Fidelio Suite 7

Reservations Manual

Front Office Version 7.14
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Introduction

About Suite 7 Reservations

The Suite 7 Reservations Module allows you to perform all the hotel reservation's functions.

In this manual you will find step-by-step instructions to guide you through most of the basic Reservation functions you will require. However, as you get to know and use Suite 7, you will discover that many functions can be performed in more than one way; as well as using shortcut keys, and you will naturally choose the methods you find most convenient.

Reservations can be made for individuals and groups. You can make a new guest, company, agent, or source reservation. Every reservation must have a guest profile attached to it. If a reservation is made and there is no existing profile, then a profile must be created. In addition, a reservation can also have a company, agent, or source profile or any combination of the three profiles attached to it.

A profile is a record of information. It consists of the main information about a guest, company, travel agent, group or other source of a hotel reservation. A photograph of a guest may be attached to the profile. A summary of future reservations and past stays is also included.

After a reservation has been created, you can display, search, update or cancel a reservation. If a reservation has been cancelled, you can reactivate the reservation.

A reservation can be put on the Waitlist if the room type or rate is not available. When the room type or rate becomes available, the hotel can contact the guest and ask if they want the reservation. If the guest wants the reservation, the reservation is taken off the Waitlist and the reservation is accepted.

Various options can be attached to a reservation. For example, a confirmation letter, fixed charges, a message, or a deposit. Changes to the reservation can also be made. For example, authorizing direct billing, adding routing instructions, or splitting a party reservation. With the Events option, Suite 7 Reservations can keep track of future events, critical dates, and calendar periods.

Leisure activities can be booked for hotel outlets. There are two categories of leisure outlets, outlets without services and outlets with services. Outlets without services may include booking a tennis court or a table at a restaurant. Outlets with services may include booking a hairdresser or the spa. The Leisure option is available only if your hotel is configured for Suite 7 Leisure Management Module.
Reservations Speedbar

The Suite 7 Front Office main menu screen has six Suite 7 speed icons located at the top left of the screen. Each speed icon represents one of the main user modules.

To open the Reservations toolbar:

1. From the main Suite 7 screen, click the Reservations icon.

The Reservations toolbar appears to the right of the main menu icons.

This toolbar is the starting point for all Suite 7 Reservation functions.

Note: The Reservations toolbar displays up to seven buttons at a time. Depending on how your system is set up, you may have more or less than seven buttons.

2. To access additional buttons, click the right arrow at the right side of the toolbar.

   The buttons on the left disappear, the other buttons all move left, and the additional buttons appear on the right.

3. To toggle See the previous button display, click the arrow on the left side of the toolbar.

Reservation toolbar icons

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<th>Name of the icon</th>
<th>Description</th>
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<td>New Reservation</td>
<td>Opens the New Reservation dialog box from where you can make a new reservation.</td>
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<td><img src="image" alt="Update Reservations" /></td>
<td>Update Reservations</td>
<td>Opens the Reservation Search dialog box from where you can search for reservations.</td>
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<td><img src="image" alt="Groups" /></td>
<td>Groups</td>
<td>Opens the Groups dialog box from where you can create and update group reservations.</td>
</tr>
<tr>
<td><img src="image" alt="Waitlist" /></td>
<td>Waitlist</td>
<td>Opens the Waitlist dialog box from where you can put a reservation if the room type or rate is not available.</td>
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<td><img src="image" alt="Profiles" /></td>
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<td>Opens the Profile Search screen from where you can create new profiles, search for and display profiles, and update profiles.</td>
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Logging In

To use the Suite 7 Front Office system you must log into the system first. You must have a valid user identification and password.

**Logging into Suite 7 Front Office:**

1. From the desktop, click the Fidelio Suite 7 icon.

   The Login Screen appears.

   ![Login Screen](image)

   ![Login Screen](image)

   ![Login Screen](image)

2. Type your user identification in the User I.D. field box.

3. **Tab** to the Password field box.

4. Type your secret password in the Password field box.

5. Click **Login**, the Suite 7 Front Office main menu screen appears.

   You are now logged into the system.
Navigation Keys

Accelerator keys

Suite 7 Front Office has accelerator keys that allow you fast access to a box on a screen or dialog box. When a letter is underlined you can press the Alt + letter keys and the cursor moves into the appropriate box. For example, on the New Reservations screen the letter “A” is underlined in the Arrival date field. By pressing the Alt + A keys, the cursor moves into the Arrival date field box.

To use the accelerator keys:

From the screen or dialog box, press Alt + letter

The cursor moves into the appropriate box.

