

How to Move a Posting to Another Reservation while In House

The following article explains the steps required to move a posting from one folio to another on the same reservation, as well as from one reservation to another.

Note: This feature can only be used between In House Guests. Please see [How to Reverse/Adjust/Transfer a Posting](#) for options with other reservation statuses.

Moving a single Transaction

To transfer a single posting (ie: charge or payment) to another guest reservation you can:

1. Right click on the transaction and select "Move"

OR

2. click on the transaction line so that the black arrow is pointing towards the transactions and then select the "Move" button at the top of the folio screen.

The screenshot displays a software interface for managing hotel folios. At the top, there are buttons for 'Refresh', 'Select', and 'Move'. The 'Move' button is highlighted with a red box and a circled '2'. Below this is a table of transactions:

#	Date	TCode	Description	Amount	Tax	Total	Voucher
1	31-Jul-2015	RCH	Room Charge	\$700.00	\$105.00	\$805.00	
1	31-Jul-2015 10:...	CHAMP	Champagne			01.70	

The 'Champagne' transaction line is highlighted in blue. A context menu is open over this line, with 'Move' selected and highlighted in blue. A circled '1' points to the 'Move' option in the menu. To the right of the table is a 'Summary' panel with the following data:

Summary	
Room Charge:	\$700.00
Other Charge:	\$90.00
Tax:	\$116.70
Total:	\$906.70
Credits:	\$0.00
Balance:	\$906.70
Credit Limit:	\$3,105.00
Available Credit:	-\$101.70

At the bottom of the interface, there are tabs for 'Guest Info' and 'Folio', and radio buttons for 'Now' and 'Stay'.

Moving multiple Transactions

To move more than one transaction at a time, the "Select" button located at the top of the folio screen can be used. Simply click on the transaction line below and then click the "Select" button to highlight the line in blue. Continue these steps until all desired transactions have been highlighted. You may now use the "Move" button to move all the transactions at once.

0 - All Folios Refresh **Select** Move

#	Date	TCode	Description	Amount	Tax	Total	Voucher
1	15-Jul-2015	RCH	Room Charge	\$300.00	\$45.00	\$345.00	
2	15-Jul-2015	RAB	RAB	\$30.00	\$0.00	\$30.00	
1	16-Jul-2015	RCH	Room Charge	\$300.00	\$45.00	\$345.00	
2	16-Jul-2015	RAB	RAB	\$30.00	\$0.00	\$30.00	
1	17-Jul-2015	RCH	Room Charge	\$350.00	\$52.50	\$402.50	
1	18-Jul-2015	RCH	Room Charge	\$350.00	\$52.50	\$402.50	
1	19-Jul-2015	RCH	Room Charge	\$400.00	\$60.00	\$460.00	
1	20-Jul-2015	RCH	Room Charge	\$400.00	\$60.00	\$460.00	
1	24-Jul-2015	RCH	Room Charge	\$400.00	\$60.00	\$460.00	
				\$4,610.00	\$682.50	\$5,292.50	

Summary

Room Charge: **\$4,550.00**

Other Charge: **\$60.00**

Tax: **\$682.50**

Total: **\$5,292.50**

Credits: **\$0.00**

Balance: **\$5,292.50**

Credit Limit: **\$6,776.00**

Available Credit: **\$1,483.50**

Now Stay

Guest Info Folio

After the "Move" button is selected, a box will appear allowing you to select where you would like to transfer the transaction.

Select the following fields to transfer the charge to another Guest Reservation:

- **Destination Room** – use the drop down menu to select the Room Number of the Guest Reservation where you would like to transfer the charge. **NOTE:** This list will only contain IN HOUSE guestrooms.
- **Destination Folio** – use the drop down menu to select which Folio would like the charge to transfer onto
- **Note** – this area allows you to add any additional notes regarding the transfer.

Move Selected Transactions ✕

Current Room **502** **Greene, Shelley**

Destination Room **Greene, Shelley**

Destination Folio

Note

Select "**Post**" to transfer the transaction.

