate Overrides for Topsail Yachts Retreat

Rate Name:

Override Rates by Days in Group Block | Override Rates by Date Range

2 Day Main Group Block
☒ Fri Nov 20 ☒ Sat Nov 21

Room Type	Single:	Double:	Triple:	Quad:	Extra:	Child:
<input checked="" type="checkbox"/> SQQ	100	100	100	100	0.00	0.00
<input checked="" type="checkbox"/> SK	\$100.00	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> DQQ	\$100.00	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> DK	\$100.00	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> EKS	\$100.00	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00

Remove Overrides | Reset Grid | **Save**

Rates Currently Set :

Room Type	Fri Nov 20	Sat Nov 21
> SQQ	\$175.00	\$175.00
SK	\$185.00	\$185.00
DQQ	\$200.00	\$200.00
DK	\$210.00	\$210.00
EKS	\$410.00	\$410.00
PHV	\$925.00	\$925.00
PHS	\$440.00	\$440.00

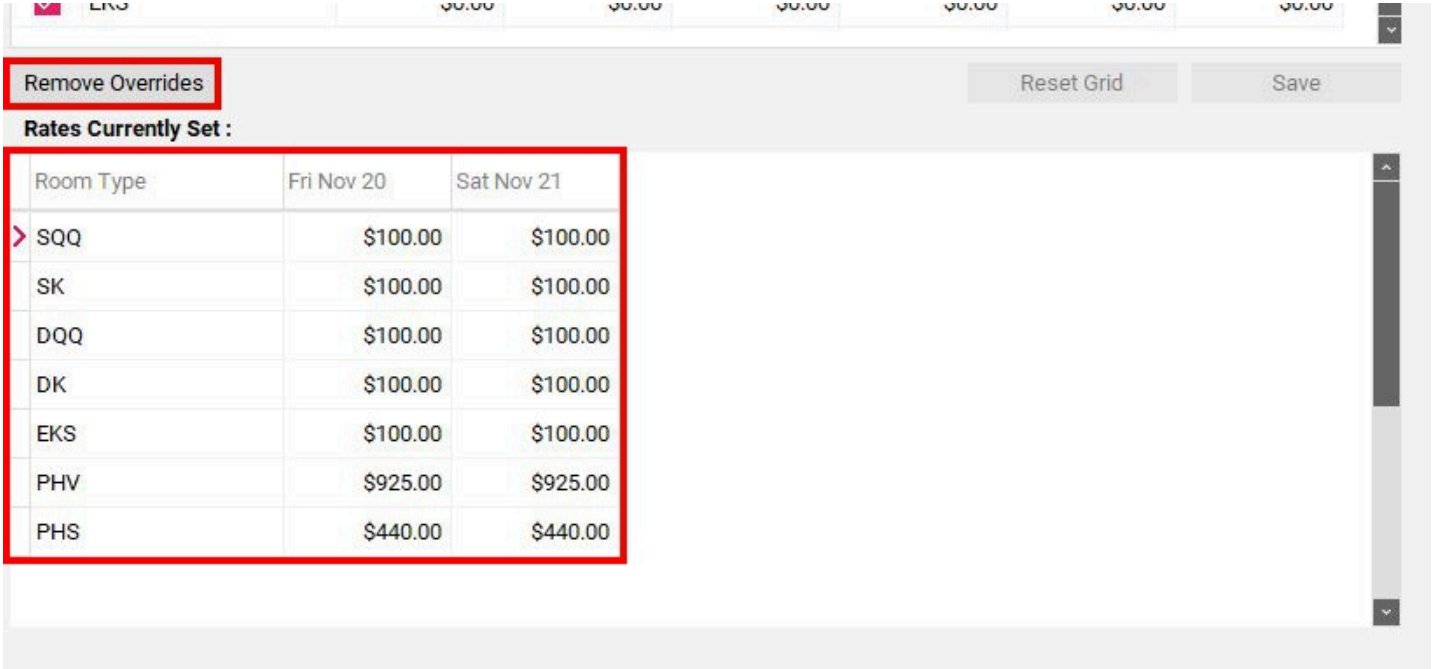
This area displays the rate values currently set for the Group Rate.

A message will appear to advise that the Override was successful.

