

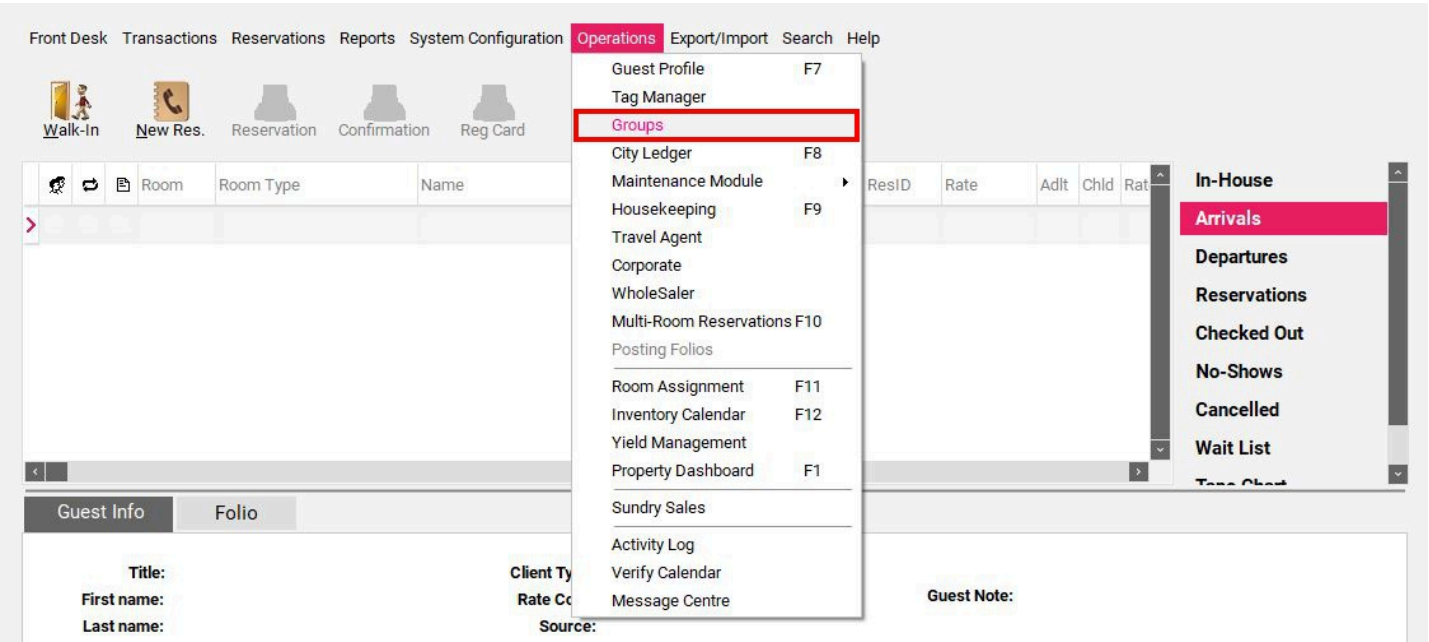
# How to Create an Individual Pay Group

This article reviews how to create a group where each guest will be responsible for paying their own charges, and making their own reservations (as opposed to a Rooming List group).

Click below to view step-by-step instructions:

## Access the Groups Module

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



The Group Master contains a list of all active Groups currently found in the PMS. To create a group click on the **New** button in the Group Master to open the Group Wizard.

View Reports

Name	Group ID	City Account	Arrival Date	Departure Date	Block Type	Cut-off Date	Tag
> 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

## 1. Primary

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

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

**General** Contact & Billing Info Travel Agent

Name

Group ID  (A unique ID for your group)

Client type

Room Charge Code

Arrival Date  Nights

Departure Date  C/O Time

☐ Guests can arrive and depart outside of the block

Days Before  Days After

Active ☐

Cut-off Days

Cut-off Type

Block Type

Source of Business

Attach Note

Enable overbooking ☐ Post Cancel

Group: .....

- **Name** – the name of the Group
- **Group ID** – this is a code that specific to this group. A group code can only be used once so it is important to make it unique to avoid errors when creating future groups for the same

company. The suggested format is the initials of the group, followed by the arrival date. This code is mandatory should you wish for the group to be able to book reservations using the eRes Online Booking Engine.

