

Introduction to the Groups Module

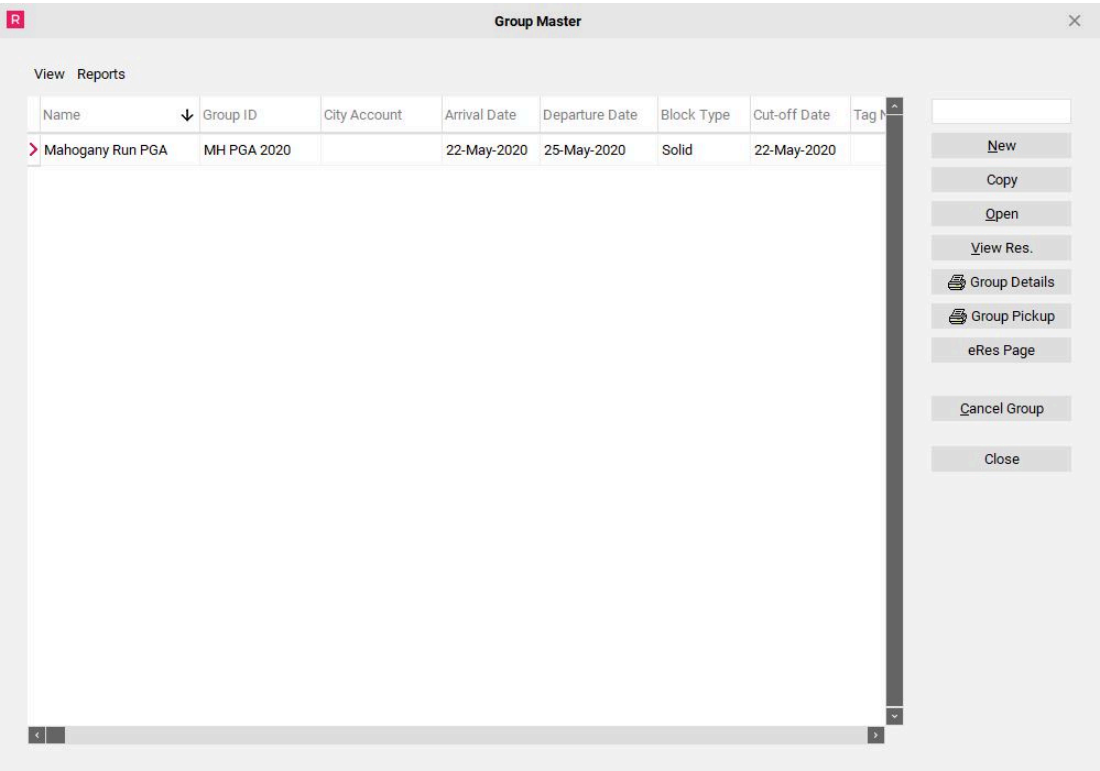
The Group Module in RoomkeyPMS provides a wide array of group functionality, from setting up a block, to attaching rates, routing charges, and entering rooming list reservations. Additionally, it provides some helpful reports for tracking a number of Group related tasks and business.

The following article will provide an overview of navigation through the Group Master.

The Group Master

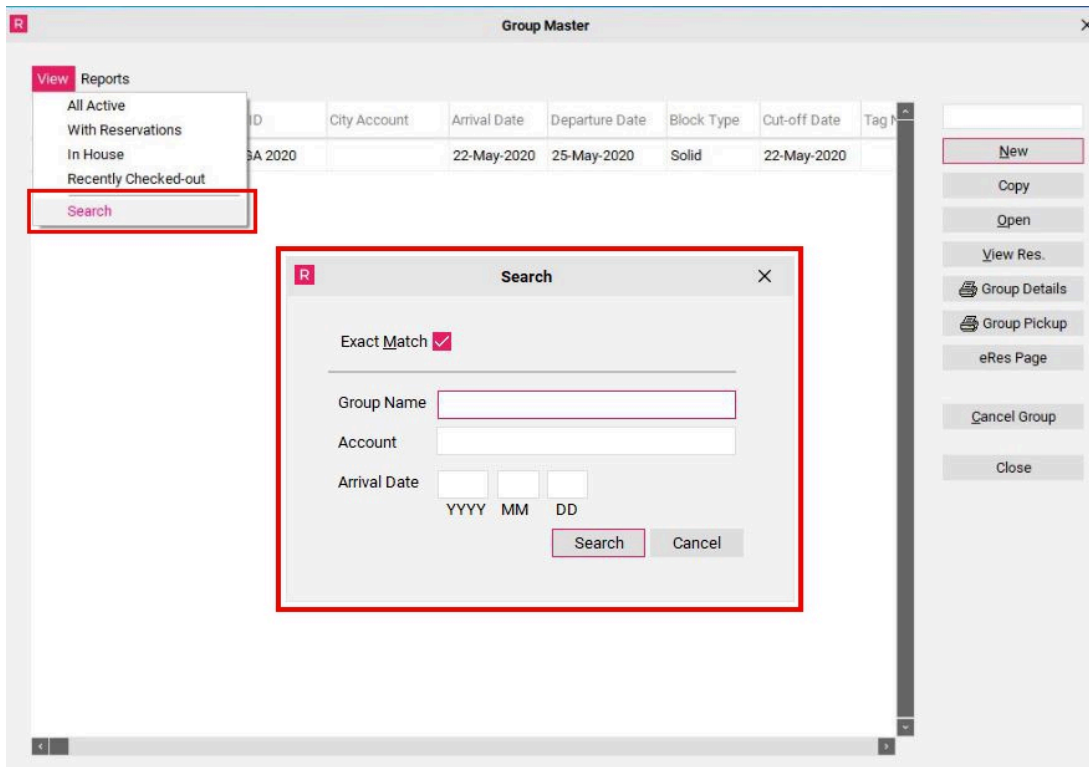
To access the Group Module, go to **Operations > Groups**.