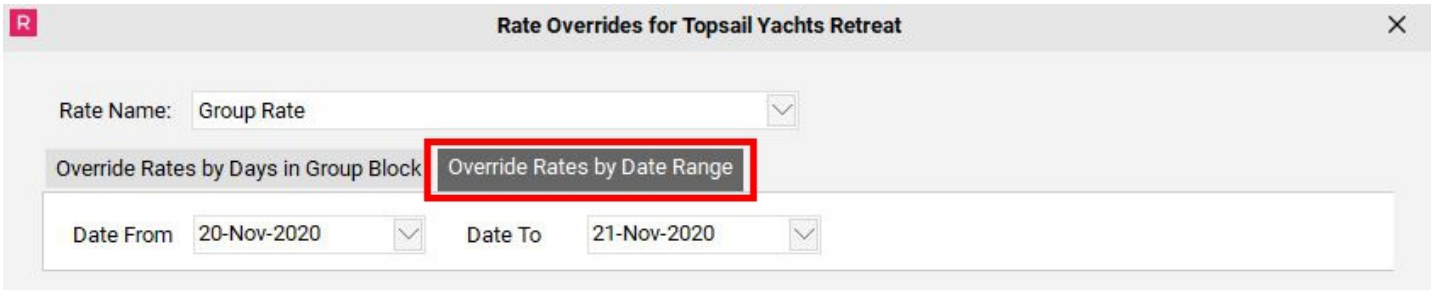


The **Rates Currently Set** at the bottom of the Default Rate Override box will now reflect the rates that are set for this Group during its stay.

The **Remove Overrides** button will set rates back to their default value. NOTE: This will not change the rate on any pre-existing reservations for the group.



Option 2: In the **Override Rates by Date Range** tab, the **Date From & Date To** will automatically populate with the Group Dates (including Pre/Post Nights)



The next step is select the Dates for which you wish to override the rates, and input the new Rates into the Rate Template below. Select **Save** to implement these changes.

Rate Overrides for Topsail Yachts Retreat

Rate Name:

Override Rates by Days in Group Block ☐ Override Rates by Date Range ☒

Date From: Date To:

Room Type	Single:	Double:	Triple:	Quad:	Extra:	Child:
<input checked="" type="checkbox"/> SQQ	90	90	90	90	0.00	0.00
<input checked="" type="checkbox"/> SK	\$90.00	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> DQQ	\$90.00	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> DK	\$90.00	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> EKS	\$90.00	\$90.00	\$90.00	\$90.00	\$0.00	\$0.00

Remove Overrides

Rates Currently Set :

Room Type	Fri Nov 20	Sat Nov 21
> SQQ	\$100.00	\$100.00
SK	\$100.00	\$100.00
DQQ	\$100.00	\$100.00
DK	\$100.00	\$100.00
EKS	\$100.00	\$100.00
PHV	\$925.00	\$925.00
PHS	\$440.00	\$440.00

The Rates Currently Set at the bottom of the Default Rate Override box will now reflect the rates that are set for this Group during its stay.

IMPORTANT NOTE: *You can override rates at any time, even after a group has been created. However, if you have reservations already created for the group before overriding the rates, the pre-existing reservations rates will not change. Only new reservations created will show the updated rate, any existing reservations will need to be manually updated one by one.*

Remove Overrides

Rates Currently Set :

Room Type	Fri Nov 20	Sat Nov 21
> SQQ	\$90.00	\$100.00
SK	\$90.00	\$100.00
DQQ	\$90.00	\$100.00
DK	\$90.00	\$100.00
EKS	\$90.00	\$100.00

Setting a new Default Rate for an individual Room Type

If more than one Rate Plan was attached to the Group, you can change the Default Rate for an individual Room Type if you wish by using the bottom section of the Rates tab.

1. Select the desired **Room Type**
2. Use the **Default Rate** drop down menu at the bottom of the screen to choose the desired Default Rate
3. Click **Post** to save

The screenshot displays a web interface for managing room types and rates. At the top left, a 'Room Type' dropdown menu is highlighted with a red box and a circled '1'. Below it, the 'Manual Rate' section shows input fields for 'Single', 'Double', 'Triple', 'Quad', 'Extra', and 'Child'. To the right, the 'Attached Rates' section contains a list of rates: 'Manual Rate', 'Romantic Rendez-Vous Package', and 'Group Rate'. Below this list, a 'Default Rate' dropdown menu is highlighted with a red box and a circled '2'. In the center, a 'Post' button is highlighted with a red box and a circled '3'. To the right of the 'Post' button is a 'Cancel' button. On the far right, the 'Available Rates' section lists various rate plans, including '*Best Available Rate', '*Best Available Rate / GDS', '*Best Available Rate / Hotel Website', '*th Night Free!', 'AA/CAA Rate', 'AAA/CAA Rate / GDS', 'AAA/CAA Rate / Hotel Website', 'AARP Rates', 'AARP Rates / GDS', 'AARP Rates / Hotel Website', 'ABC Company', 'ABC Company / Hotel Website', and 'Advanced Purchase Rate'. At the bottom left, the text 'Group: Topsail Yachts Retreat' is visible.

Manually attaching a Rate Plan to an individual Room Type

It is possible to manually attach an individual Rate Plan to an individual Room Type.