- **Client Type** – select Client Type for this group.
- **Room Charge Code** – select Room Charge Transaction Code
- **Arrival Date** – select the group arrival date
- **Nights** – input the number of nights the group will be staying
- **Departure Date** - will auto populate after the Nights are selected
- **Guests can arrive and depart outside the block** – this section allows you to setup pre & post nights for the group. If you wish to enter pre or post nights, check this box and then enter the number of pre nights next to “Days Before” and the number of post nights next to “Days After”
- **Active** – check this box to make this Group active
- **Cut-off Days** – the number of days before the Arrival Date that you would like for the block to release
- **Cut-off Type** – select if the Group Block is to be released by Whole Block (the entire block will be released on the Cut off Date) or by One Day (the block will release one day at a time beginning with the first date set in the Cut off Date)
- **Block Type** – select if the Group Block will be either of the following:
  - Solid Block Type: the rooms are taken out of general inventory
  - Transparent Block Type: the rooms are not taken out of general inventory, so the group guests may be in competition with the general public for the guestroom inventory
- **Source of Business** – select the source of business from the pull down menu
- **Attach note** - this note will be placed on all picked up reservations under “Reservation Notes”. Typically this note is regarding billing instructions for the group (ie: "All charges to be paid by the individual guests" or "Room & Tax to be covered by the group Master Account")

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

General
Contact & Billing Info
Travel Agent

Name
Jones Family Reunion

Group ID
JFR102320
(A unique ID for your group)

Client type
GROUP

Room Charge Code
RCH

Arrival Date
23-Oct-2020
Nights
2

Departure Date
25-Oct-2020
C/OTime
11:00

☒ Guests can arrive and depart outside of the block

1
Days Before
1
Days After

Active
☒

Cut-off Days
0

Cut-off Type
Whole Block

Block Type
Solid

Source of Business
Group Block

Attach Note
All charges to the individual.

Post
Cancel

Group: Jones Family Reunion

## Contact & Billing Info

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

- **Folio Number** - Use the drop down menu next to "Folio number" to select folio number 1. When all charges are to the individual guest folio number MUST be set to 1.
- **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.

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

General **Contact & Billing Info** Travel Agent

Folio number 1 (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 716 Duncan Avenue

Zip 10011

City New York

Country United States

State New York

Contact Jason Jones

Phone 555-555-5555

Email jason@thefamilyjones.com

Fax

Tag

Sales Manager

Group: Jones Family Reunion

**Post** Cancel

## Travel Agent

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

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

- Use the drop down menu to select a Travel Agent from the list of Travel Agents that are currently set up in the Travel Agent Module. Once a Travel Agent is selected the IATA number and Default Commission Rate will populate to the right of the Travel Agent Name.

- If the Travel Agent has a different commission than the one indicated, enter the name of the Travel Agent in the **Contact** box, then enter the new commission rate in the **Override Commission %** box
- If the Travel Agent does not yet have a profile, click the **Binoculars** button (next to the drop-down menu) to open up the Travel Agent Module so that a new Travel Agent may be created.
- Once a Travel Agent has been selected, click **Post**.

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

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

Travel Agent ABC Travel Agency IATA 010123

Contact

Override commission %  Default commission: 10 %

Group: Jones Family Reunion

Post Cancel

## Routing/Deposit

This tab is used for routing charges to either a House Account or a City Ledger Account, when all or portions of the bill are being picked up by a person or company. It will be reviewed in the articles [Creating a Group with Billing to a City Ledger Account](#), and [Creating a Group with Billing to a House Account](#).

**Since the group in this example is for guests that will be paying all of their own charges, we will skip this tab for this type of group.**

## 2. Rates

Attach rates via the Rates Section.