Control Keys and Shortcut Keys

Suite 7 Front Office has control keys and shortcut keys that allow you to perform actions directly from the keyboard without having to use the mouse. Using these keys saves you time. For example, to open the Detailed Availability screen you would open the Quick Keys main menu and click on the icon. When you use the control keys, to open the Detailed Availability screen, use the control key Ctrl + D and the Detailed Availability screen opens.

Suite 7 Control keys

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<td>Ctrl + A</td>
<td>Arrivals</td>
</tr>
<tr>
<td>Ctrl + B</td>
<td>Billing</td>
</tr>
<tr>
<td>Ctrl + C</td>
<td>Copy</td>
</tr>
<tr>
<td>Ctrl + D</td>
<td>Detailed Availability</td>
</tr>
<tr>
<td>Ctrl + E</td>
<td>Postings</td>
</tr>
<tr>
<td>Ctrl + F</td>
<td>Floor Plan</td>
</tr>
<tr>
<td>Ctrl + G</td>
<td>Groups</td>
</tr>
<tr>
<td>Ctrl + H</td>
<td>House Status</td>
</tr>
<tr>
<td>Ctrl + I</td>
<td>In-House</td>
</tr>
<tr>
<td>Ctrl + J</td>
<td>Calendar</td>
</tr>
<tr>
<td>Ctrl + K</td>
<td>Internal Use</td>
</tr>
<tr>
<td>Ctrl + L</td>
<td>Room Rack</td>
</tr>
<tr>
<td>Ctrl + M</td>
<td>Messages</td>
</tr>
<tr>
<td>Ctrl + N</td>
<td>New Reservation</td>
</tr>
<tr>
<td>Ctrl + O</td>
<td>Telephone Operator</td>
</tr>
<tr>
<td>Ctrl + P</td>
<td>Control Panel</td>
</tr>
<tr>
<td>Ctrl + Q</td>
<td>Quick Keys</td>
</tr>
<tr>
<td>Ctrl + R</td>
<td>Rate Plan Query</td>
</tr>
<tr>
<td>Ctrl + S</td>
<td>Room Search</td>
</tr>
<tr>
<td>Ctrl + T</td>
<td>Information Book</td>
</tr>
<tr>
<td>Ctrl + U</td>
<td>Update Reservation</td>
</tr>
</tbody>
</table>
### Control Key Menu Item

<table>
<thead>
<tr>
<th>Control Key</th>
<th>Menu Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + V</td>
<td>Paste</td>
</tr>
<tr>
<td>Ctrl + W</td>
<td>Arrivals/stayovers/departures</td>
</tr>
<tr>
<td>Ctrl + X</td>
<td>Cut</td>
</tr>
<tr>
<td>Ctrl + Y</td>
<td>Occupancy Graph</td>
</tr>
<tr>
<td>Ctrl + Z</td>
<td>Calculator</td>
</tr>
<tr>
<td>Shift + Alt + P</td>
<td>Profiles</td>
</tr>
<tr>
<td>Shift + Alt + C</td>
<td>Cashier Functions</td>
</tr>
</tbody>
</table>

**Suite 7 Shortcut keys**

<table>
<thead>
<tr>
<th>Shortcut Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1</td>
<td>Displays the Help window.</td>
</tr>
<tr>
<td>Alt + F4</td>
<td>Closes the active window and logs out.</td>
</tr>
<tr>
<td>F10</td>
<td>Closes all active windows.</td>
</tr>
<tr>
<td>Shift + F10</td>
<td>Displays a pop-up menu.</td>
</tr>
<tr>
<td>Ctrl + F10</td>
<td>Toggles the cursor into/out of the menu bar.</td>
</tr>
<tr>
<td>F12</td>
<td>Moves the cursor from a data field to the grid.</td>
</tr>
<tr>
<td>Alt + Down arrow</td>
<td>Displays a combo box.</td>
</tr>
<tr>
<td>Alt + Spacebar</td>
<td>Toggles the menu bar on/off.</td>
</tr>
<tr>
<td>Tab</td>
<td>Moves forward through the fields /options.</td>
</tr>
<tr>
<td></td>
<td>Moves to the next field and confirms the entry.</td>
</tr>
<tr>
<td>Shift + Tab</td>
<td>Moves backward through the fields/options.</td>
</tr>
<tr>
<td>Ctrl + Tab</td>
<td>Moves forward through tabs.</td>
</tr>
<tr>
<td>Ctrl + Shift + Tab</td>
<td>Moves backward through tabs.</td>
</tr>
<tr>
<td>Escape</td>
<td>Cancels the current action.</td>
</tr>
<tr>
<td></td>
<td>Removes a Combo box before a selection has been made.</td>
</tr>
<tr>
<td>Home</td>
<td>Moves the cursor to the beginning of a field.</td>
</tr>
<tr>
<td>End</td>
<td>Moves the cursor to the end of a field.</td>
</tr>
<tr>
<td>Ctrl + Home</td>
<td>Moves the cursor to first editable field.</td>
</tr>
<tr>
<td>Ctrl + End</td>
<td>Moves the cursor to the last editable field.</td>
</tr>
<tr>
<td>Page Up</td>
<td>Pages forward through the records.</td>
</tr>
<tr>
<td>Page Down</td>
<td>Pages backward through the records.</td>
</tr>
</tbody>
</table>