1. Choose the **Room Type** from the drop down
2. Select the Rate Plan under the **Available Rates**
3. Use the < arrow to move it to the **Attached Rates** side

Rates should be assigned to ALL room types, even if the room type is not included in the group block. This allows flexibility in the event that a guest needs to be moved to a room outside of the group block, ensuring there is a "Group Rate" available on that room type. Doing this will also allow any room used "outside" of the group block to still be reported on as part of the group.

Room Type: DK

Manual Rate

Single	Double	Triple	Quad	Extra	Child
100.00	100.00	130.00	160.00	\$30.00	

Attached Rates

- Manual Rate
- Romantic Rendez-Vous Package
- Group Rate

Available Rates

- *Best Available Rate
- *Best Available Rate / GDS
- *Best Available Rate / Hotel Website
- 4th Night Free!
- AAA/CAA Rate
- AAA/CAA Rate / GDS
- AAA/CAA Rate / Hotel Website
- AARP Rates
- AARP Rates / GDS
- AARP Rates / Hotel Website
- ABC Company
- ABC Company / Hotel Website**
- Advanced Purchase Rate

Default Rate: Manual Rate

Group: Topsail Yachts Retreat

Buttons: Post, Cancel

Creating a Manual Rate for a Group (not recommended)

If you wish to setup a Manual Rate:

1. Select the **Room Type** using Room Type drop down menu
2. Enter rates into the **Manual Rate** section (fill in all boxes, if any are left blank the rate will populate as \$0.00)
3. Select Manual Rate as your **Default Rate**
4. Click **Post** to save

These 4 steps must be repeated for each Room Type in the inventory, as this process only deals with one Room Type at a time.

The screenshot displays a hotel management system interface with several key sections:

- Room Type:** A dropdown menu set to "DK".
- Manual Rate Table:** A table with columns for Single, Double, Triple, Quad, Extra, and Child. The Single, Double, Triple, and Quad rates are all set to 100.00, and the Extra rate is set to \$30.00.
- Attached Rates:** A section with a link to "Manual Rate".
- Available Rates:** A list of various rate types including Booking.com Rate / Hotel Website, Corporate Preferred Rate, Corporate Preferred Rate / Hotel Website, Corporate Standard Rate, Corporate Standard Rate / GDS, Corporate Standard Rate / Hotel Website, Expedia Flash Sale Prepaid, Expedia Flash Sale Prepaid / GDS, Expedia Hotel Collect, Expedia Hotel Collect / GDS, Expedia Prepaid, and Expedia Prepaid / GDS. A "Group Rate" link is also present.
- Buttons:** "Post" and "Cancel" buttons are located below the Attached Rates section.
- Default Rate:** A dropdown menu set to "Manual Rate".
- Group:** The group name "Jones Family Reunion" is displayed at the bottom.

3. Block

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

In this 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
20-Nov-2020 ◄ Prev Next ► Refresh November ☒ Include Overbooking Limits ☒ REM Block Holds

Room Type	TOT	Avg Rate	Fri Nov 20					Sat Nov 21				
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE
> SQQ	9	\$95.00	9	0	0	0	\$90.00	9	0	0	0	\$100.00
SK	9	\$95.00	9	0	0	0	\$90.00	9	0	0	0	\$100.00
DQQ	6	\$95.00	6	0	0	0	\$90.00	6	0	0	0	\$100.00
DK	6	\$95.00	3	0	0	0	\$90.00	3	0	0	0	\$100.00
EKS	6	\$95.00	6	0	0	0	\$90.00	6	0	0	0	\$100.00
Total			33	0	0	0		33	0	0	0	
PROPERTY			31					31				

Edit Mode ☐ Enable overbooking ☐

Group: Topsail Yachts Retreat

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
20-Nov-2020 ◄ Prev Next ► Refresh November ☒ Include Overbooking Limits ☒ REM Block Holds

Room Type	TOT	Avg Rate	Fri Nov 20					Sat Nov 21				
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE
> SQQ	9	\$95.00	9	0	0	0	\$90.00	9	0	0	0	\$100.00
SK	9	\$95.00	9	0	0	0	\$90.00	9	0	0	0	\$100.00
DQQ	6	\$95.00	6	0	0	0	\$90.00	6	0	0	0	\$100.00
DK	6	\$95.00	3	0	0	0	\$90.00	3	0	0	0	\$100.00
EKS	6	\$95.00	6	0	0	0	\$90.00	6	0	0	0	\$100.00
Total			33	0	0	0		33	0	0	0	
PROPERTY			31					31				

Edit Mode ☐ Enable overbooking ☐

Group: Topsail Yachts Retreat

Entering the Block

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

R

Group Wizard

1. Primary2. Rates3. Block4. Guest Services5. Rooming List6. Check-In7. Check-Out8. Notes

Display For20-Nov-2020PrevNextRefreshNovemberInclude Overbooking LimitsREMBlock Holds

