

How to Create a Group with Billing to a House Account

A House (or Master) Account is used when a group wants to take care of some or all charges for their group and they wish to [settle the bill at time of Check-Out](#). A House Account bill will not show the names of the individual guests whom the charges are associated with, but instead will show the RES ID number associated with that guestroom.

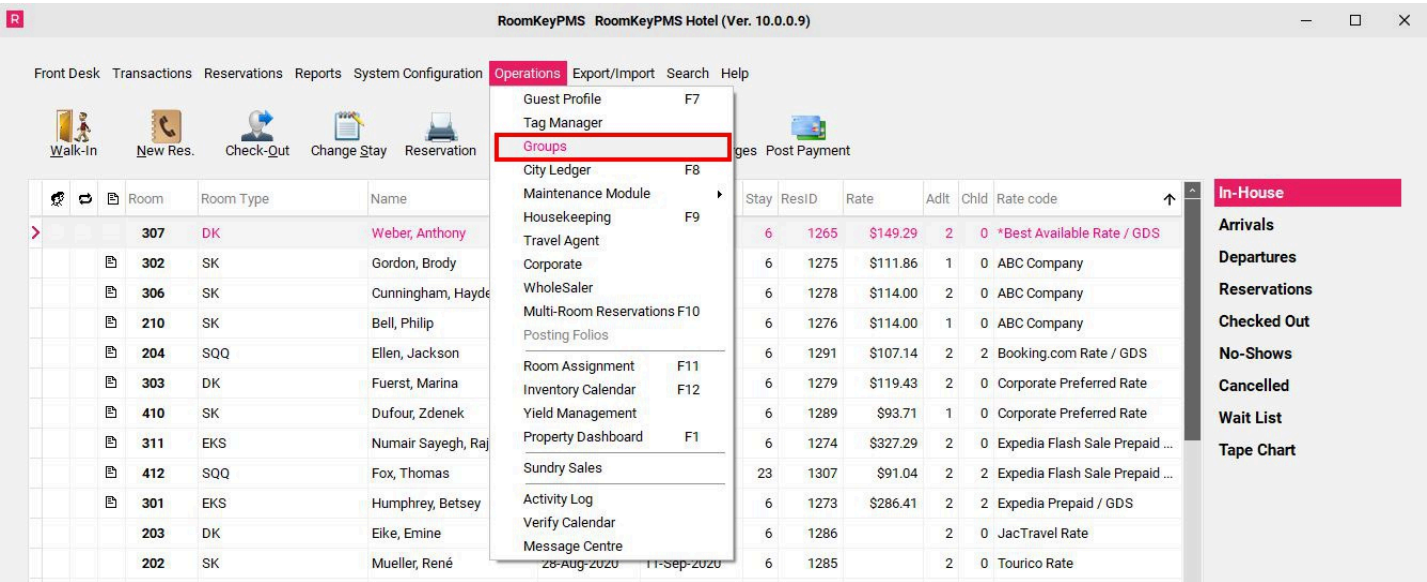
Routing of any charges to a House Account (or City Ledger Account) will not take place until check-out. The charges will remain on Folio 8 of the guestroom until check-out, at which point they will be transferred to the appropriate account.

If you do not already have House Accounts set up in the PMS, please consult the article [How to Create House Accounts](#) for more information.

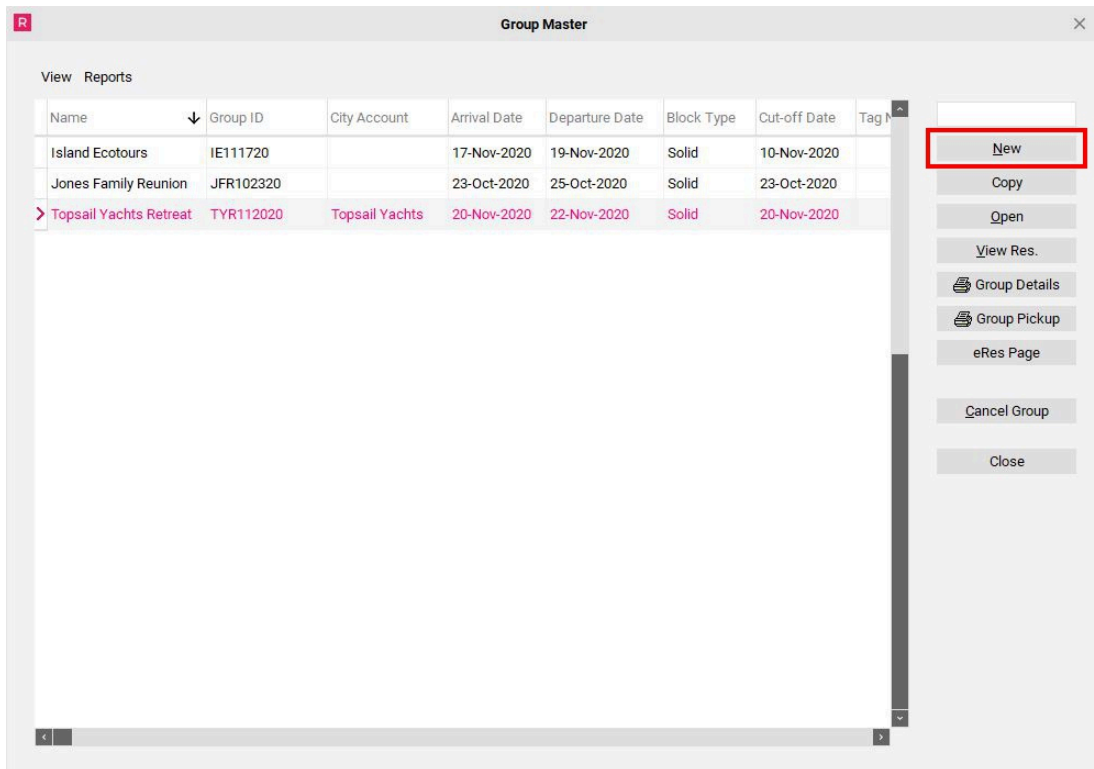
Click below to view step-by-step instructions:

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.



1. Primary

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

The screenshot shows the 'Group Wizard' window. It has a tabbed interface with tabs: '1. Primary', '2. Rates', '3. Block', '4. Guest Services', '5. Rooming List', '6. Check-In', '7. Check-Out', and '8. Notes'. The '1. Primary' tab is selected, and within it, the 'General' sub-tab is highlighted with a red box. The 'General' sub-tab contains various input fields for group information, including Name, Group ID, Client type, Room Charge Code, Arrival Date, Nights, Departure Date, C/O Time, Cut-off Days, Cut-off Type, Block Type, Source of Business, Attach Note, and an Active checkbox. At the bottom, there is an 'Enable overbooking' checkbox and 'Post' and 'Cancel' buttons.

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")

Group Wizard

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

Name: Island Ecotours

Group ID: IE111720 (A unique ID for your group)

Client type: GROUP

Room Charge Code: RCH

Arrival Date: 17-Nov-2020 Nights: 2

Departure Date: 19-Nov-2020 C/O Time: 11:00

☐ Guests can arrive and depart outside of the block

0 Days Before 0 Days After

Active ☒

Cut-off Days: 7

Cut-off Type: Whole Block

Block Type: Solid

Source of Business: Group Block

Attach Note: Room & Tax and Breakfast to the Master Account. All other incidentals to the individual.

Group: Island Ecotours

Contact & Billing tab

- **Folio Number** - Use the drop down menu to select folio number **8**. When room & tax is to be billed to a House Account the folio number **MUST** be set to 8.
- **Bill to City Account** - DO NOT input any information into the "Bill to City Account" area.
- **Apply to existing reservations** - you need only check this box when you are changing billing on 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.
- **Address information** - fill in the contact information for this group

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

Group Wizard

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

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

~~Bill to city account ☒ Bill To ☐ Create a new account~~

~~Credit limit ☐ Use account to fill up address~~

Address 3968 Barnes Street Contact Elijah Lincoln

Zip 32822 Phone 407-275-4441

City Orlando Email elijah@islandeco.com

Country United States Fax

State Florida Tag

Sales Manager

Group: Island Ecotours

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.

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

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

Bill to city account 1 Bill To ☐ Create a new account

Credit limit 0 ☐ Use account to fill up address

Routing / Deposit tab

Next, proceed to the **Routing/Deposit** tab.

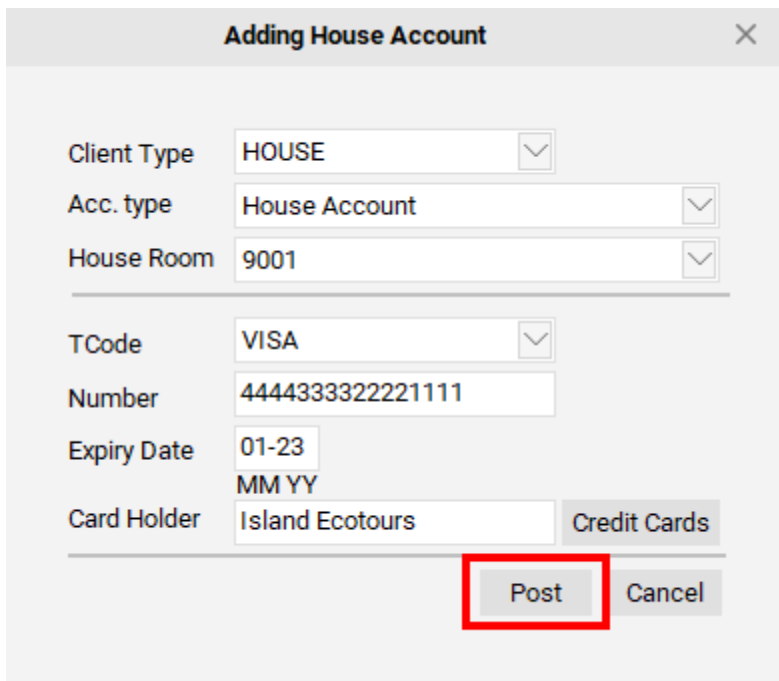
Click on the **Add House Account** button to add a House Account which will be used for billing