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The Quick Keys

Suite 7 Front Office allows you to select the Quick Keys main menu from any screen. The Quick Keys are shortcuts to screens, searches, and desktop tools. Using these keys allows rapid access to information without having to leave the section that you are currently working on. For example, a customer is making a new reservation while at the same time asking questions about restaurants in the area. You can use the Information Book quick key for restaurant information instead of aborting the new reservation screen, looking up the restaurant information, closing the Information Book, and reopening the new reservation screen.

To access the Quick Keys main menu:

Hold down the Ctrl key while pressing Q (CTRL + Q)

The Quick Keys main menu appears.

Quick Keys icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Detailed Availability</td>
<td>Ctrl + D</td>
</tr>
<tr>
<td></td>
<td>Control Panel</td>
<td>Ctrl + P</td>
</tr>
<tr>
<td></td>
<td>Maximum Availability</td>
<td>Shift + Alt + M</td>
</tr>
<tr>
<td></td>
<td>House Status</td>
<td>Ctrl + H</td>
</tr>
<tr>
<td></td>
<td>Rate Plan Query</td>
<td>Ctrl + R</td>
</tr>
<tr>
<td></td>
<td>Room Search</td>
<td>Ctrl + S</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
<td>Shortcut Key</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
<td>--------------</td>
</tr>
<tr>
<td><img src="image" alt="Room Rack" /></td>
<td>Room Rack</td>
<td>Ctrl + L</td>
</tr>
<tr>
<td><img src="image" alt="Floor Plan" /></td>
<td>Floor Plan</td>
<td>Ctrl + F</td>
</tr>
<tr>
<td><img src="image" alt="Occupancy Graph" /></td>
<td>Occupancy Graph</td>
<td>Ctrl + Y</td>
</tr>
<tr>
<td><img src="image" alt="Information Book" /></td>
<td>Information Book</td>
<td>Ctrl + T</td>
</tr>
<tr>
<td><img src="image" alt="Telephone Operator" /></td>
<td>Telephone Operator</td>
<td>Ctrl + O</td>
</tr>
<tr>
<td><img src="image" alt="Arrivals/Stayovers/Departures" /></td>
<td>Arrivals/Stayovers/Departures</td>
<td>Ctrl + W</td>
</tr>
<tr>
<td><img src="image" alt="Calculator" /></td>
<td>Calculator</td>
<td>Ctrl + Z</td>
</tr>
<tr>
<td><img src="image" alt="Log Book" /></td>
<td>Log Book</td>
<td>Shft + Alt + L</td>
</tr>
<tr>
<td><img src="image" alt="Calendar" /></td>
<td>Calendar</td>
<td>Ctrl + J</td>
</tr>
<tr>
<td><img src="image" alt="Currency Convert Calculator" /></td>
<td>Currency Convert Calculator</td>
<td>Shft + Alt + R</td>
</tr>
</tbody>
</table>

**The Date field**

The fields are setup in the system configuration; therefore the format of the dates and the separators between the dates may vary from one hotel to another. You can type the date with or without separators. You can also type the current day and month without the year and the year will default to the current year.

Typical date formats include the following:

- MM/DD/YY
- DD/MM/YY
- MM-DD-YY
- DD-MM-YY
- DDMYYYY

There are many date fields in the system. For example, Start date, Arrival date, or Date. The date can be either a specific date or an as of date.
A specific date is when you need to see what happened on that day. For example, you need to see which guests have departed 09/09/99. An as of date is when you need to find out information starting from that date. For example, you need to read the occupancy graph starting from 09/09/99 through 12/09/99.

**Note:** For setting up the date format, see the *Suite 7 Configuration Manual.*

**Changing the date**

The date can be changed by typing a new date or with the use of the calendar. You can also select a range of dates. For example, to reserve a new reservation both the arrival date and departure date must be entered. The From date is the arrival date and the To date is the departure date.

**How to type a new date:**

1. Place the cursor in the *DATE* box.
2. Type the new date in the *DATE* box.
3. Press the *Tab* key, the date is changed.

**How to change the date using the calendar:**

1. Click the drop down arrow next to the Date field box.
   
   ![Calendar]
   
   The calendar appears.

   2. Change the month to a previous month or future month by clicking the horizontal arrows located on the top of the calendar or by pressing the *Page Up* or *Page Down* key.

