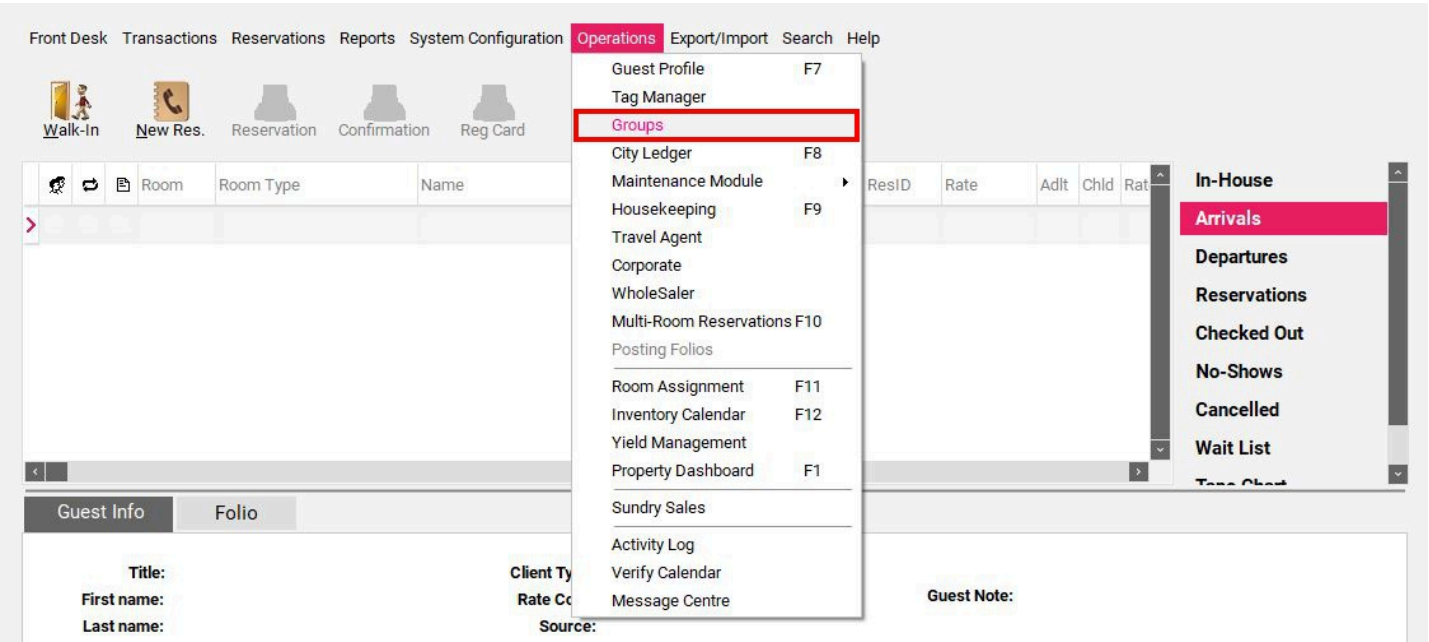# How to Create an Individual Pay Group

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.

1. Primary

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

- **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

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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")

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.

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 that the one indicated, enter the name of the Travel Agent in the **Contact** box, then enter the new commission rate in the **Override Com %** 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**.

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.

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.

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

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*

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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.*

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 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 <u>ONLY</u> 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.*

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.*

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.*

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

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.

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)

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.

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, <u>the pre-existing reservations rates will not change.</u> Only new reservations created will show the updated rate, any existing reservations will need to be manually updated one by one.*

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

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.

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.

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)

Edit Mode

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

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).

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.

Room Type	TOT	Avg Rate	Thu Oct 22					Fri Oct 23					Sat Oct 24					Sun Oct 2			
			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			

Display For: 2020-10-22 | ◀ Prev | Next ▶ | Refresh | October | ☑ Include Overbooking Limits | ☑ REM | Block Holds

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

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

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

OR

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

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.

- 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.

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

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*).

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.

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

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.

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.

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

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.

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