The screenshot shows the 'Group Wizard' application window. At the top, there are tabs for '1. Primary', '2. Rates', '3. Block', '4. Guest Services', '5. Rooming List', '6. Check-In', '7. Check-Out', and '8. Notes'. Below these are sub-tabs: 'General', 'Contact & Billing Info', 'Travel Agent', and 'Routing / Deposit'. The 'Routing / Deposit' tab is selected and highlighted with a red box. Inside this tab, there is a section titled 'House Accounts' containing a table with columns 'Res. ID', 'Room #', and 'Status'. To the right of this table is a vertical list of buttons: 'Add House Account' (highlighted with a red box), 'Cancel', 'Check in', 'Change', and 'Deposit'. Below the 'House Accounts' section is a form for adding a new account. It includes fields for 'Transaction Group', 'Transaction Code', 'Description', 'Folio Number', and 'Amount' (with a 'Percentage' checkbox). At the bottom of this form are 'Add', 'Update', and 'Delete' buttons. To the right of the form is another table with columns 'Transaction Group', 'Transaction', 'Folio', 'Amount', and '%'. At the bottom right of the window are 'Post' and 'Cancel' buttons.

Adding a House Account

The following box will appear.

- Select the Client Type (House Account),
- Select the Acc. Type (House Account)
- Choose the House Room # which will be used.
- If the group provided you with a credit card number you would input the information here, although a credit card is not necessary to create a House Account.
- When finished hit the **Post** button.



Adding House Account [X]

Client Type: HOUSE

Acc. type: House Account

House Room: 9001

TCode: VISA

Number: 4444333322221111

Expiry Date: 01-23
MM YY

Card Holder: Island Ecotours Credit Cards

Post Cancel

Once you select **Post**, the House Room will appear under the House Accounts section and will be assigned a RES ID number. This means that the House Account for this Group has now been created. The next step will be to setup which charges will be billed to the House Account.

IMPORTANT NOTE:

- The arrival and departure dates of the House Account's reservation will be based upon the group's dates, including any pre & post nights.
- The House Account *must be checked in before* the group's check-out date, otherwise any charges that were routed to it will not transfer at check-out.
- Only selected charges will automatically transfer to the House Account at the time of check-out.

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Group Wizard

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		
> 1326	9001	Not In House

Add House Account

Cancel

Check in

Change

Deposit

Transaction Group

Transaction Code

Description

Folio Number

Amount 0.00

Percentage

Add

Update

Delete

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

Post

Cancel

Group: Island Ecotours

Routing Charges

To setup which charges will be transferred to the House Account upon check-out, first, make sure the black arrow under the House Accounts section is pointing towards the House Account.

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Group Wizard

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		
> 1326	9001	Not In House

Add House Account

Cancel

Check in

Change

Deposit

Transaction Group

Transaction Code

Description

Folio Number

Amount 0.00

Percentage

Add

Update

Delete

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

Post

Cancel

Group: Island Ecotours

In this example Room & Tax as well as Breakfast are to be billed to the House Account. Use the drop down menus to select the charges that you wish to transfer to the House Account upon check-out.

- **Transaction Group** – select the Transaction Group where the desired Transaction Code is located (ie: Room Charge)
- **Transaction Code** – select the Transaction Code you wish to route to folio 8 (ie: RCH is the Room Charge Code being used for this group)
- **Folio** – select Folio 8

Once the proper code has been selected, hit the **Add** button.

The screenshot shows the 'Group Wizard' window with the 'Routing / Deposit' tab selected. The 'House Accounts' table lists a room with ID 1326 and room number 9001, which is 'Not In House'. Below this, the 'Transaction Group' is set to 'Room Charge', 'Transaction Code' is 'RCH', and 'Folio Number' is '8'. The 'Amount' is '0.00' and the 'Percentage' checkbox is unchecked. The 'Add' button is highlighted with a red box. To the right, a table for routing instructions is visible, with columns for Transaction Group, Transaction, Folio, Amount, and %.

Res. ID	Room #	Status
0		
1326	9001	Not In House

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

Once added, the routing instructions will appear in the window to the right.

Group Wizard

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		
> 1326	9001	Not In House

Add House Account
Cancel
Check in
Change
Deposit

Transaction Group: Room Charge
Transaction Code: RCH
Description: Room Charge
Folio Number: 8
Amount: 0.00 ☐ Percentage

Add Update Delete

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

Post Cancel

Group: Island Ecotours

If you have other charges that you wish to transfer to the House Account upon check-out, repeat the last two steps until all charges are listed in the window to the right. Once done, click the **Post** button to save.

In the below example, the group is now set up to have Room & Tax, and Overnight Parking routed to the House Account.