   3. Change the year to a previous year or future year by pressing the *Ctrl + Page Up* or *Ctrl + Page Down* key.

   4. Place the cursor on the date and click the left mouse button or move the keyboard arrow keys to locate the date and press *Enter*, the date is changed.
How to select a range of dates using the calendar:

1. Click the drop down arrow next to the Date field box, the calendar appears.

2. Change the month to a previous month or future month by clicking the horizontal arrows located on the top of the calendar or by pressing the Page Up or Page Down key.

3. Change the year to a previous year or future year by pressing the Ctrl + Page Up or Ctrl + Page Down key.

4. Select the date which is the From Date.

5. Press the Shift key while clicking the right horizontal arrow on the keyboard until you have highlighted the date that is the To date.

   The date range is highlighted on the calendar.

6. Press Enter, the dates are changed.

Displaying corresponding screens and dialog boxes

Using the blue drill down arrow

When there is no blue drill down arrow next to the field, this indicates that no additional information can be displayed for the field.

Many fields have a blue drill down arrow next to it indicating that there is additional information that can be displayed.

For example, by double clicking in the OO Rooms field box, the Out of Order screen appears.

To display corresponding screens and dialog boxes using the blue drill down arrow:

1. Place the cursor in the field box.

2. Double-click inside the field box with the left-mouse button.

   The corresponding screen appears.
Using the buttons

Many screens and dialog boxes have buttons that are activated. You can open other screens and dialog boxes by clicking these buttons.

The letters within the buttons can be shaded different colours.

*Suite 7 Front Office button colours*

<table>
<thead>
<tr>
<th>Colour of the letters</th>
<th>Example</th>
<th>What the colour represents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gray</td>
<td><img src="image" alt="Gray Button" /></td>
<td>The button is deactivated indicating that you cannot click the button. This can be because the option is not active in your hotel or that you do not have the user rights to use this option.</td>
</tr>
<tr>
<td>Black</td>
<td><img src="image" alt="Black Button" /></td>
<td>The button is activated indicating that you can click the button and another screen or dialog box appears.</td>
</tr>
</tbody>
</table>

Printing screens and dialog boxes

Suite 7 Front Office allows you to print some of the screens and dialog boxes. You can print to a printer or to a file.

There are two ways to print a screen or dialog box:

- Clicking the PRINT button, the contents of the screen or dialog box are sent to the printer.
- Clicking the pop-up PRINT button, which is displayed by clicking the right-mouse button.
To print by clicking the print button:
From the screen or dialog box, click the PRINT button.
The contents of the screen or dialog box are sent to the printer.

Printing using the print pop-up button
Many screens and dialog boxes that do not have a PRINT button can be printed by using the PRINT pop-up button available on the right-mouse click. Printing via the PRINT pop-up button gives you the option of customising the report.
The printing options include:
- Defining the table format.
- Defining headers and footers to appear in each page of the report.
- Defining a header to appear at the beginning of the report only and/or a summary to appear at the end of the report only.
- Previewing the table before printing.
- Saving the table format to a file and accessing previously saved formatting.

Print without selecting printing options:
1. From the screen or dialog box, place the cursor on the white portion of the screen.
2. Click the right-mouse button, a pop-up PRINT button is displayed.
3. Click the pop-up PRINT button, the Grid Print dialog box is displayed.
4. Click PRINT, the contents of the screen or dialog box are sent to the printer in print table format.

Printing with printing options:
1. From the screen or dialog box, place the cursor on the white portion of the screen.
2. Click the right-mouse button, a pop-up PRINT button is displayed.
3. Click the pop-up PRINT button, the Grid Print dialog box is displayed.
4. Click ADVANCE.

The Table Print dialog box appears. It contains seven command buttons and three tabs:

<table>
<thead>
<tr>
<th>Click this button</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Save a document.</td>
</tr>
<tr>
<td><img src="image" alt="Save As" /></td>
<td>Save a file under a new name.</td>
</tr>
<tr>
<td><img src="image" alt="Load" /></td>
<td>Load an existing document.</td>
</tr>
<tr>
<td><img src="image" alt="Properties" /></td>
<td>Set report properties, file name, description, and job name.</td>
</tr>
<tr>
<td><img src="image" alt="Print" /></td>
<td>Send a print table to the printer.</td>
</tr>
<tr>
<td><img src="image" alt="Preview" /></td>
<td>Preview the print table before printing.</td>
</tr>
<tr>
<td><img src="image" alt="Abort" /></td>
<td>Close the Table Print dialog box.</td>
</tr>
</tbody>
</table>

**FORMAT** - used to define the table format.

**PAGE** - used to define headers and footers to appear in each page of the report.

**REPORT** - used to define a header to appear at the beginning of the report only and/or a summary to appear at the end of the report only.
5. Select the REPORT, PAGE and FORMAT tabs and make customizations to the report as required.