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

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

Build Attach Rate Plans Rate Wizard Group Default Rate

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

Room Type DK

Manual Rate Single Double Triple Quad Extra Child

Attached Rates

> Manual Rate

Available Rates

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

Default Rate

Group: Jones Family Reunion

## Attaching Rates to the Group

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

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

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

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

Build Attach Rate Plans

Rate Wizard

Group Default Rate

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

Room Type

Manual Rate    Single    Double    Triple    Quad    Extra    Child

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

If using an existing rate for this group:

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

Rate Wizard

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

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

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

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

General Client Types Corporates **Groups**

☒ Hotel Direct

☒ Jones Family Reunion

☒ Mahogany Run PGA

☐ Hotel Website

☐ Jones Family Reunion

☐ Mahogany Run PGA

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

Update

## Setting the Default Rate

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

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



Group Wizard

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

Build Attach Rate Plans

Rate Wizard

Group Default Rate

Group Rate

Post Cancel

Room Type DK

Manual Rate

Single	Double	Triple	Quad	Extra	Child
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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: Jones Family Reunion

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

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

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

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	Available Rates
Manual Rate	*Best Available Rate
Group Rate	*Best Available Rate / GDS
	*Best Available Rate / Hotel Website
	4th Night Free!
	AAA/CAA Rate
	AAA/CAA Rate / GDS
	AAA/CAA Rate / Hotel Website

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

- By Days in Group Block
- By Date Range

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

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

**Rate Overrides for Jones Family Reunion**

Rate Name:  Use the drop down menu to select the rate you want to override

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

1 Day Pre Arrival  
☒ Thu Oct 22 ☒

**2 Day Main Group Block** Uncheck day by day OR Uncheck a group of days

☒ Fri Oct 23 ☒ Sat Oct 24 ☒

1 Day Post Departure  
☒ Sun Oct 25 ☒

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	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> SK		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> DQQ		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> DK		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> EKS		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Remove Overrides Reset Grid Save

**Rates Currently Set :**

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

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

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

**Rate Overrides for Jones Family Reunion**

Rate Name:

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

1 Day Pre Arrival  
☒ Thu Oct 22

2 Day Main Group Block  
☒ Fri Oct 23 ☒ Sat Oct 24

1 Day Post Departure  
☒ Sun Oct 25

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

Remove Overrides |

**Rates Currently Set :**

Room Type	Thu Oct 22	Fri Oct 23	Sat Oct 24	Sun Oct 25
SQQ	\$150.00	\$175.00	\$175.00	\$150.00
SK	\$160.00	\$185.00	\$185.00	\$160.00
DQQ	\$175.00	\$200.00	\$200.00	\$175.00
DK	\$185.00	\$210.00	\$210.00	\$185.00
EKS	\$385.00	\$410.00	\$410.00	\$385.00

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.

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

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

Remove Overrides

Reset Grid

Save

**Rates Currently Set :**

Room Type	Thu Oct 22	Fri Oct 23	Sat Oct 24	Sun Oct 25
> SQQ	\$100.00	\$100.00	\$100.00	\$100.00
SK	\$100.00	\$100.00	\$100.00	\$100.00
DQQ	\$100.00	\$100.00	\$100.00	\$100.00
DK	\$100.00	\$100.00	\$100.00	\$100.00
EKS	\$100.00	\$100.00	\$100.00	\$100.00

**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)

R

Rate Overrides for Jones Family Reunion

X

Rate Name:
Group Rate

Override Rates by Days in Group Block

Override Rates by Date Range

Date From
2020-10-22
Date To
2020-10-25

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

**Rate Overrides for Jones Family Reunion**

Rate Name:

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

Date From:  Date To:

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

Remove Overrides

**Rates Currently Set :**

Room Type	Thu Oct 22	Fri Oct 23	Sat Oct 24	Sun Oct 25
<input checked="" type="checkbox"/> SQQ	\$100.00	\$100.00	\$100.00	\$100.00
SK	\$100.00	\$100.00	\$100.00	\$100.00
DQQ	\$100.00	\$100.00	\$100.00	\$100.00
DK	\$100.00	\$100.00	\$100.00	\$100.00
EKS	\$100.00	\$100.00	\$100.00	\$100.00

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

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

Remove Overrides

**Rates Currently Set :**

Room Type	Thu Oct 22	Fri Oct 23	Sat Oct 24	Sun Oct 25
<input checked="" type="checkbox"/> SQQ	\$100.00	\$90.00	\$90.00	\$100.00
SK	\$100.00	\$90.00	\$90.00	\$100.00
DQQ	\$100.00	\$90.00	\$90.00	\$100.00
DK	\$100.00	\$90.00	\$90.00	\$100.00
EKS	\$100.00	\$90.00	\$90.00	\$100.00