Group Wizard

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		
> 1326	9001	Not In House

Add House Account
Cancel
Check in
Change
Deposit

Transaction Group: Other Charge
Transaction Code: PRK-NT
Description: Overnight Parking
Folio Number: 8
Amount: 0.00 ☐ Percentage

Add Update Delete

Transaction Group	Transaction	Folio	Amount	%
Room Charge	RCH	8	\$0.00	<input type="checkbox"/>
> Other Charge	PRK-NT	8	\$0.00	<input type="checkbox"/>

Post Cancel

Group: Island Ecotours

Things to remember about Groups with House Account Billing

- Under the "Contacts and Billing Info" tab, the Folio Number must be set to 8 AND must not have any information filled into the "Bill to City Account" field
- Room & Tax as well as any "Other Charges" (incidentals) may be billed to a House Account
- The House Account must be checked in for the Routing to take place upon checkout
- The House Account should be settled by the Group Coordinator on the day of departure
- The Group Folio will not show individual guest names. It will show Res ID's where the charges were routed from
- Any guests that do not have their charges routed to the House Account must have their **Routed** box unchecked, and their Folio number for billing changed to Folio 1 on the **Rooming List** tab. (Please see the article [How to Create a Group Reservation using the Group Rooming List](#) for more information on this)

Travel Agent (if applicable)

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**.

Group Wizard

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 ABC Travel Agency IATA 010123

Contact

Override commission % Default commission: 10 %

Post Cancel

Group: Island Ecotours

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.

2. Rates

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.

Attaching Rates to the Group

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
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.*

Create New Rate

General Client Types Corporates **Groups**

- ☒ Hotel Direct
 - ☒ Island Ecotours
 - ☒ Jones Family Reunion
 - ☒ Topsail Yachts Retreat
- ☒ Hotel Website
 - ☐ Island Ecotours
 - ☒ 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.

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 Attached Rates** 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.

The screenshot shows the 'Group Wizard' window with the 'Rates' tab selected. At the top, there are tabs for 1. Primary, 2. Rates, 3. Block, 4. Guest Services, 5. Rooming List, 6. Check-In, 7. Check-Out, and 8. Notes. Below the tabs, there's a section for 'Build Attach Rate Plans' with a 'Rate Wizard' button. To the right, there's a 'Group Default Rate' dropdown set to 'Group Rate' and a red-bordered button labeled 'Override Attached Rates'. Below this, there's a 'Room Type' dropdown set to 'DK' and a 'Manual Rate' section with input fields for Single, Double, Triple, Quad, Extra, and Child. The main area is divided into 'Attached Rates' and 'Available Rates'. 'Attached Rates' includes 'Manual Rate', 'Romantic Rendez-Vous Package', 'Group Rate' (selected with a red arrow), and 'Group Rate / Hotel Website'. 'Available Rates' includes '*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', and 'ABC Company / Hotel Website'. At the bottom, there's a 'Default Rate' dropdown set to 'Group Rate' and a label 'Group: Island Ecotours'.

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).

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.

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Rate Overrides for Island Ecotours

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Rate Name: Group Rate

Override Rates by Days in Group Block

Override Rates by Date Range

2 Day Main Group Block

☒ Tue Nov 17
☒ Wed Nov 18

Room Type	Single:	Double:	Triple:	Quad:	Extra:	Child:
	0.00	0.00	0.00	0.00	0.00	0.00
<input checked="" type="checkbox"/> SQQ	\$0.00	\$0.00	\$10.00	\$20.00	\$10.00	\$0.00
<input checked="" type="checkbox"/> SK	\$10.00	\$10.00	\$20.00	\$30.00	\$10.00	\$0.00
<input checked="" type="checkbox"/> DQQ	\$25.00	\$25.00	\$35.00	\$45.00	\$10.00	\$0.00
<input checked="" type="checkbox"/> DK	\$35.00	\$35.00	\$45.00	\$55.00	\$10.00	\$0.00
<input checked="" type="checkbox"/> EKS	\$235.00	\$235.00	\$245.00	\$255.00	\$10.00	\$0.00

Remove Overrides

Reset Grid

Save

Rates Currently Set :

Room Type	Tue Nov 17	Wed Nov 18
> SQQ	\$100.00	\$100.00
SK	\$110.00	\$110.00
DQQ	\$125.00	\$125.00
DK	\$135.00	\$135.00
EKS	\$335.00	\$335.00
PHV	\$900.00	\$900.00
PHS	\$415.00	\$415.00

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.*

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Rate Overrides for Island Ecotours

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Rate Name: Group Rate

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Override Rates by Days in Group Block

Override Rates by Date Range

2 Day Main Group Block

☒ Tue Nov 17
 ☒ Wed Nov 18

✓

Room Type	Single:	Double:	Triple:	Quad:	Extra:	Child:	
	89	89	89	89	0.00	0.00	
<input checked="" type="checkbox"/> SQQ		\$89.00	\$89.00	\$99.00	\$109.00	\$10.00	\$0.00
<input checked="" type="checkbox"/> SK		\$99.00	\$99.00	\$109.00	\$119.00	\$10.00	\$0.00
<input checked="" type="checkbox"/> DQQ		\$114.00	\$114.00	\$124.00	\$134.00	\$10.00	\$0.00
<input checked="" type="checkbox"/> DK		\$124.00	\$124.00	\$134.00	\$144.00	\$10.00	\$0.00
<input checked="" type="checkbox"/> EKS		\$324.00	\$324.00	\$334.00	\$344.00	\$10.00	\$0.00

Remove Overrides

Reset Grid

Save

Rates Currently Set :


Room Type	Tue Nov 17	Wed Nov 18
> SQQ	\$100.00	\$100.00
SK	\$110.00	\$110.00
DQQ	\$125.00	\$125.00
DK	\$135.00	\$135.00
EKS	\$335.00	\$335.00
PHV	\$900.00	\$900.00
PHS	\$415.00	\$415.00

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

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

Information

×



Rate overrides saved successfully.