Room Type	TOT	Avg Rate	Fri Nov 20					Sat Nov 21				
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE
SQQ	9	\$95.00	9	3	0	0	\$90.00	9	3	0	0	\$100.00
SK	9	\$95.00	9	3	0	0	\$90.00	9	3	0	0	\$100.00
DQQ	6	\$95.00	6	1	0	0	\$90.00	6	1	0	0	\$100.00
DK	6	\$95.00	3	1	0	0	\$90.00	3	1	0	0	\$100.00
EKS	6	\$95.00	6	0	0	0	\$90.00	6	0	0	0	\$100.00
Total			33	0	0	0		33	0	0	0	
PROPERTY			31					31				

Enable overbooking

PostCancel

Group: Topsail Yachts Retreat

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
20-Nov-2020
Prev
Next
Refresh
November
Include Overbooking Limits
REM
Block Holds

Room Type	TOT	Avg Rate	Fri Nov 20					Sat Nov 21				
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE
> SQQ	9	\$95.00	6	3	0	3	\$90.00	6	3	0	3	\$100.00
SK	9	\$95.00	6	3	0	3	\$90.00	6	3	0	3	\$100.00
DQQ	6	\$95.00	5	1	0	1	\$90.00	5	1	0	1	\$100.00
DK	6	\$95.00	2	1	0	1	\$90.00	2	1	0	1	\$100.00
EKS	6	\$95.00	6	0	0	0	\$90.00	6	0	0	0	\$100.00
Total			25	8	0	8		25	8	0	8	
PROPERTY			23					23				

Edit Mode
Enable overbooking

Group: Topsail Yachts Retreat

Block Holds

If a group will be in house for a longer period of time, it may be easier to use the **Block Holds** feature. The Block Holds feature allows a fixed number of rooms to be held for a specific period of time.

Click **Block Holds** to open the module

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

Display For: 20-Nov-2020 ◄ Prev Next ► Refresh November ☒ Include Overbooking Limits ☒ REM Block Holds

Room Type	TOT	Avg Rate	Fri Nov 20					Sat Nov 21				
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE
> SQQ	9	\$95.00	6	3	0	3	\$90.00	6	3	0	3	\$100.00
SK	9	\$95.00	6	3	0	3	\$90.00	6	3	0	3	\$100.00
DQQ	6	\$95.00	5	1	0	1	\$90.00	5	1	0	1	\$100.00
DK	6	\$95.00	2	1	0	1	\$90.00	2	1	0	1	\$100.00
EKS	6	\$95.00	6	0	0	0	\$90.00	6	0	0	0	\$100.00
Total			25	8	0	8		25	8	0	8	
PROPERTY			23					23				

Edit Mode ☐ Enable overbooking ☐

Group: Topsail Yachts Retreat

With **Block Holds** open, click **Amendment** at the bottom to begin entering the block.

R
Block Holds
✕

Room Type	Date From	Date To	Holds
> DK	20-Nov-2020	21-Nov-2020	0
DQQ	20-Nov-2020	21-Nov-2020	0
EKS	20-Nov-2020	21-Nov-2020	0
SK	20-Nov-2020	21-Nov-2020	0
SQQ	20-Nov-2020	21-Nov-2020	0

Amendment

Click **Insert** to add specific Room Types to the block

OR

Click **Insert All** to add all Room Types to the block

R

Block Amendments (20-Nov-2020 - 21-Nov-2020)

X

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
> SQQ-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override
SK-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override
DQQ-	20-Nov-2020	21-Nov-2020	1	RSI ADMIN	27-May-202...	Hold Override
DK-	20-Nov-2020	21-Nov-2020	1	RSI ADMIN	27-May-202...	Hold Override
SQQ-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
SK-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
DQQ-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
DK-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override

Insert

Insert All

Apply As

Hold Override

In this example, we are clicking **Insert** to add Room Types to the block, one at a time. Click the drop down menu under **Room Type** to add a Room Type to the block.

R

Block Amendments (20-Nov-2020 - 21-Nov-2020)

X

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
> SQQ-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override
SK-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override
DQQ-	20-Nov-2020	21-Nov-2020	1	RSI ADMIN	27-May-202...	Hold Override
DK-	20-Nov-2020	21-Nov-2020	1	RSI ADMIN	27-May-202...	Hold Override
SQQ-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
SK-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
DQQ-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override

Room Type

> DK

DK
DQQ
EKS
SK
SQQ

Insert

Delete

Insert All

Apply As

Hold Override

Enable overbooking ☐

Post

Cancel

Enable overbooking ☐

Retreat

- With the correct Room Type selected, choose the desired **Date From** and **Date To**, and the number of rooms to hold for that period under **Holds**.

- Click **Post** to save

Repeat this process for any other Room Types that need to be added to the block.