This opens the **Group Master**, which contains a list of all of your currently active Groups.



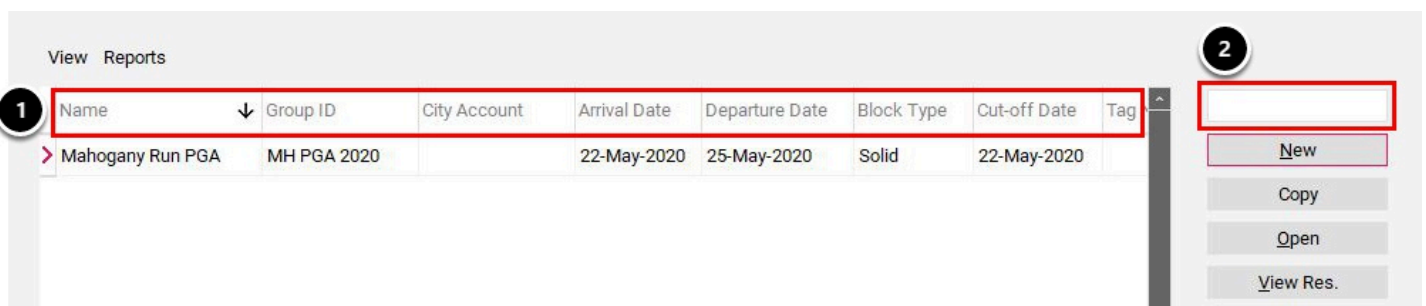
Using Search

A group is considered Active up until 30 days after the group's departure date. Any Canceled or Inactive groups may be viewed by going to the **View** menu and selecting **Search**. To widen your search results, uncheck **Exact Match**.



The Header

1. The headers along the top of the Group List (ie: Name, Group ID, City Account, Arrival Date, Departure Date, Block Type, Cut-off Date, Tag Name) may be selected to sort the Group List accordingly. For example, if you click on the "Name" column, it will sort your Group List alphabetically by Name.
2. Selecting a header also activates the **search box to the right of the screen**. If the "Name" header is active, for example, you may begin to type in the name of the group you are searching for, and the PMS will locate that group in the list (indicated by the black arrow pointing towards the group name).



Menu Options

Along the top of the Group Master List are two Menu Options:

- **View** - this menu allows you to select what groups you would like to view in the Group Master List (ie: All Active, With Reservations, In House, Recently Checked-Out) and it also allows you to search for a specific group by name, account name or by arrival date. Better results can be yielded if the “exact match” box is unchecked.
- **Reports** - this menu produces a list of all the reports available through the Group Module

NOTE: Both the **Search** function and the **Reports** are discussed in more detail in the articles titled [How to Search for a Cancelled Group](#) and [Group Reports](#), in the Groups manual.

View Reports									
Name	Group ID	City Account	Arrival Date	Departure Date	Block Type	Cut-off Date	Tag		
> Mahogany Run PGA	MH PGA 2020		22-May-2020	25-May-2020	Solid	22-May-2020			

Functions

To the right of the Group Master List are various functions and reports for the Group Module.

- **New** – used to create a new group
- **Copy** – used to copy the information found in a current or past group, in order to create a new group
- **Open** – used to open the Group Wizard for an existing group
- **View Res.** – produces a list of reservations currently made for a selected group.
- **Group Details** – produces Group Detail Report (reviewed in the [Group Reports](#) article)
- **Group Pickup** – produces Group Pickup Report (reviewed in the [Group Reports](#) article)
- **eRes Page** – select to setup a Group so they are able to book using the eRes Booking Engine (reviewed in the [Groups and eRes Booking Engine](#) article)
- **Cancel Group** – use this button to cancel a Group as well as all associated reservations
- **Close** – to close out of the Group Master

View Reports

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> Mahogany Run PGA	MH PGA 2020		22-May-2020	25-May-2020	Solid	22-May-2020	

New

Copy

Open

View Res.

Group Details

Group Pickup

eRes Page

Cancel Group

Close