OK

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.

Remove Overrides

The "Remove Overrides" box sets rates back to their default value.

NOTE: This will not change the rate on any pre-existing reservations for the group.

Reset Grid

Save

Rates Currently Set :

Room Type	Tue Nov 17	Wed Nov 18
> SQQ	\$89.00	\$89.00
SK	\$99.00	\$99.00
DQQ	\$114.00	\$114.00
DK	\$124.00	\$124.00
EKS	\$324.00	\$324.00
PHV	\$900.00	\$900.00
PHS	\$415.00	\$415.00

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)

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Rate Overrides for Island Ecotours

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Rate Name: Group Rate

Override Rates by Days in Group Block

Override Rates by Date Range

Date From 17-Nov-2020

Date To 18-Nov-2020

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.

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Rate Overrides for Island Ecotours

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Rate Name: Group Rate

Override Rates by Days in Group Block

Override Rates by Date Range

Date From: 17-Nov-2020

Date To: 18-Nov-2020

Room Type	Single:	Double:	Triple:	Quad:	Extra:	Child:
	89	89	89	89	0.00	0.00
<input checked="" type="checkbox"/> SQQ		\$89.00	\$89.00	\$99.00	\$109.00	\$10.00
<input checked="" type="checkbox"/> SK		\$99.00	\$99.00	\$109.00	\$119.00	\$10.00
<input checked="" type="checkbox"/> DQQ		\$114.00	\$114.00	\$124.00	\$134.00	\$10.00
<input checked="" type="checkbox"/> DK		\$124.00	\$124.00	\$134.00	\$144.00	\$10.00
<input checked="" type="checkbox"/> EKS		\$324.00	\$324.00	\$334.00	\$344.00	\$10.00

Remove Overrides

Reset Grid

Save

Rates Currently Set :

Room Type	Tue Nov 17	Wed Nov 18
> SQQ	\$100.00	\$100.00
SK	\$110.00	\$110.00
DQQ	\$125.00	\$125.00
DK	\$135.00	\$135.00
EKS	\$335.00	\$335.00
PHV	\$900.00	\$900.00
PHS	\$415.00	\$415.00

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

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

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

Reset Grid

Save

Rates Currently Set :

Room Type	Tue Nov 17	Wed Nov 18
> SQQ	\$89.00	\$89.00
SK	\$99.00	\$99.00
DQQ	\$114.00	\$114.00
DK	\$124.00	\$124.00
EKS	\$324.00	\$324.00
PHV	\$900.00	\$900.00
PHS	\$415.00	\$415.00

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 shows the 'Group Wizard' interface, specifically the 'Rates' tab. The interface is divided into several sections. At the top, there are tabs for '1. Primary', '2. Rates', '3. Block', '4. Guest Services', '5. Rooming List', '6. Check-In', '7. Check-Out', and '8. Notes'. The 'Rates' tab is active. Below the tabs, there are two main sections: 'Build Attach Rate Plans' and 'Group Default Rate'. The 'Build Attach Rate Plans' section has a 'Rate Wizard' button. The 'Group Default Rate' section has a dropdown menu set to 'Group Rate' and an 'Override Attached Rates' button. Below these, there is a 'Room Type' dropdown menu set to 'DK', which is highlighted with a red box and a circled '1'. Below the 'Room Type' dropdown, there are input fields for 'Manual Rate' and 'Group Rate'. The 'Attached Rates' section on the left lists 'Manual Rate', 'Romantic Rendez-Vous Package', 'Group Rate', and 'Group Rate / Hotel Website'. The 'Available Rates' section on the right lists various rates, including '*Best Available Rate', '*Best Available Rate - Billed Weekly', '*Best Available Rate / GDS', '*Best Available Rate / Hotel Website', 'AAA Rate', 'AAA Rate / GDS', 'AAA Rate / Hotel Website', 'AARP Rates', 'AARP Rates / GDS', 'AARP Rates / Hotel Website', 'ABC Company', and 'ABC Company / Hotel Website'. A 'Post' button is highlighted with a red box and a circled '3'. At the bottom, there is a 'Default Rate' dropdown menu set to 'Romantic Rendez-Vous Packa', which is highlighted with a red box and a circled '2'. The bottom of the screen shows 'Group: Island Ecotours'.

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.

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

Override Attached Rates

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 Rate

Group: Island Ecotours

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.