6. Click PRINT, the contents of the screen or dialog box are sent to the printer in print table format.

**Report formatting options:**

There are three formatting options available:

- **Style** - specifies the type of grid lines to appear in the table.
- **Horizontal Separator** - specifies a horizontal guide, in addition to the horizontal grid lines, to facilitate reading the lines of the table.
- **Title and Summary options** - indicates that there is to be a table title and/or summary, and specifies whether it should have a grey shaded background to make it easy to recognize. The text for the title and summary is entered in the report tab.

**How to format the report:**

1. On the Table Print report dialog box, click the FORMAT tab.

2. Click one of the **Style** options; the preview displays the selected grid style.

3. Select one or more of the options next to **Title and Summary options**. The preview displays the selected options.
If you selected **TABLE TITLES** or **TABLE SUMMARY**, you must enter the text into the Report tab.

3. Select one of the **HORIZONTAL SEPARATOR** options. The preview displays the selected separator.

4. Type a number in the **EVERY X LINES** box.

**Print dialog box format tab options**

<table>
<thead>
<tr>
<th>Printing format option</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Style</strong></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>There are no grid lines in the print table.</td>
</tr>
<tr>
<td>Horizontal Lines</td>
<td>Only horizontal grid lines, between each section, appear in the print table.</td>
</tr>
<tr>
<td>Vertical Lines</td>
<td>Only vertical grid lines, between each column, appear in the print table.</td>
</tr>
<tr>
<td>Both</td>
<td>Both horizontal and vertical grid lines appear in the print table.</td>
</tr>
</tbody>
</table>

**Title and Summary Options**

<table>
<thead>
<tr>
<th></th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Table Titles</strong></td>
<td>Column headers are printed in the print table. The text for the title is entered in the Report tab.</td>
</tr>
<tr>
<td>Gray Table Titles</td>
<td>The table title is shaded grey.</td>
</tr>
<tr>
<td><strong>Table Summary</strong></td>
<td>Summary text is printed at the end of the print table. The text for the summary is entered in the Report tab.</td>
</tr>
<tr>
<td>Gray Table Summary</td>
<td>The table summary is shaded grey.</td>
</tr>
</tbody>
</table>

**Horizontal Separator**

<table>
<thead>
<tr>
<th></th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>There are no horizontal lines drawn separating the rows in the print table.</td>
</tr>
<tr>
<td>Lines</td>
<td>Horizontal lines are drawn separating the rows in the print table.</td>
</tr>
<tr>
<td>Lines - Every x lines</td>
<td>Horizontal lines are drawn every “x” rows. For example, draw a horizontal line every 2 rows.</td>
</tr>
<tr>
<td>Gray</td>
<td>Alternate blocks of text lines are shaded grey and unshaded. Horizontal lines are not drawn separating the rows.</td>
</tr>
<tr>
<td>Gray - Every x lines</td>
<td>The number of text lines in each block. For example, shade 2 text lines grey, then skip the next 2 text lines, and so on.</td>
</tr>
</tbody>
</table>

**How to define a table title and table summary:**

The **REPORT** tab is used to enter the text for a title to appear only at the beginning of the report and/or a summary to appear only at the end of the report.

1. On the Table Print dialog box, click the **FORMAT** tab.

2. Click the **TABLE TITLES** and/or the **TABLE SUMMARY** options. If you want the title and summary to appear on a grey background, select those options also.

3. Click the **REPORT** tab to display the report page.
3. Type the title text in the HEADER box.
4. Type summary text in the SUMMARY box.
5. Select an OUTPUT OPTION - PRINTER or FILE.

If FILE is selected click on the filename field, enter the name of the output file and click SAVE.

**Note:** The text will not appear unless the appropriate option has been selected on the Format tab.

**How to define headers and footers for each page of the report:**

The PAGE tab is used to define headers and footers to appear in each page of the report.

1. On the Table Print dialog box, click the PAGE tab.
2. Type header text in the HEADER box.
3. Type footer text in the FOOTER box.

**How to preview a report before printing:**

From the Table Print dialog box, click PREVIEW.

The Preview print table screen appears displaying the contents of the screen or dialog box in print table format.

**Preview print table screen command buttons**

<table>
<thead>
<tr>
<th>Click this button</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Zoom In</strong></td>
<td>Enlarge the display of the print table.</td>
</tr>
<tr>
<td><strong>Zoom Out</strong></td>
<td>Reduce the display of the print table.</td>
</tr>
<tr>
<td><strong>Previous Page</strong></td>
<td>Display the first page of the print table.</td>
</tr>
</tbody>
</table>
Click this button | To do this
--- | ---
|  | Turn back the page of the print table by one page.
|  | Advance the page of the print table by one page.
|  | Display the last page of the print table.
|  | Send the print table to the printer.
|  | Close the Preview print table screen.
|  | To select a specific page number to go to.