Block Amendments (20-Nov-2020 - 21-Nov-2020)

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
> SQQ-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override
SK-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override
DQQ-	20-Nov-2020	21-Nov-2020	1	RSI ADMIN	27-May-202...	Hold Override
DK-	20-Nov-2020	21-Nov-2020	1	RSI ADMIN	27-May-202...	Hold Override
SQQ-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
SK-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
DQQ-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override

Room Type	Date From	Date To	Holds	Created By	Created On
SQQ	20-Nov-2020	21-Nov-2020	3	ADMIN, RSI	27-May-2020

☐ Enable overbooking

Enable overbooking ☐

Once all Room Types and Blocks have been added, we can see them listed in the **Block Amendments** main screen.

Block Amendments (20-Nov-2020 - 21-Nov-2020)

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
> SQQ-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override
SK-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override
DQQ-	20-Nov-2020	21-Nov-2020	1	RSI ADMIN	27-May-202...	Hold Override
DK-	20-Nov-2020	21-Nov-2020	1	RSI ADMIN	27-May-202...	Hold Override
SQQ-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
SK-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
DQQ-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
DK-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
SQQ-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override

Amending the Block

On occasion, the original block totals may need to be amended at a later time, either adding to, or decreasing the holds. There are two options available in the **Block Holds** screen; **Hold Override**, and **Availability**.

To understand how these options work, consider this. We have 1 room in block, and it has been picked up, so our remaining block is now 0.

- **Hold Override** - Using this option, we enter 5 rooms. This means the block is now 5 in total, the pickup is 1, and the remaining block is now 4. *(Overrides the original block numbers. Any picked up rooms will be included in the new block and deducted from the total).*
- **Availability** - Using this option, we enter 5 rooms. They add on to the original block of 1 room, creating a block of 6. Because the original 1 room was picked up, we are now left with a remaining block of 5. *(Adds on to the original block. Any picked up rooms are added to the new block total).*

Block Amendments (20-Nov-2020 - 21-Nov-2020)

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
SQ-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override
SK-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override
DQ-	20-Nov-2020	21-Nov-2020	1	RSI ADMIN	27-May-202...	Hold Override
DK-	20-Nov-2020	21-Nov-2020	1	RSI ADMIN	27-May-202...	Hold Override
SQ-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
SK-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
DQ-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
DK-	20-Nov-2020	21-Nov-2020	0	RSI ADMIN	27-May-202...	Hold Override
SQ-	20-Nov-2020	21-Nov-2020	3	RSI ADMIN	27-May-202...	Hold Override

Insert

Insert All

Apply As

Hold Override

Hold Override

Availability

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
20-Nov-2020 ◄ Prev Next ► Refresh November ☒ Include Overbooking Limits ☒ REM Block Holds

Room Type	TOT	Avg Rate	Fri Nov 20					Sat Nov 21				
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE
> SQQ	9	\$95.00	6	3	0	3	\$90.00	6	3	0	3	\$100.00
SK	9	\$95.00	6	3	0	3	\$90.00	6	3	0	3	\$100.00
DQQ	6	\$95.00	6	0	0	0	\$90.00	6	0	0	0	\$100.00
DK	6	\$95.00	3	0	0	0	\$90.00	3	0	0	0	\$100.00
EKS	6	\$95.00	6	0	0	0	\$90.00	6	0	0	0	\$100.00
Total			27	6	0	6		27	6	0	6	
PROPERTY			25					25				

Edit Mode ☐ Enable overbooking ☐

Group: Topsail Yachts Retreat

4. Guest Services (if applicable)

The Guest Services section allows you to pre-add Guest Services offered to guests with a group. Any services added here will be automatically added to all rooms picked up out of this group block.

Available services will be displayed on the right side of the screen. The **Grouping** pull down menu can be used to view specific Guest Service groupings. To attach a Guest Service to a Group follow these steps:

- Select the guest service you wish to add (ensure the black arrow is pointing towards the desired guest service)
- Click the **Include** button to move the selected service from the right side of the screen to the left. The left side is a listing of the services attached to this group
- If a service needs to be detached from the group, click the **Revoke** button to move it back to the right side

Group Wizard

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

Grouping: [v]

Name	Price
Airport Transfer	
> Breakfast per Person	\$10.00
Chocolate Covered Strawberries	
Early Check-In Request	
Extra Towels	
High Floor Request	
High Floor Request	
Hypoallergenic Bedding	
Late Check-Out Request	
Overnight Parking	\$10.00
Package 25 Minute Massage	\$95.00
Package Breakfast per person	\$10.00
Package Champagne & Chocolates	\$20.00
Pet In Room	\$10.00
Rollaway Bed in Room	
Specific Room # Requested	
Valet Parking	\$20.00

← Add

Remove →

Post

Cancel

Group: Topsail Yachts Retreat

Once all desired Guest Services have been selected click on the **Post** button to save your changes.