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 Group Default Rate

Rate Wizard Group Rate Override Attached Rates

1 Room Type DK

2 Manual Rate

	Single	Double	Triple	Quad	Extra	Child
Manual Rate	\$89.00	\$89.00	\$99.00	109.00	\$10.00	\$0.00

Attached Rates

- Manual Rate
- Romantic Rendez-Vous Package
- Group Rate
- Group Rate / Hotel Website

4 Post

3 Default Rate Manual Rate

Available Rates

- Advanced Purchase Weekly Rate / Hotel Web...
- Bed and Breakfast Package
- Booking.com Rate / GDS
- Corporate Preferred Rate
- Corporate Preferred Rate / Hotel Website
- Corporate Standard Rate
- Corporate Standard Rate / Hotel Website
- Expedia Flash Sale Prepaid / GDS
- Expedia Hotel Collect / GDS
- Expedia Prepaid / GDS
- Friends & Family Rate
- JacTravel Rate
- Managers Special Rate

Group: Island Ecotours

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)

R

Group Wizard

×

1. Primary

2. Rates

3. Block

4. Guest Services

5. Rooming List

6. Check-In

7. Check-Out

8. Notes

Display For

17-Nov-2020

◀ Prev

Next ▶

Refresh

November

☒ Include Overbooking Limits

☐ REM

Block Holds

Room Type	TOT	Avg Rate	Tue Nov 17				Wed Nov 18			
			INV	BLK	PUP	RATE	INV	BLK	PUP	RATE
> SQQ	9	\$89.00	9	0	0	\$89.00	9	0	0	\$89.00
SK	9	\$99.00	7	0	0	\$99.00	7	0	0	\$99.00
DQQ	6	\$114.00	6	0	0	\$114.00	6	0	0	\$114.00
DK	6	\$124.00	3	0	0	\$124.00	3	0	0	\$124.00
EKS	6	\$324.00	6	0	0	\$324.00	6	0	0	\$324.00

Total

31

0

0

31

0

0

PROPERTY

31

31

Edit Mode ☐

Enable overbooking ☐

Group: Island Ecotours

Edit Mode

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

R

Group Wizard

×

1. Primary

2. Rates

3. Block

4. Guest Services

5. Rooming List

6. Check-In

7. Check-Out

8. Notes

Display For

17-Nov-2020

◀ Prev

Next ▶

Refresh

November

☒ Include Overbooking Limits

☐ REM

Block Holds

Room Type	TOT	Avg Rate	Tue Nov 17				Wed Nov 18			
			INV	BLK	PUP	RATE	INV	BLK	PUP	RATE
> SQQ	9	\$89.00	9	0	0	\$89.00	9	0	0	\$89.00
SK	9	\$99.00	7	0	0	\$99.00	7	0	0	\$99.00
DQQ	6	\$114.00	6	0	0	\$114.00	6	0	0	\$114.00
DK	6	\$124.00	3	0	0	\$124.00	3	0	0	\$124.00
EKS	6	\$324.00	6	0	0	\$324.00	6	0	0	\$324.00

Total

31

0

0

31

0

0

PROPERTY

31

31

Edit Mode ☐

Enable overbooking ☐

Group: Island Ecotours

Entering the Block

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

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

Group Wizard

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

Display For: 17-Nov-2020 ◀ Prev Next ▶ Refresh November ☒ Include Overbooking Limits ☒ REM Block Holds

Room Type	TOT	Avg Rate	Tue Nov 17					Wed Nov 18				
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE
> SQQ	9	\$89.00	9	5	0	0	\$89.00	9	5	0	0	\$89.00
SK	9	\$99.00	7	5	0	0	\$99.00	7	5	0	0	\$99.00
DQQ	6	\$114.00	6	2	0	0	\$114.00	6	2	0	0	\$114.00
DK	6	\$124.00	3	3	0	0	\$124.00	3	3	0	0	\$124.00
EKS	6	\$324.00	6	0	0	0	\$324.00	6	0	0	0	\$324.00
Total			31	0	0	0		31	0	0	0	
PROPERTY			31					31				

Enable overbooking ☐

Post Cancel

Group: Island Ecotours

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.

R

Group Wizard

×

1. Primary

2. Rates

3. Block

4. Guest Services

5. Rooming List

6. Check-In

7. Check-Out

8. Notes

Display For

17-Nov-2020

◀ Prev

Next ▶

Refresh

November

☒ Include Overbooking Limits

☒ REM

Block Holds

Room Type	TOT	Avg Rate	Tue Nov 17					Wed Nov 18				
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE
> SQQ	9	\$89.00	4	5	0	5	\$89.00	4	5	0	5	\$89.00
SK	9	\$99.00	2	5	0	5	\$99.00	2	5	0	5	\$99.00
DQQ	6	\$114.00	4	2	0	2	\$114.00	4	2	0	2	\$114.00
DK	6	\$124.00	0	3	0	3	\$124.00	0	3	0	3	\$124.00
EKS	6	\$324.00	6	0	0	0	\$324.00	6	0	0	0	\$324.00
Total			16	15	0	15		16	15	0	15	
PROPERTY			16					16				

Edit Mode ☐

Enable overbooking ☐

Group: Island Ecotours

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

Group Wizard

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

Display For: 17-Nov-2020 ◯ ◀ Prev Next ▶ Refresh **November** ☒ Include Overbooking Limits ☒ REM **Block Holds**