## Setting a new Default Rate for an individual Room Type

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

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

The screenshot displays a hotel management system interface. At the top, a 'Room Type' dropdown menu is set to 'DK' and is highlighted with a red box and a circled '1'. Below it, there are input fields for 'Manual Rate' and 'Default Rate'. The 'Default Rate' dropdown is set to 'Group Rate' and is also highlighted with a red box and a circled '2'. To the right, a list of 'Available Rates' is shown, including options like '\*Best Available Rate', '\*Best Available Rate / GDS', and '\*Best Available Rate / Hotel Website'. A 'Post' button is highlighted with a red box and a circled '3'. The interface also includes sections for 'Attached Rates' and 'Manual Rate' with various sub-options. At the bottom, it shows 'Group: Jones Family Reunion'.

## 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.



The screenshot shows a hotel management system interface. At the top, the 'Room Type' dropdown is set to 'DK' (highlighted with a red box and callout 1). Below it, the 'Manual Rate' section has input fields for Single, Double, Triple, Quad, Extra, and Child. The 'Attached Rates' section on the left shows 'Manual Rate' and 'Group Rate' (highlighted with a red box and callout 3). The 'Available Rates' section on the right lists various rates, with 'ABC Company' highlighted (callout 2). Navigation buttons like 'Post' and 'Cancel' are visible. The bottom of the interface shows the 'Default Rate' set to 'Group Rate' and the group name 'Jones Family Reunion'.

## Creating a Manual Rate for a Group (not recommended)

If you wish to setup a Manual Rate:

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

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

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

- Room Type:** A dropdown menu set to "DK" (highlighted with a red box and labeled 1).
- Manual Rate Table:** A table with columns for room types and their corresponding rates (highlighted with a red box and labeled 2).
 

Manual Rate	Single	Double	Triple	Quad	Extra	Child
	100.00	100.00	100.00	100.00	\$30.00	
- Attached Rates:** A section on the left with a link to "> Manual Rate".
- Available Rates:** A list of various rate types on the right, including "Booking.com Rate / Hotel Website", "Corporate Preferred Rate", "Expedia Flash Sale Prepaid", etc.
- Post/Cancel Buttons:** A "Post" button (highlighted with a red box and labeled 4) and a "Cancel" button.
- Default Rate:** A dropdown menu set to "Manual Rate" (highlighted with a red box and labeled 3).
- Group Name:** "Group: Jones Family Reunion" at the bottom.

### 3. Block

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

In this view, the following fields are viewable:

- **Room Type** - a list of your active Room Types
- **TOT** - total inventory for each Room Type
- **Avg Rate** - the Average Rate (based on the Group Rate attached to the group in the Rates tab)

Then, broken down by Group Dates (this includes pre/post nights)

- **INV** - Available Inventory for each Room Type on each date
- **BLK** - Group Block (this number will decrease as reservations are created)
- **PUP** - Rooms Picked Up (this number will increase as reservations are created)
- **REM** - Remaining Rooms in Block (BLK - PUP)

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

Display For  
2020-10-22
Prev
Next
Refresh
October
☒ Include Overbooking Limits
☐ REM
Block Holds

Room Type	TOT	Avg Rate	Thu Oct 22				Fri Oct 23				Sat Oct 24				Sun Oct 25			
			INV	BLK	PUP	RATE	INV	BLK	PUP	RATE	INV	BLK	PUP	RATE	INV	BLK	PUP	RATE
> SQQ	9	\$95.00	9	0	0	\$100.00	9	0	0	\$90.00	9	0	0	\$90.00	9	0	0	\$100.00
SK	9	\$95.00	9	0	0	\$100.00	9	0	0	\$90.00	9	0	0	\$90.00	9	0	0	\$100.00
DQQ	6	\$95.00	6	0	0	\$100.00	6	0	0	\$90.00	6	0	0	\$90.00	6	0	0	\$100.00
DK	6	\$95.00	6	0	0	\$100.00	6	0	0	\$90.00	6	0	0	\$90.00	6	0	0	\$100.00
EKS	6	\$95.00	6	0	0	\$100.00	6	0	0	\$90.00	6	0	0	\$90.00	6	0	0	\$100.00
Total			36	0	0		36	0	0		36	0	0		36	0	0	
PROPERTY			34				34				34				34			