Move Selected Transactions X

Current Room **502** **Greene, Shelley**

Destination Room **101** **Rhodes, Matthew**

Destination Folio **2 - New Folio**

Note

On the original guest reservation, you see the original posting and then the corresponding transfer. Notice how both have a red arrow next to them to signify that the transaction was moved off of the guest folio.

0 - All Folios Refresh Select **Move**

	#	Date	TCode	Description	Amount	Tax	Total	Voucher
	1	31-Jul-2015	RCH	Room Charge	\$700.00	\$105.00	\$805.00	
	1	31-Jul-2015 10:...	CHAMP	Champagne	\$90.00	\$11.70	\$101.70	
	1	31-Jul-2015 11:...	CHAMP	Trnsf. to 1366/2 Champa...	-\$90.00	-\$11.70	-\$101.70	
					\$790.00	\$116.70	\$906.70	

On the reservation where the transaction was transferred to, you will now see the transaction appear with a blue arrow pointing towards it to show that it was transferred onto the guest folio.

#	Date	TCode	Description	Amount	Tax	Total
8	27-Jul-2015	RCH	Room Charge	\$360.00	\$54.00	\$
8	28-Jul-2015	RCH	Room Charge	\$360.00	\$54.00	\$
1	29-Jul-2015 12:...	CHAMP	Trnsf. from 1324/1 Trnsf. from 1364/2 Trnsf. fr...	\$90.00	\$11.70	\$
				\$810.00	\$119.70	\$

Folio Appearance

When printing the Guest Folio for the guest, if you do not want the transfer to display on the Guest Folio go to Transactions Menu -> Folio Appearance.

The screenshot shows the 'Transactions' menu with 'Folio Appearance' selected. The background displays a table of transactions with columns: Date Out, Stay, ResID, Rate, Rate code, Adlt, and Chld. The table contains several rows of data, with one row highlighted in green.

Date Out	Stay	ResID	Rate	Rate code	Adlt	Chld
02-Aug-2015	0	1366	\$550.00	*Best Avail...	2	0
31-Jul-2015	2	1324		Jonview	2	0
04-Aug-2015	2	1363	\$666.67	3FOR2	2	0
04-Aug-2015	0	1367	\$675.00	*Best Avail...	2	0
05-Aug-2015	2	1364	\$642.86	*Best Avail...	2	0

Check the box next to **“Do Not Show Transferred Transactions”** and then select **“OK”**

Folio Appearance Settings ✕

Do Not Show Transferred Transactions

Do Not Show Reversed Transactions

Do Not Show Adjustments

Select the **“Refresh”** button at the top of your Guest Folio screen.

0 - All Folios Refresh Select Move

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1	31-Jul-2015 11:...	CHAMP	Tnsf. to 1366/2 Champa...	-\$90.00	-\$11.70	-\$101.70	
				\$790.00	\$116.70	\$906.70	

Summary

Room Charge: **\$700.00**

Other Charge: **\$90.00**

Tax: **\$116.70**

Total: **\$906.70**

Credits: **\$0.00**

Balance: **\$906.70**

Credit Limit: **\$3,105.00**

Available Credit: **-\$101.70**

Now Stay

Guest Info Folio

The Transferred transactions will no longer appear on the Guest Folio. This method can be used to create a cleaner looking bill for the guest.

Follow the link to read more about [Folio Appearance Settings](#)

0 - All Folios Refresh Select Move

#	Date	TCode	Description	Amount	Tax	Total	Voucher
1	31-Jul-2015	RCH	Room Charge	\$700.00	\$105.00	\$805.00	
				\$700.00	\$105.00	\$805.00	

Summary

Room Charge: **\$700.00**

Other Charge: **\$0.00**

Tax: **\$105.00**

Total: **\$805.00**

Credits: **\$0.00**

Balance: **\$805.00**

Credit Limit: **\$3,105.00**

Available Credit: **\$0.00**

Now Stay

Guest Info Folio