How to Create a Walk-In Reservation

The following steps review how to create a Walk-In Reservation for an individual Transient Guest.

What is the difference between a Walk-In Reservation and a New Reservation?

- **Walk-In Reservation** - a Walk-In reservation must arrive today and once the reservation process is completed the reservation will appear under the "In House" view screen as it is automatically checked into the PMS.
- **New Reservation** - Any arrival date can be selected for a New Reservation and once the reservation is completed, the reservation will appear under the "Arrivals" view screen (if the arrival day is today) or under the "Reservations" view screen (if the arrival day is sometime in the future).

Please follow these links for more information on creating reservations for Group, Corporate or Wholesaler guests.

Step 1: Select the Walk-In Button

Click the Walk-In button at the top left of the screen.

TIP: The "Walk-in" and "New Res" buttons will be viewable on any screen you are working on in the PMS.
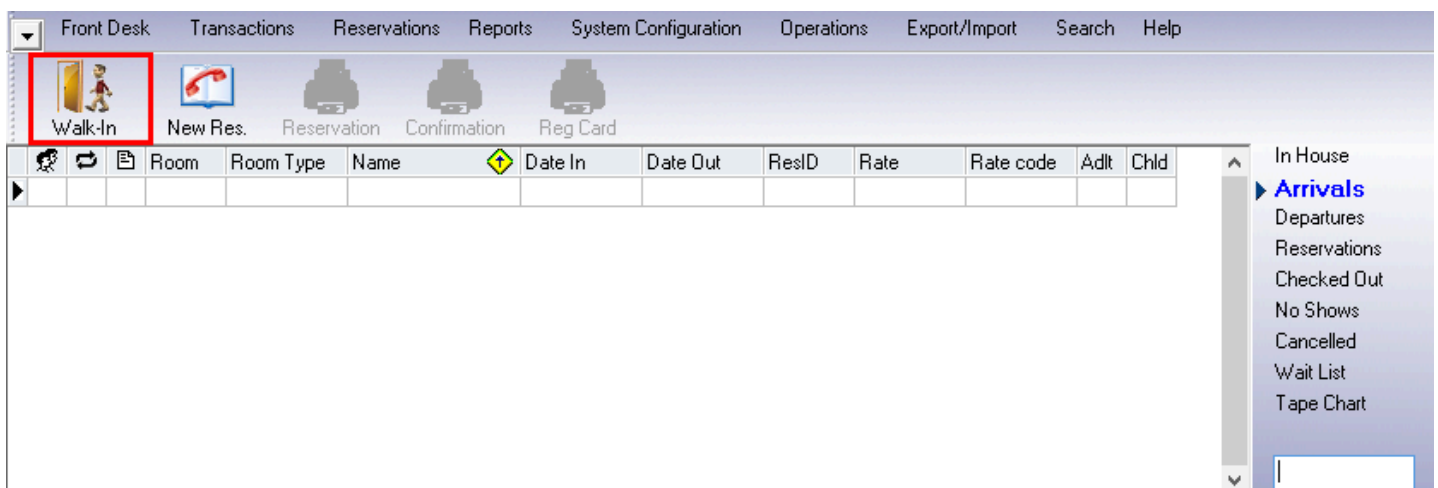
Step 2 - Entering Reservation Details

Start at the top of the screen and work your way down.

- **Client Type –** this field allows you to select which type of client is booking, and acts as a Rate Filter. If you are making a reservation for a Corporate Booking, you may select your Corporate Client Type or for a Group Booking you may select your Group Client Type. In this example, we will use the drop down menu to select our Leisure/Transient Client Type for our Transient Guest *(NOTE: The Client Types in your PMS may vary from this document, depending on your property's configuration. If you are unsure of which Client Type to select for a Leisure/ Transient Booking please confirm with your Manager)*. Selecting the proper Client Type allows the PMS to filter and display the proper rates for the room type and the time period selected.
- **Room Charge –** this drop down menu allows you to select the Room Charge Code that applies to this reservation. The default RCH Room Charge Code will most likely be selected for the majority of reservations created. An example of another Room Charge Transaction Code that may be available is a Room Charge Tax Exempt Code which would allow Room Charges to post without taxes. *(NOTE: These codes may differ in your property depending on your specific PMS configuration, and should be confirmed with your Manager)*.
- **Arrival –** select the arrival date for this reservation
- **Nights –** select the number of nights the guest wishes to stay *(NOTE: If you select a departure date, the number of nights will automatically populate)*
- **Departure –** select the departure date for this reservation *(NOTE: If you select the number of nights the guest wishes to stay, the departure date will automatically populate)*
- **C/O Time –** this is the default check-out time for your property which is setup under System Configuration -> Property -> Contacts & Preference tab. If you wish to extend a late check-out to a guest, you may change the C/O Time here and it will then be reflected on the Housekeeping Reports *(NOTE: As there is no AM/PM designation, it is a Best Practice to use 24 Hour/Military Time in this field)*
- **Adults/Child –** select the number of adults & children that will be staying in the room. The number of people occupying a room can affect your rates, so ensure the correct number of people are input.