Edit Mode ☐
Enable overbooking ☐

Group: Jones Family Reunion

## Edit Mode

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

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

Display For  
2020-10-22
Prev
Next
Refresh
October
☒ Include Overbooking Limits
☐ REM
Block Holds

Room Type	TOT	Avg Rate	Thu Oct 22				Fri Oct 23				Sat Oct 24				Sun Oct 25			
			INV	BLK	PUP	RATE	INV	BLK	PUP	RATE	INV	BLK	PUP	RATE	INV	BLK	PUP	RATE
> SQQ	9	\$95.00	9	0	0	\$100.00	9	0	0	\$90.00	9	0	0	\$90.00	9	0	0	\$100.00
SK	9	\$95.00	9	0	0	\$100.00	9	0	0	\$90.00	9	0	0	\$90.00	9	0	0	\$100.00
DQQ	6	\$95.00	6	0	0	\$100.00	6	0	0	\$90.00	6	0	0	\$90.00	6	0	0	\$100.00
DK	6	\$95.00	6	0	0	\$100.00	6	0	0	\$90.00	6	0	0	\$90.00	6	0	0	\$100.00
EKS	6	\$95.00	6	0	0	\$100.00	6	0	0	\$90.00	6	0	0	\$90.00	6	0	0	\$100.00
Total			36	0	0		36	0	0		36	0	0		36	0	0	
PROPERTY			34				34				34				34			

Edit Mode ☐
Enable overbooking ☐

Group: Jones Family Reunion

## 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, Thu Oct 22 and Sun Oct 25 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 (Fri Oct 23 and Sat Oct 24).

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

Display For  
2020-10-22 ◯ ◀ Prev Next ▶ Refresh **October** ☒ Include Overbooking Limits ☒ REM Block Holds

Room Type	TOT	Avg Rate	Thu Oct 22					Fri Oct 23					Sat Oct 24					Sun Oct 25				
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE
SQQ	9	\$95.00	9	0	0	0	\$100.00	9	5	0	0	\$90.00	9	5	0	0	\$90.00	9	0	0	0	
SK	9	\$95.00	9	0	0	0	\$100.00	9	5	0	0	\$90.00	9	5	0	0	\$90.00	9	0	0	0	
DQQ	6	\$95.00	6	0	0	0	\$100.00	6	2	0	0	\$90.00	6	2	0	0	\$90.00	6	0	0	0	
DK	6	\$95.00	6	0	0	0	\$100.00	6	0	0	0	\$90.00	6	0	0	0	\$90.00	6	0	0	0	
EKS	6	\$95.00	6	0	0	0	\$100.00	6	0	0	0	\$90.00	6	0	0	0	\$90.00	6	0	0	0	

1 Day Pre Arrival      Actual Group Block      1 Day Post Departure

Total	36	0	0	0		36	0	0	0		36	0	0	0		36	0	0	
PROPERTY	34					34					34					34			

Enable overbooking ☐

**Post** Cancel

Group: Jones Family Reunion

## Checking the Totals

Once the block numbers have been entered and saved, we will now see updated block totals at the bottom of the column for each day.

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

Display For  
2020-10-22
Prev
Next
Refresh
October
Include Overbooking Limits
REM
Block Holds

Room Type	TOT	Avg Rate	Thu Oct 22					Fri Oct 23					Sat Oct 24					Sun Oct 25			
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE	INV	BLK	PUP	RE
> SQQ	9	\$95.00	9	0	0	0	\$100.00	4	5	0	5	\$90.00	4	5	0	5	\$90.00	9	0	0	
SK	9	\$95.00	9	0	0	0	\$100.00	4	5	0	5	\$90.00	4	5	0	5	\$90.00	9	0	0	
DQQ	6	\$95.00	6	0	0	0	\$100.00	4	2	0	2	\$90.00	4	2	0	2	\$90.00	6	0	0	
DK	6	\$95.00	6	0	0	0	\$100.00	6	0	0	0	\$90.00	6	0	0	0	\$90.00	6	0	0	
EKS	6	\$95.00	6	0	0	0	\$100.00	6	0	0	0	\$90.00	6	0	0	0	\$90.00	6	0	0	
Total			36	0	0	0		24	12	0	12		24	12	0	12		36	0	0	
PROPERTY			34					22					22					34			