Room Type	TOT	Avg Rate	Tue Nov 17					Wed Nov 18				
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE
> SQQ	9	\$89.00	9	0	0	0	\$89.00	9	0	0	0	\$89.00
SK	9	\$99.00	7	0	0	0	\$99.00	7	0	0	0	\$99.00
DQQ	6	\$114.00	6	0	0	0	\$114.00	6	0	0	0	\$114.00
DK	6	\$124.00	3	0	0	0	\$124.00	3	0	0	0	\$124.00
EKS	6	\$324.00	6	0	0	0	\$324.00	6	0	0	0	\$324.00

Total	31	0	0	0		31	0	0	0	
PROPERTY	31					31				

Edit Mode ☐ Enable overbooking ☐

Group: Island Ecotours

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

Block Holds

Room Type	Date From	Date To	Holds
> DK	17-Nov-2020	18-Nov-2020	0
DQQ	17-Nov-2020	18-Nov-2020	0
EKS	17-Nov-2020	18-Nov-2020	0
SK	17-Nov-2020	18-Nov-2020	0
SQQ	17-Nov-2020	18-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 (17-Nov-2020 - 18-Nov-2020)

×

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
> SQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
SK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
DQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
DK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
EKS-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
SQQ-	17-Nov-2020	18-Nov-2020	5	RSI ADMIN	09-Sep-202...	Hold Override
SK-	17-Nov-2020	18-Nov-2020	5	RSI ADMIN	09-Sep-202...	Hold Override
DQQ-	17-Nov-2020	18-Nov-2020	2	RSI ADMIN	09-Sep-202...	Hold Override
DK-	17-Nov-2020	18-Nov-2020	3	RSI ADMIN	09-Sep-202...	Hold Override
SQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	09-Sep-202...	Hold Override
SK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	09-Sep-202...	Hold Override
DQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	09-Sep-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 (17-Nov-2020 - 18-Nov-2020)

×

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
> SQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
SK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
DQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
DK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
EKS-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
SQQ-	17-Nov-2020	18-Nov-2020	5	RSI ADMIN	09-Sep-202...	Hold Override
SK-	17-Nov-2020	18-Nov-2020	5	RSI ADMIN	09-Sep-202...	Hold Override

Room Type

DK

DK
DQQ
EKS
SK
SQQ

Insert

Delete

Insert All

Apply As

Hold Override

▼

Enable overbooking ☐

Post

Cancel

- 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.

R

Block Amendments (17-Nov-2020 - 18-Nov-2020)

×

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
> SQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
SK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
DQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
DK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
EKS-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	03-Sep-202...	Hold Override
SQQ-	17-Nov-2020	18-Nov-2020	5	RSI ADMIN	09-Sep-202...	Hold Override
SK-	17-Nov-2020	18-Nov-2020	5	RSI ADMIN	09-Sep-202...	Hold Override

Room Type	Date From	Date To	Holds	Created By	Created On
EKS	17-Nov-2020	18-Nov-2020	5	ADMIN, RSI	10-Sep-2020

Insert

Delete

Insert All

Apply As

Hold Override

Enable overbooking ☐

Post

Cancel

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

R

Block Amendments (17-Nov-2020 - 18-Nov-2020)

×

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
SK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	09-Sep-202...	Hold Override
DQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	09-Sep-202...	Hold Override
DK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	09-Sep-202...	Hold Override
SQQ-	17-Nov-2020	18-Nov-2020	5	RSI ADMIN	10-Sep-202...	Hold Override
SK-	17-Nov-2020	18-Nov-2020	5	RSI ADMIN	10-Sep-202...	Hold Override
DQQ-	17-Nov-2020	18-Nov-2020	2	RSI ADMIN	10-Sep-202...	Hold Override
DK-	17-Nov-2020	18-Nov-2020	3	RSI ADMIN	10-Sep-202...	Hold Override
SQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	10-Sep-202...	Hold Override
SK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	10-Sep-202...	Hold Override
DQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	10-Sep-202...	Hold Override
DK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	10-Sep-202...	Hold Override
> EKS-	17-Nov-2020	18-Nov-2020	5	RSI ADMIN	10-Sep-202...	Hold Override

Insert

Insert All

Apply As

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*).

The screenshot shows a window titled "Block Amendments (17-Nov-2020 - 18-Nov-2020)". It contains two tables. The first table lists amendments with columns: Room Type, Date From, Date To, Holds, Created By, Created On, and Apply As. The second table shows the current block status with columns: Room Type, Date From, Date To, Holds, Created By, and Created On. A red arrow points from the "Apply As" dropdown menu to the "Hold Override" option in the first table.