For groups with individual pick up (guests are calling in to make reservations and are not entered via the Rooming List), these guest services will automatically attach to all reservations made for this group block. There is an option to manually remove the guest services from a reservation if they do not apply to a specific guest.

Group Wizard

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

Grouping

Name	Price
> Breakfast per Person	\$10.00

← Add

Remove →

Post

Cancel

Group: Topsail Yachts Retreat

Name	Price
Airport Transfer	
> Breakfast per Person	\$10.00
Chocolate Covered Strawberries	
Early Check-In Request	
Extra Towels	
High Floor Request	
High Floor Request	
Hypoallergenic Bedding	
Late Check-Out Request	
Overnight Parking	\$10.00
Package 25 Minute Massage	\$95.00
Package Breakfast per person	\$10.00
Package Champagne & Chocolates	\$20.00
Pet In Room	\$10.00
Rollaway Bed in Room	
Specific Room # Requested	
Valet Parking	\$20.00

For groups with a Rooming List, you will have an option in the “Rooming List” section to identify which guests will have the guest services noted on their reservations.

NOTE: You may alter the price of a guest service by typing the new amount into the **Price** column and selecting **Post** to save the change.

Group Wizard

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

Grouping

Name	Price
Breakfast per Person	8

← Add

Remove →

Post

Cancel

Group: Topsail Yachts Retreat

Name	Price
Airport Transfer	
> Breakfast per Person	\$10.00
Chocolate Covered Strawberries	
Early Check-In Request	
Extra Towels	
High Floor Request	
High Floor Request	
Hypoallergenic Bedding	
Late Check-Out Request	
Overnight Parking	\$10.00
Package 25 Minute Massage	\$95.00
Package Breakfast per person	\$10.00
Package Champagne & Chocolates	\$20.00
Pet In Room	\$10.00
Rollaway Bed in Room	
Specific Room # Requested	
Valet Parking	\$20.00

5. Rooming List (if applicable)

Proceed to the **Rooming List** tab of the Group Wizard.

NOTE: A rooming list may be entered at the same time the group is being created, however once the rates and block are set for the group, you will need to close the Group Wizard and re-open it again before proceeding with entering the Rooming List, in order for the rates to properly load.

1. Primary2. Rates3. Block4. Guest Services5. Rooming List6. Check-In7. Check-Out8. Notes

	Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
>	<input type="checkbox"/> SK										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> SK										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> SK										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> SQQ										<input type="checkbox"/>	<input type="checkbox"/>	

RefreshClearAssign all RoomsChange Res.Add Note

Group: Topsail Yachts Retreat

The rooming list section shows all of the rooms that are blocked for a group.

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

	Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
<input type="checkbox"/>	SK	New	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SK										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	

Refresh Clear Assign all Rooms Change Res. Add Note Enable overbooking ☐ Post Cancel

Group: Topsail Yachts Retreat

To enter a guest name into the Rooming List area, click on the First Name field and enter the guests first name and then click (or tab) to the Last Name field and enter the guest's last name.

NOTE: THE VARIOUS ROOM TYPES OFFERED ARE INDICATED UNDER THE "ROOM TYPE" COLUMN. ENSURE THAT YOU ARE SELECTING THE CORRECT ROOM TYPE FOR THE GUEST NAME BEING ENTERED.

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

	Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
<input type="checkbox"/>	SK	New	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
> <input type="checkbox"/>	SK	New	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	

Refresh Clear Assign all Rooms Change Res. Add Note Enable overbooking ☐ Post Cancel

Group: Topsail Yachts Retreat

After the first & last name are entered the arrival date, nights, adults, children and rate will automatically populate. If any of these fields need to be adjusted, simply click on the field. A drop down menu will appear for the arrival date & rate, while arrows will appear allowing you to increase or decrease the number of nights, adults or children in the room.

Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child	Room #	Rate	Routed	G. Srv	F. No.
<input type="checkbox"/> SK	New	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input checked="" type="checkbox"/> SK	New	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SK										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> SQQ										<input type="checkbox"/>	<input type="checkbox"/>	

Refresh Clear Assign all Rooms Change Res. Add Note Enable overbooking ☐ Post Cancel

Group: Topsail Yachts Retreat

The last 3 columns located in the Rooming List Section are **Routed**, Guest Services (**G. Srv**) and Folio Number (**F. No**).

- **Routed** – the routed field is associated with groups that have billing to a House Account. When group has billing set up to go to a House Account this box will be CHECKED to indicate that the reservation's charges will be "routed" to the house account upon check-out. If you do not want a reservation to have its charges routed to the house account upon check-out, then you would simply un-check this box and hit POST.
- **Guest Services (G. Srv)** – if this box is checked then the guest reservation will include the guest services selected under the "Guest Services" section. This must be checked at the time of entering the name into the Rooming List. To add or delete guest services AFTER a reservation is created, right click on the reservation and select the "Update Guest Services" option which would allow us to add or delete guest services from within the Group Wizard.
- **Folio Number (F. No)** – the folio number indicated here will be the same folio number selected under the "Contacts & Billing Info Tab". Typically when billing is set to go to a House Account or a City Account then the folio will automatically populate with "8". If there are some reservations that will be responsible for their own charges then you may change the "8" to a "1" to indicate that all charges are to the individual.