Edit Mode
Enable overbooking

Group: Jones Family Reunion

## Block Holds

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

Click **Block Holds** to open the module

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

Display For  
 2020-10-22 ◿ ◀ Prev Next ▶ Refresh **October** ☒ Include Overbooking Limits ☒ REM **Block Holds**

Room Type	TOT	Avg Rate	Thu Oct 22					Fri Oct 23					Sat Oct 24					Sun Oct 25			
			INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE	INV	BLK	PUP	REM	RATE	INV	BLK	PUP	RE
> SQQ	9	\$95.00	9	0	0	0	\$100.00	4	5	0	5	\$90.00	4	5	0	5	\$90.00	9	0	0	
SK	9	\$95.00	9	0	0	0	\$100.00	4	5	0	5	\$90.00	4	5	0	5	\$90.00	9	0	0	
DQQ	6	\$95.00	6	0	0	0	\$100.00	4	2	0	2	\$90.00	4	2	0	2	\$90.00	6	0	0	
DK	6	\$95.00	6	0	0	0	\$100.00	6	0	0	0	\$90.00	6	0	0	0	\$90.00	6	0	0	
EKS	6	\$95.00	6	0	0	0	\$100.00	6	0	0	0	\$90.00	6	0	0	0	\$90.00	6	0	0	
Total			36	0	0	0		24	12	0	12		24	12	0	12		36	0	0	
PROPERTY			34					22					22					34			

Edit Mode ☐ Enable overbooking ☐

Group: Jones Family Reunion

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

R

Block Holds

×

Room Type	Date From	Date To	Holds
> DK	2020-10-22	2020-10-25	0
DQQ	2020-10-22	2020-10-22	0
DQQ	2020-10-23	2020-10-24	2
DQQ	2020-10-25	2020-10-25	0
EKS	2020-10-22	2020-10-25	0
SK	2020-10-22	2020-10-22	0

Amendment

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

**OR**

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



**Block Amendments (2020-10-22 - 2020-10-25)**

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
> SQQ-	2020-10-23	2020-10-24	5	RSI ADMIN	2020-05-06 ...	Hold Override
SK-	2020-10-23	2020-10-24	5	RSI ADMIN	2020-05-06 ...	Hold Override
DQQ-	2020-10-23	2020-10-24	2	RSI ADMIN	2020-05-06 ...	Hold Override

Buttons: **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.

**Block Amendments (2020-10-22 - 2020-10-25)**

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
> SQQ-	2020-10-23	2020-10-24	5	RSI ADMIN	2020-05-06 ...	Hold Override
SK-	2020-10-23	2020-10-24	5	RSI ADMIN	2020-05-06 ...	Hold Override
DQQ-	2020-10-23	2020-10-24	2	RSI ADMIN	2020-05-06 ...	Hold Override

Room Type dropdown menu is open, showing options: DK, DQQ, EKS, SK, SQQ. The **Insert** button is highlighted with a red box.

Buttons: **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.

Block Amendments (2020-10-22 - 2020-10-25)

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
> SQQ-	2020-10-23	2020-10-24	5	RSI ADMIN	2020-05-06 ...	Hold Override
SK-	2020-10-23	2020-10-24	5	RSI ADMIN	2020-05-06 ...	Hold Override
DQQ-	2020-10-23	2020-10-24	2	RSI ADMIN	2020-05-06 ...	Hold Override

Room Type	Date From	Date To	Holds	Created By	Created On	
DK	2020-10-22	2020-10-25	2	ADMIN, RSI	2020-05-06	

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.