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
DQQ-	17-Nov-2020	18-Nov-2020	2	RSI ADMIN	10-Sep-202...	Hold Override
DK-	17-Nov-2020	18-Nov-2020	3	RSI ADMIN	10-Sep-202...	Hold Override
SQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	10-Sep-202...	Hold Override
SK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	10-Sep-202...	Hold Override
DQQ-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	10-Sep-202...	Hold Override
DK-	17-Nov-2020	18-Nov-2020	0	RSI ADMIN	10-Sep-202...	Hold Override
> EKS-	17-Nov-2020	18-Nov-2020	5	RSI ADMIN	10-Sep-202...	Hold Override

Room Type	Date From	Date To	Holds	Created By	Created On
> EKS	17-Nov-2020	18-Nov-2020	0	ADMIN, RSI	10-Sep-2020

At the bottom, there is an "Apply As" dropdown menu with options: Hold Override, Hold Override, and Availability. A red box highlights this menu, and a red arrow points from it to the "Hold Override" option in the first table.

Buttons: Insert, Delete, Insert All, Apply As, Enable overbooking ☐, Post, Cancel

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.

Group Wizard

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

Display For: 17-Nov-2020 ◄ Prev Next ► Refresh **November** ☒ Include Overbooking Limits ☐ REM Block Holds

Room Type	TOT	Avg Rate	Tue Nov 17				Wed Nov 18			
			INV	BLK	PUP	RATE	INV	BLK	PUP	RATE
> SQQ	9	\$89.00	9	0	0	\$89.00	9	0	0	\$89.00
SK	9	\$99.00	7	0	0	\$99.00	7	0	0	\$99.00
DQQ	6	\$114.00	6	0	0	\$114.00	6	0	0	\$114.00
DK	6	\$124.00	3	0	0	\$124.00	3	0	0	\$124.00
EKS	6	\$324.00	1	5	0	\$324.00	1	5	0	\$324.00
Total			26	5	0		26	5	0	
PROPERTY			26				26			

Edit Mode ☐ Enable overbooking ☐

Group: Island Ecotours

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 **Remove** 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

Name	Price
>	

← Add

Remove →

Post

Cancel

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

Group: Island Ecotours

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: Island Ecotours

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	8.00

← Add

Remove →

Post

Cancel

Group: Island Ecotours

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.

Group Wizard

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"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> DK										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> DK										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> DK										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> DQQ										<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/> DQQ										<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"/> 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"/>	

Refresh

Clear

Assign all Rooms

Change Res.

Add Note

Group: Island Ecotours

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

Group Wizard

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"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> DK										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> DK										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> DK										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> DQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> DQQ										<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"/> 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"/>	

Refresh Clear Assign all Rooms Change Res. Add Note

Group: Island Ecotours

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.

Group Wizard

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"/> EKS	New	Margaret	Kennedy	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	

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.

Group Wizard

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"/>	EKS	New	Margaret	Kennedy	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/>	EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	EKS										<input type="checkbox"/>	<input type="checkbox"/>	

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.

Group Wizard

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"/> EKS	1327	Margaret	Kennedy	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> EKS	New	Melissa	Jones	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input checked="" type="checkbox"/> EKS	New	Ian	Walker	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> EKS										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> DK										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> DK										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> DK										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> DQQ										<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> DQQ										<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"/> 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"/>	

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

Group: Island Ecotours

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

Group Wizard

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"/> EKS	1327	Margaret	Kennedy	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> EKS	1343	Melissa	Jones	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> EKS	1342	Ian	Walker	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> EKS	1341	Greg	Mulcair	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> EKS	1340	Sylvie	Ryan	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> DK	1339	Vanessa	Greenberg	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> DK	1338	Julia	Vincent	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> DK	1337	Raymond	Jones	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> DQQ	1336	Tim	Shiner	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> DQQ	1335	Olivia	Markham	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SK	1334	Paula	Pearson	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SK	1333	Francis	Grimes	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SK	1332	Elisa	Newmann	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SK	1331	Ryan	Newport	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SK	1330	David	Smith	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SQQ	1329	Wes	Emery	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
<input type="checkbox"/> SQQ	1328	Amanda	Lewis	17-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: Island Ecotours

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**".

Copy & Past Method

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

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.

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).

Shares

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

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 Profile** - 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.

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.

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.*

R

Group Wizard

×

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"/> EKS	1327	Margaret	Kennedy	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> EKS	1343	Melissa	Jones	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> EKS	1342	Ian	Walker	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> EKS	1341	Greg	Mulcair	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> EKS	1340	Sylvie	Ryan	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> DK	1339	Vanessa	Greenberg	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> DK	1338	Julia	Vincent	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> DK	1337	Raymond	Jones	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> DQQ	1336	Tim	Shiner	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> DQQ	1335	Olivia	Markham	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SK	1334	Paula	Pearson	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SK	1333	Francis	Grimes	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SK	1332	Elisa	Newmann	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SK	1331	Ryan	Newport	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SK	1330	David	Smith	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SQQ	1329	Wes	Emery	17-Nov-2020	2	2	0		Group Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8
	<input type="checkbox"/> SQQ	1328	Amanda	Lewis	17-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: Island Ecotours

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

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.

Wrapping up

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

R

Group Master

×

View Reports

Name	Group ID	City Account	Arrival Date	Departure Date	Block Type	Cut-off Date	Tag N
> Island Ecotours	IE111720		17-Nov-2020	19-Nov-2020	Solid	17-Nov-2020	
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