### Saving and accessing print table files

You can save the print table formatting to a file, with any selected print options, such as titles, headers, and footers. This format can then be accessed at a later date and applied to a current print table. When accessing a print table format that you have saved, you can:

- Print the document as is.
- Edit the document, print and re-save it.
- Delete the document.
- Edit the document properties.

#### Save a print table format to a file

1. From the Table Print dialog box, click New, and enter a filename and description (optional).
   
   The Save button is activated.

2. Format the report as explained in the above sections. You may also preview the table, if desired.

3. On the Report tab, select the File button, the Filename field is activated.

4. If you wish to select a different filename, click on the filename field, select the file from the browser that appears, and click Save.

5. If you make more changes in the printing options, click Save to save the changes.

6. If you want to print the report now, as well as save to a file, click Print.
7. When you are finished, click ABORT to exit the Table Print dialog box.

**Access an existing print table file:**

1. From the Table Print dialog box, click LOAD.

The Documents List dialog box appears.

2. Select the desired Print Table from the list.
3. You may delete a document, view the properties, or load it.

To delete the selected document, click DELETE, and confirm the deletion.

To view and edit the properties, click PROPERTIES.

The Properties dialog box appears.
To load the selected file, click SELECT.

The selected file is loaded and can be edited and printed from the Table Print dialog box.

**Exiting Suite 7 Front Office**

**To exit Suite 7 Front Office:**

1. Close all open screens and dialog boxes.

2. Click the Exit button icon on the Suite 7 Front Office main menu screen, the Login screen appears.
3. Click Exit.

   The Suite 7 Front Office is closed and the desktop appears.
Profiles

A profile is a record of information about a guest, company, agent or group, including previous stays and open reservations. Profiles comprise basic non-varying information: such as the name of a guest (or company, or travel agent), address, language, as well as statistical information about hotel stays in the current and previous years. Such statistical information is stored by Suite 7 and is usually displayed in READ ONLY fields. The user fills in all other fields containing guest information, except fields that have been designated read only.

Whether a field is read only depends on your user rights.

A profile also includes a listing of future reservations and previous stays. Likewise, a guest's picture can be stored in a profile.

How to access the Profile Search screen:
1. From the main Suite 7 screen, click the Reservations icon.

   ![Reservations Icon]

   The Reservations toolbar appears to the right of the icons.

2. Click the Profiles icon.

   ![Profiles Icon]

   The Profile Search screen appears.

Creating a New Profile

To create a new profile:
1. From the Profile Search screen, click NEW.

   The New Profile selection box appears.

2. Click on the appropriate radio button to select the profile type you require.

3. Click OK.

   The Profile screen of your choice appears.

   ![Profile Screen]

   **Note:** The Profiles screen is definable by each hotel. Your screen may look different.

The Profile screen for all the profile categories consist of five screens each one represented by a tab.
Profile screen tabs

<table>
<thead>
<tr>
<th>Tab heading</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest/Company/Agent/Group/Source</td>
<td>A record of the main information about a guest, company, travel agent, group, or other source.</td>
</tr>
<tr>
<td>More Fields</td>
<td>A continuation of the Profile screen.</td>
</tr>
<tr>
<td>Future</td>
<td>A summary of future reservations.</td>
</tr>
<tr>
<td>History</td>
<td>A record of past stays.</td>
</tr>
<tr>
<td>Picture</td>
<td>A photograph of a guest that can be stored using a scanner.</td>
</tr>
</tbody>
</table>

New Profile selection box options

<table>
<thead>
<tr>
<th>Option</th>
<th>To create a new profile for</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td>An individual guest.</td>
</tr>
<tr>
<td>Company</td>
<td>A company that reserves rooms.</td>
</tr>
<tr>
<td>Travel Agent</td>
<td>A travel agent that reserves rooms.</td>
</tr>
<tr>
<td>Reservation Source</td>
<td>A source of reservations other than companies or travel agents.</td>
</tr>
<tr>
<td>Group Master</td>
<td>A group coordinator/organizer.</td>
</tr>
</tbody>
</table>

Creating a profile for an individual guest

You can create a profile specifically for an individual guest.

To create a new individual guest profile:

1. From the Profile Search screen, click New.
   The New Profile selection box appears.
2. Click the Individual radio button.
3. Click OK.
   The Profile screen appears displaying "Individual" in red at the bottom of the screen. The field Last Name is in bold letters. This indicates that it is a mandatory field. All other fields are optional.