Block Amendments (2020-10-22 - 2020-10-25)

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
SQQ-	2020-10-23	2020-10-24	5	RSI ADMIN	2020-05-06 ...	Hold Override
SK-	2020-10-23	2020-10-24	5	RSI ADMIN	2020-05-06 ...	Hold Override
DQQ-	2020-10-23	2020-10-24	2	RSI ADMIN	2020-05-06 ...	Hold Override
> DK-	2020-10-22	2020-10-25	2	RSI ADMIN	2020-05-06 ...	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).*

R

Block Amendments (2020-10-22 - 2020-10-25)

X

Room Type	Date From	Date To	Holds	Created By	Created On	Apply As
SQQ-	2020-10-23	2020-10-24	5	RSI ADMIN	2020-05-06 ...	Hold Override
SK-	2020-10-23	2020-10-24	5	RSI ADMIN	2020-05-06 ...	Hold Override
DQQ-	2020-10-23	2020-10-24	2	RSI ADMIN	2020-05-06 ...	Hold Override
> DK-	2020-10-22	2020-10-25	2	RSI ADMIN	2020-05-06 ...	Hold Override

Insert

Insert All

Apply As

Hold Override

Hold Override

Availability

# Checking the Totals

Once the block numbers have been entered and saved, we will now see updated block totals at the bottom of the column for each day.

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

Display For  
2020-10-22

◀ Prev Next ▶ Refresh

October

☒ Include Overbooking Limits

☐ REM

Block Holds

Room Type	TOT	Avg Rate	Thu Oct 22				Fri Oct 23				Sat Oct 24				Sun Oct 25			
			INV	BLK	PUP	RATE	INV	BLK	PUP	RATE	INV	BLK	PUP	RATE	INV	BLK	PUP	RATE
> SQQ	9	\$95.00	9	0	0	\$100.00	4	5	0	\$90.00	4	5	0	\$90.00	9	0	0	\$100.00
SK	9	\$95.00	9	0	0	\$100.00	4	5	0	\$90.00	4	5	0	\$90.00	9	0	0	\$100.00
DQQ	6	\$95.00	6	0	0	\$100.00	4	2	0	\$90.00	4	2	0	\$90.00	6	0	0	\$100.00
DK	6	\$95.00	4	2	0	\$100.00	4	2	0	\$90.00	4	2	0	\$90.00	4	2	0	\$100.00
EKS	6	\$95.00	6	0	0	\$100.00	6	0	0	\$90.00	6	0	0	\$90.00	6	0	0	\$100.00
Total			34	2	0		22	14	0		22	14	0		34	2	0	
PROPERTY			32				20				20				32			

Edit Mode ☐ Enable overbooking ☐

Group: Jones Family Reunion

## 4. Guest Services (if applicable)

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

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

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

**Group Wizard**

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

Grouping

Name	Price
> Breakfast per Person	\$12.00

← Add  
 Remove →

Name	Price
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
> Welcome Gift	

Post  
Cancel

Group: Jones Family Reunion

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. There is an option to manually remove the guest services from a reservation if they do not apply to a specific guest.

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
> Welcome Gift	\$0.00

← Add

Remove →

Post

Cancel

Group: Jones Family Reunion

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
Pet In Room	\$10.00
Rollaway Bed in Room	
Specific Room # Requested	
Valet Parking	\$20.00
> Welcome Gift	

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.

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	12.00
Welcome Gift	\$0.00

← Add

Remove →

Post

Cancel

Group: Jones Family Reunion

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
Pet In Room	\$10.00
Rollaway Bed in Room	
Specific Room # Requested	
Valet Parking	\$20.00
> Welcome Gift	

## 8. Notes (if applicable)

As this group is an "Individual Pay" group, this article will not discuss the Rooming List, Check-In, and Check-Out tabs of the Group Wizard.

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

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

"THE DELETE STATEMENT CONFLICTED WITH THE REFERENCE CONSTRAINT "FK\_GROUP\_MEMOS\_GROUPS". THE CONFLICT OCCURRED IN DATABASE "BNBEAST", TABLE "DBO.GROUP\_MEMOS"."

To add notes to the Group Wizard:

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

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

Created On	Created By
2020-05-06	ADMIN, RSI

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

1 Insert Delete 3 Post Cancel

Group: Jones Family Reunion

## Wrapping up

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

Group Wizard

×

[Rooming List](#)
[6. Check-In](#)
[7. Check-Out](#)
**8. Notes**

^

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

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
> Jones Family Reunion	JFR102320		2020-10-23	2020-10-25	Solid	2020-10-23	
Mahogany Run PGA	MH PGA 2020		2020-05-22	2020-05-25	Solid	2020-05-22	

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