Refresh

Now, select the "Refresh" button to the far right hand side of the screen to load the available Rates & Inventory for the Arrival and Departure dates selected. You will notice a green box flashing around it when it needs to be clicked.

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

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

Choosing a Rate

Select the "+" sign under the Rate column to display your Available Rates for a specific Room Type.

The first column after the Rate Name displays the Average Rate for the reservation period. If you scroll to the right, you will see what the rate will be on each night of the guests stay.

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

NOTE: If you do not see the rate that you are looking for it could be because the rate is not available for the dates you have entered. Try changing your dates and selecting the "Refresh" button to see if the desired rates appear.

TIP: If you right click on one of the Rate Plan Names in the list below, a description of the rate you are selling will appear on your screen!

Assigning a Room Number (optional)

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

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

Once this box is checked, you will be able to select a room number from the drop down menu to your right. You must assign the room *before* checking the "**Book**" box.

NOTE: The coloured buttons to the right of the room numbers indicate the Housekeeping Status of each room number at this moment.

- **Green** – room is clean & inspected
- **Yellow** – room is clean but not yet inspected
- **Red** – room is dirty

TIP: Since this room is being directly checked in, you will want to select a room with the green radial dial (ie: clean/inspected).

The Book Box

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

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

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

Step 3 - Entering the Guest Information

Proceed to the "**Guest Info**" tab to enter the guest information.

NOTE: If your property has permission 2090 - Force Search enabled, please proceed to this article: How to use the Search Feature when "Force Search" Permission is on

Search past guest profiles

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

Fill in either:

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

Select the magnifying glass icon to the right of the screen to see if the guest has an existing Guest Profile.

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

Reasons for doing a Guest Search:

- Makes the reservation process move a lot faster
- Ensures cleaner reporting (ie: # of guest stays) and a smaller more accurate database

- Duplicate Guest Profiles can be created if you manually enter the Guest Information for a guest that already has an existing Guest Profile in the PMS

New Guest Profile

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

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

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

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

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

Entering Additional Credit Cards

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

1. After selecting the Extra Cards button the "Additional Cards" box will appear.
2. Select the "New Card" menu at the top of the screen.
3. Enter the additional card information into the box below, and select the "Save" button and the additional card information will be saved.

Step 4: Selecting applicable Guest Services (optional)

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

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

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

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

The highlighted number indicates how many times the Guest Service is being applied to the reservation each day. This is typically based on how the Service is setup, and whether it is based on a "per person", or "per room" pricing model. In this example, the Breakfast service is set to post per person, per day. Because this reservation is for 2 people, it will post twice each day, once for each person in the room. If you wish to change how many times per day this Service posts, you can alter this number up or down as needed. Enter "0" to omit the service for a specific date.

Step 5: Attaching a Travel Agent (if applicable)