   **Note:** Whether a field is mandatory or optional is entirely definable by the hotel's system administrator. As the Profiles screen is definable by each hotel, your screen may look different.

4. Fill in the Last Name field and press the Tab key.
   Make sure to spell names with correct capitalization. The way a name is entered in the Profile screen is the way it will appear in letters and folios. As searches are not case-sensitive, they will not be affected by capitalization.
5. The cursor moves to the next field (First Name) and the SAVE option at the bottom right is activated.
6. Tab or use the mouse to move to the next field. Fill the optional fields by typing information or selecting information from the drop-down lists.
   Most of the Profile screen is self-explanatory.
6. Press ENTER or click SAVE.

The guests profile is saved.

When the information has been saved, additional options at the bottom of the Individual Profile screen become activated.

Note: When Save in History is not checked, the guest will be removed from the guest file 14 days after departure, if there are no outstanding reservations or balances. The 14 day interval can be changed in the configuration. See the Suite 7 Configuration Manual.

Profile Screen Individual Guest

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIP</td>
<td>Indicates a guest is to receive VIP treatment, and at what level, or if he is a regular guest.</td>
</tr>
<tr>
<td>Save in History</td>
<td>Checking this saves the profile. Either checked or blank can be made the default.</td>
</tr>
<tr>
<td>Features</td>
<td>A drop-down list with room preferences: smoking or non-smoking rooms, preferred floor, near to the elevator, etc. The drop-down list is user-definable. When you block the guest's room or check him in, Suite 7 searches only for rooms with these features.</td>
</tr>
<tr>
<td>Rate Code</td>
<td>If the guest has a special rate code, you should enter it here. This rate code is then suggested every time you enter a new reservation.</td>
</tr>
<tr>
<td>Pref. #</td>
<td>Preferred room number. If the specified room is available, then it will be proposed when blocking the guest's reservation or when checking the guest in.</td>
</tr>
<tr>
<td>Member #</td>
<td>Some hotels have membership clubs, which, like airline regular passenger clubs, confer certain benefits.</td>
</tr>
<tr>
<td>Mailing</td>
<td>The user-definable drop-down list is of occasions for sending a letter to the guest: Christmas, his birthday, etc.</td>
</tr>
<tr>
<td>Interest</td>
<td>A drop-down list of special guest interests: preferred sports, theatre, etc. This information can then be used for targeted mailings.</td>
</tr>
<tr>
<td>Folio Curr.</td>
<td>The entry in this field, to be chosen from a drop-down list of currency codes, controls the currency the folio will be printed in at check-out.</td>
</tr>
</tbody>
</table>

Profile screen option keys

<table>
<thead>
<tr>
<th>Option key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate Link</td>
<td>Links the profile to a specific rate code(s).</td>
</tr>
<tr>
<td>Guest Info</td>
<td>Stores the numbers and details for the guest's, club membership cards, frequent flyer cards, and credit cards. On agent, company, group and source profiles, the option changes to store credit cards and to set master accounts.</td>
</tr>
<tr>
<td>New</td>
<td>Opens a new Profile screen.</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Option key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merge</td>
<td>Merges two existing profiles of the same type. A company profile can be combined only with another company profile. It merges revenue, room nights, cancellations, and other statistics, but not details such as address.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the current profile unless checked in, reserved, or cancelled.</td>
</tr>
<tr>
<td>Select</td>
<td>Used to attach a different profile to the currently selected reservation.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves a new profile or newly recorded or changed information.</td>
</tr>
<tr>
<td>Search</td>
<td>Displays the Profile Search screen.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the Profile screen, giving the option to save the changes or not.</td>
</tr>
</tbody>
</table>

### Adding more information to the guest profile

#### To add information to the Profile screen:

Click on the More Fields tab, or press ALT + O.

The Profile More Fields screen appears.

**Note:** The fields in the Special Fields section of the screen are controlled by user rights and are optional.

Most of the fields on the Profile More Fields screen are self-explanatory. The search area is identical to that of the profile screen. In the fields area, most fields are read-only, displaying information about the last stay, a statistical summary of all previous stays (including no shows and number of cancellations, and when the profile was created and by whom (UserID).

Active fields allow the user to enter when the last contact with the guest took place, and whether he is entitled to a special rate.

The Company field in this tab can be used to link the guest to a company. If a company is selected here, anytime a new reservation is made for this guest it is automatically linked to the specified company. "Company" should only be entered in the profile for guests whose stays are always booked by their company.

The procedure for creating the other profile types; company, travel agent, reservation source, and group master, is identical to that for an individual. Whatever the differences that exist are on the Guest and More Fields screens, which are outlined for each profile category below.

Remember though, that screen fields are user-definable. Therefore, what you have on your screen may not be identical to this manual.