Once all the names have been entered into the Rooming List with all the appropriate information, click the **Post** button. Once clicked, the guest reservations will be created according to the information entered.

NOTE: When looking at the **Res ID** column, if there is Res ID number present, it indicates an existing reservation for this group. Reservations that are in the process of being entered will display "New" under the Res ID column, until the **Post** button is clicked to save them.

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

	Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
<input type="checkbox"/>	SK	1052	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK	1051	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK	New	Elsie	Garner	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input checked="" type="checkbox"/>	SQQ	New	Richard	Goode	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	

Refresh
Clear
Assign all Rooms
Change Res.
Add Note
Enable overbooking ☐
Post
Cancel

Group: Topsail Yachts Retreat

Once the reservations are created, their **Res ID** numbers will appear in the **Res ID** column.

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

	Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
<input checked="" type="checkbox"/>	SK	1052	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK	1051	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK	1054	Elsie	Garner	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SQQ	1053	Richard	Goode	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	

Refresh
Clear
Assign all Rooms
Change Res.
Add Note

Group: Topsail Yachts Retreat

Copy & Past Method

TIP: Another option when entering a Rooming List is to create all the reservations under the same name, which could then be changed out to the actual guest name at a later date. To simplify this process, we can use the "Copy & Paste" function.

First, enter the name that is to appear on all the reservations (do not hit **Post** at this time). Next, highlight the first name, right click and select "**Copy**".

1. Primary2. Rates3. Block4. Guest Services5. Rooming List6. Check-In7. Check-Out8. Notes

	Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
<input type="checkbox"/>	SK	1052	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input checked="" type="checkbox"/>	SK	1051	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK	1054	Elsie		20	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SQQ	1053	Richard		20	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	

ClearCopyPastePaste allChangeChange Selected ItemsSelect Alldeselect AllUpdate Guest ServicesLoad from file

RefreshClearAssign all RoomsChange Res.Add Note

Group: Topsail Yachts Retreat

Click on the next empty cell under **First Name**, right click and select "**Paste all**".

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

	Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
<input type="checkbox"/>	SK	1052	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK	1051	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK	1054	Elsie	Garner	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SQQ	1053	Richard	Goode	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
> <input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	SQQ										<input type="checkbox"/>	<input type="checkbox"/>	

Clear
Copy
Paste
Paste all
Change
Change Selected Items
Select All
deSelect All
Update Guest Services
Load from file

Refresh
Clear
Assign all Rooms
Change Res.
Add Note

Group: Topsail Yachts Retreat

The entire Rooming List will now be populated with the exact same guest reservation details for each room. The **Arrival Date, Nights, Adults, Children & Rate** may be altered at this time.

Click **Post** to save changes and create the reservations.

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

	Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
<input type="checkbox"/>	SK	1052	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK	1051	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SK	1054	Elsie	Garner	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SQQ	1053	Richard	Goode	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	SQQ	New	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
> <input type="checkbox"/>	SQQ	New	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8


Refresh
Clear
Assign all Rooms
Change Res.
Add Note

Group: Topsail Yachts Retreat

Enable overbooking ☐
Post
Cancel

Shares

After a reservation is created, if you need to add a Guest Share Name to a reservation, you can double click on the corresponding empty box under the Share column (this column is identified by a two head icon).

1. Primary 2. Rates 3. Block 4. Guest Services 5. Rooming List 6. Check-In 7. Check-Out 8. Notes															
	Room Type	↓		Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
>	<input type="checkbox"/> SK			1052	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SK			1051	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SK			1054	Elsie	Garner	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SQQ			1053	Richard	Goode	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SQQ			New	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SQQ			New	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8

1. Double click the box under the **Share** column to open the **Shares** box
2. Select the "Ins" (insert) button to add a Share Name

1. Primary	2. Rates	3. Block	4. Guest Services	5. Rooming List	6. Check-In	7. Check-Out	8. Notes							
Room Type	↓	👤	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
> <input type="checkbox"/> SK			1052	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SK			1051	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SK											Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SQQ											Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SQQ											Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SQQ											Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8

Shares for Res ID: 1052

First Name	Last Name	Use Folio	Folio	Store As Guest	Master	Closed	Created	Created By
> Thomas	Edwards	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	27-May-2020 01:05 PM	RSI ADMIN

Ins

Del

Edit

Folio

Close

Refresh

Clear

Assign all Rooms

Change Res.