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

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

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

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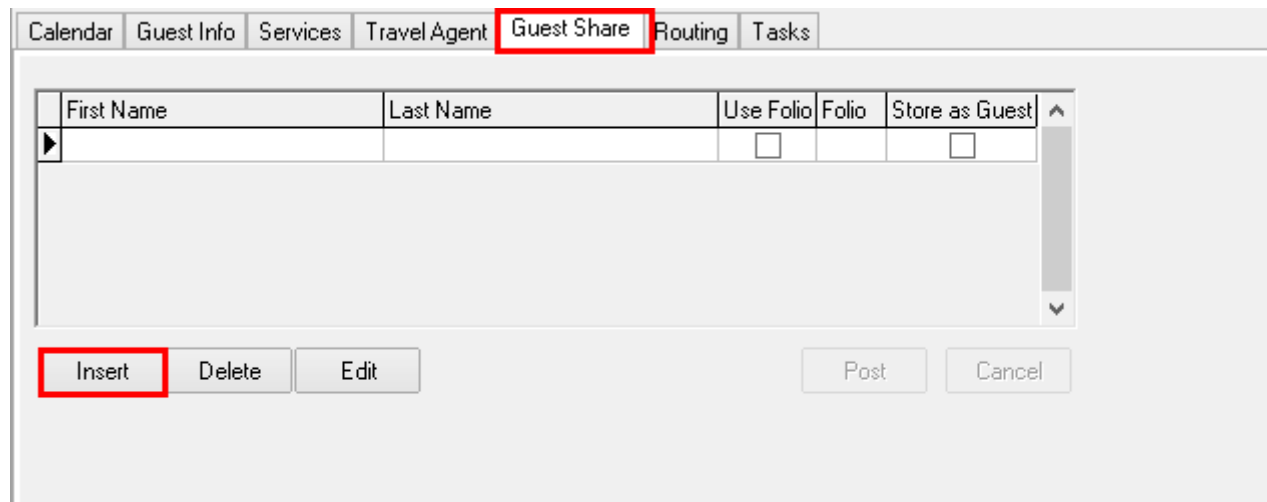

The Additional Travel Agents box will open, and you may attach another agent to this reservation, using the same steps as before. You can change the commission percentage on this reservation only by entering a new amount into the "Override com %" box.

Step 6: Attach Guest Share (if applicable)

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

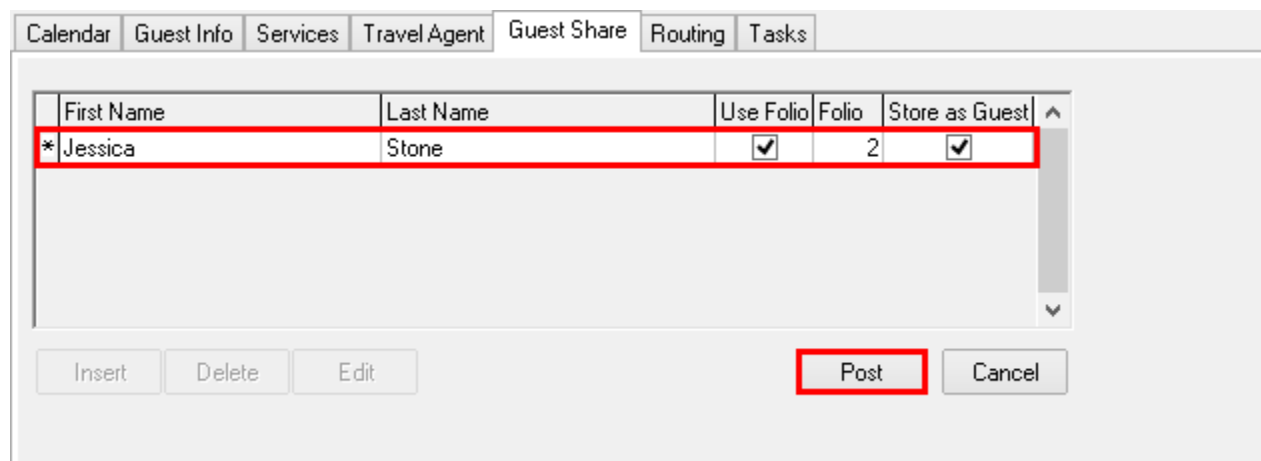Should you need to add a 2nd (or 3rd or 4th, etc…) guest name to a reservation, select the "Insert" button below.

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

- **First/Last Name** – Enter the first & last name of the sharing guest
- **Use Folio** – Check this box if you wish for this guest to have their own specific Folio where charges can be posted
- **Folio** – Once the Use Folio box is checked, a folio number will automatically be assigned to this guest. Any charges this guest wishes to pay for can be posted to this folio
- **Store as Guest** – If you wish to create a separate Guest Profile for this guest, check this box and then enter the Guest Information into the box that appears.

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

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

Step 7: Setup Routing (if applicable)

The Routing tab allows you to:

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

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

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

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

treated as a percentage. For example, if I enter "75" into the Amount field, and check the percentage box, the PMS will route 75% of the daily Room Charge, instead of $75.