Add Note

Enable overbooking ☐

Post

Cancel

Group: Topsail Yachts Retreat

Proceed to enter the Share information:

- **First Name/Last Name** - enter the first/last name of the guest share

- **Use Folio** - check this box if you wish for the share guest to have their own Folio # for charges
- **Store As Guest** - check this box if you wish to store a Guest Profile for the Guest Share (You can also use this option to search for an existing profile)
- **Split Room Charges Equally** - check this box if you wish for Room Charges to be split equally among all Guest Shares upon check-out.

Select **Post** to save changes.


Shares for Res ID: 1052

First Name	Last Name	Use Folio	Folio	Store As Guest	Master	Closed	Created	Created By
> Angela	Edwards	<input checked="" type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Thomas	Edwards	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	27-May-2020 01:05 PM	RSI ADMIN

☒ Split Room Charges Equally

After a share has been added to a reservation - a two head icon will appear under the Share column to show that this reservation has a Guest Share.

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

Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child.	Room #	Rate	Routed	G. Srv.	F. No.
> <input type="checkbox"/> SK	 1052	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SK	1051	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SK	1054	Elsie	Garner	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SQQ	1053	Richard	Goode	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SQQ	New	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SQQ	New	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8

☐ Enable overbooking

Group: Topsail Yachts Retreat

Other Rooming List Functions

Other functions within the Rooming List section are:

- **Assign All Rooms** – pressing this button will automatically assign room numbers to the reservations found in the Rooming List. You can also manually choose room numbers or change the auto assigned room numbers by using the drop-down list in the **Room #** column.
- **Change Res** - button allows us to change the details of the selected reservation within the Rooming List. Clicking this button will open the Modify Reservation Screen. (This feature can also be accessed by right clicking on a name in the Rooming List and selecting **Change**)
- **Add Note** – allows you to add Reservation Notes to a reservation found in the rooming list.
NOTE: In the bottom left hand corner of the notes box you have the option to check the "**Copy to all reservations**" box, which will copy the note to all reservations within the Rooming List.

The screenshot shows the 'Group Wizard' interface with the '5. Rooming List' tab selected. The table below lists reservations with columns for Room Type, Res ID, First Name, Last Name, Arrival, Nights, Adults, Child, Room #, Rate, Routed, G. Srv., and F. No. Below the table, there are buttons for 'Refresh', 'Clear', 'Assign all Rooms', 'Change Res.', and 'Add Note'. The 'Assign all Rooms' button is highlighted with a red box. At the bottom left, it says 'Group: Topsail Yachts Retreat'.

Room Type	Res ID	First Name	Last Name	Arrival	Nights	Adults	Child	Room #	Rate	Routed	G. Srv.	F. No.
SK	1052	Thomas	Edwards	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
SK	1051	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
SK	1054	Elsie	Garner	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
SQQ	1053	Richard	Goode	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
SQQ	New	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
SQQ	New	Margaret	Kennedy	20-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8

Buttons: Refresh, Clear, **Assign all Rooms**, Change Res., Add Note

Enable overbooking ☐ Post Cancel

Group: Topsail Yachts Retreat

8. Notes (if applicable)

The **Notes** tab is an area where internal notes about the group can be recorded. Anything entered in this area will not print out on any guest confirmations or folios.

TIP: A Group cannot be canceled if there are notes in the Notes tab. If you receive the following error message when trying to cancel a group, simply delete the notes found in the notes section and then proceed with the cancellation.

"THE DELETE STATEMENT CONFLICTED WITH THE REFERENCE CONSTRAINT
"FK_GROUP_MEMOS_GROUPS". THE CONFLICT OCCURRED IN DATABASE "BNBEAST", TABLE
"DBO.GROUP_MEMOS"."

To add notes to the Group Wizard:

1. Click **Insert**
2. Type note into the blank field on the right
3. Click **Post** to save the note

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

Created On	Created By
27-May-2020	ADMIN, RSI

1

Insert Delete

Group: Topsail Yachts Retreat

2

All rooms to be released 5 days prior to group arrival.

3

Post Cancel

Wrapping up

You have now finished entering your Group. Select the **red X** located in the top right hand corner of your screen to exit the Group Wizard.

Group Wizard

Rooming List 6. Check-In 7. Check-Out 8. Notes

All rooms to be released 5 days prior to group arrival.

X

Once your Group has been created it will now appear in your **Group Master** List

R

Group Master

X

View

Reports

Name	Group ID	City Account	Arrival Date	Departure Date	Block Type	Cut-off Date	Tag
Jones Family Reunion	JFR102320		23-Oct-2020	25-Oct-2020	Solid	23-Oct-2020	
> Topsail Yachts Retreat	TYR112020	Topsail Yachts	20-Nov-2020	22-Nov-2020	Solid	20-Nov-2020	

New

Copy

Open

View Res.

Group Details

Group Pickup

eRes Page

Cancel Group

Close