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

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

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

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

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

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

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

Step 8: Complete the Reservation

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

"Reservation is Expired" message

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

Refreshing reservation

To refresh and complete your reservation:

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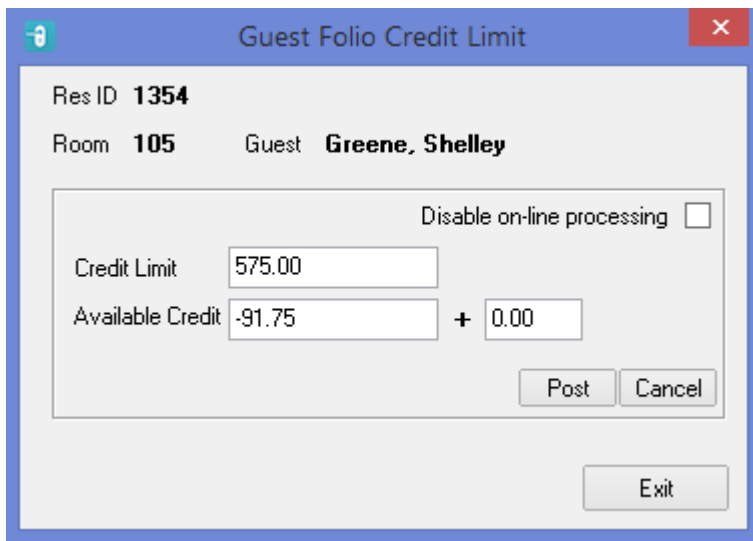
Guest Folio Credit Limit

Once you have clicked "**OK**" on the reservation, the **Guest Folio Credit Limit** box will then appear. The "**Credit Limit**" assigned to the reservation will automatically cover the room & tax for the guest's entire stay (ie: $575.00). If you were to select "**Post**" at this time, the guest's credit limit would reflect $575.00; however, because this guest has $91.75 of Guest Services on their account, you need to increase the credit limit to cover the additional $91.75.

NOTE: If you wish to take additional credit to cover other incidentals, you can increase the $91.75 to a higher amount.

Increasing the Credit Limit

To ensure the Guest Folio has enough Credit Limit to cover all charges, you will add an additional $91.75 into the box located to the right of the plus (+) sign.

NOTE: If you have a PMS Credit Card Interface, it will automatically get an approval for this authorization once you select the "Post" button. If you do NOT have a PMS Credit Card Interface, you will need to manually process the approval on your CC Terminal *PRIOR* to selecting the "Post" button.

Post

Select "**Post**" to apply the appropriate credit amount. Note that the **Credit Limit** has been increased to include the original $575.00 for Room & Tax, plus the $91.75 for the Guest Services. The new total **Credit Limit** is $666.75.

Complete Check-In

The reservation is now complete and the guest appears under the "In House" view screen.

Reg Card

If your system is not set to auto print or pre-print Reg Cards, you may need to manually print the Reg Card by clicking the Reg Card button at the top of the screen.

First Night's Charges

1. Once the guest is checked-in, the 1st night's Room & Tax will automatically post to the Guest Folio, along with any Guest Services that were also scheduled to post on Day 1.
2. In the bottom right hand corner, we can see a Summary of the Guest Folio. The last two lines reflect the current "Credit Limit" on the Guest Folio. Here we see the guest has enough credit to cover all their charges, but no "Available Credit" for additional incidental charges.

Increase an In House Guest's Credit Limit

To increase a guest's Credit Limit, go to Transactions -> Guest Folio Credit Limit.

Enter Additional Credit

Enter the additional amount of credit that you would like to place on the Guest Folio into the box located to the right hand side of the "+" sign.

Post

Select "**Post**" to apply the additional credit.

Review New Credit Limit

The Guest Folio will now reflect the total credit (**Credit Limit**), as well as any additional credit (**Available Credit**) they may have to cover other incidental charges.

In this example, the guest has a Credit Limit of $666.75 for the projected charges on their folio (Room & Tax + scheduled Guest Services), plus an additional $100 for any other incidentals they may incur. The **Credit Limit** reflects the sum of these as $766.75.

The Folio "Summary" View

- **Balance -** Reflects the sum of current charges on the Guest's Folio
- **Credit Limit** - Reflects the total Credit Limit (including additional credit obtained)
- **Available Credit** - Reflects additional Credit over and above the sum of any current and scheduled charges on a Guest's Folio. *NOTE: If you are using a Credit Card Interface with the PMS, this is additional money held as an Authorization on the Guest's Credit card, and unless used during their stay, will be released upon check-out.*