#### Profile More Fields screen: Special fields section

<table>
<thead>
<tr>
<th>Field</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special Fields radio buttons:</td>
<td></td>
</tr>
<tr>
<td>Normal</td>
<td>Ordinary terms of payment.</td>
</tr>
</tbody>
</table>
**Profiles**

<table>
<thead>
<tr>
<th>Field</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blacklist</td>
<td>Guest has been placed on the blacklist. This usually indicates that the hotel does not wish to accept this guest. A warning message will be displayed when selecting a blacklisted profile for a new reservation.</td>
</tr>
<tr>
<td>Cash Only</td>
<td>Guest can be accepted on cash-only basis. A warning message will be displayed when making a reservation for this guest.</td>
</tr>
<tr>
<td>B/L Message</td>
<td>To give a short explanation for blacklisting.</td>
</tr>
<tr>
<td>A/R #</td>
<td>Accounts receivable number.</td>
</tr>
<tr>
<td>Master Account</td>
<td>Provides a method to link, for example, companies with the same parent company, or different branches of the same travel agent, for statistical purposes.</td>
</tr>
<tr>
<td>Availability Override</td>
<td>Certain guests or companies may be so valuable, that you would like to give them a room, regardless of how overbooked the hotel is. Checking this field will allow the user to overbook the hotel, regardless of whether the user has the right to do so or not.</td>
</tr>
</tbody>
</table>

**Future, History, and Picture**

The History tab is a record of all previous stays, and the Future tab automatically displays the information regarding new reservations. The Picture tab is to store a guest's picture.

**Viewing future reservations**

**To view future reservations:**

To see any future reservations for the guest, click the Future tab.

A screen appears with data for the guest's future reservations. The screen's fields contain standard reservation data. The standard reservation fields are explained in Making a Reservation from the New Reservation screen. You can edit a future reservation by clicking the reservation button.

You can navigate across the screen with the horizontal scrollbar.

---

**Note:** The summary button is not available for individual profiles. It is only available for company, agent, and source profiles.

**History**

To obtain a list of a guest's previous stays and a statistical breakdown of the revenue those stays generated, click the History tab.

As with the Future screen, all the fields here contain standard reservation data, span roughly two screens, and are navigated with the horizontal scrollbar, as shown below.

The History screen offers several options.
**How to view revenue details:**
Click **Revenue Details**.
The Revenue Details dialog box appears displaying the breakdown of the guest's spending.

**How to view the details of a guest's previous stay:**
Highlight a previous stay on the screen, and click **Details**.
The Guest History dialog box appears displaying a summary of the data related to the guest's previous stay.

---

**Note:** that some users, depending on user rights, may be able to modify the guest history.

---

**How to view a guest folio:**
1. Click **View Folio**.
   A File Path dialog box may appear asking you to enter the path for folios.
2. If required, enter the File Path.
   The Folio History screen appears.

**How to print folio history:**
1. Click **View Folio**.
   A File Path dialog box may appear asking you to enter the path for folios.
2. If required, enter the File Path.
   The Folio History screen appears.
3. Click **Print**.
   The folio history is sent to the printer.

**How to view a guest's turnaways:**
Click **Turnaway**.
The Turnaway dialog box appears displaying the summary of the guest's turnaway's.

**How to view a guest's leisure history:**
Click **Leisure History**.
The Leisure History dialog box appears.

**How to view accompanying guest history:**
Click **Accompanying**.
If a guest has previously accompanied this guest then the Accompanying dialog box appears.
To view the accompanying guest record, double-click on the record and it will be displayed as read-only.
**Picture**

A scanner can be used to scan in and store a picture of the guest. The guest's picture can also be imported from another file.

**How to view a guest's picture that is on file:**

Click the PICTURE tab.

The picture appears.

**How to edit a picture title:**

1. Click the PICTURE tab.
   
   The picture appears.
2. Click Edit.
   
   The Picture Edit dialog box appears.
3. From the Picture Edit dialog box, type the new picture title in the Description field box.
4. Click Close.
   
   The picture with the new picture title appears.

**How to print a picture:**

1. Click the PICTURE tab.
   
   The picture appears.
2. Click Print.
   
   The Preview screen appears displaying the picture.
3. Click Print.
   
   The picture is sent to the printer.

**How to scan in, import, or export a picture:**

1. Click the PICTURE tab.
   
   The picture appears.
2. Click Scan.
   
   The Scan dialog box appears.
3. Follow the scanning instructions that are included with your scanner to scan in a picture, import a picture, or export a picture.

**Note:** When a scanner component is installed on your computer, the Import and Export buttons are activated. When a scanner is connected to your computer, the Scan button is activated.

4. Click Abort.
   
   The Scan dialog box is closed.

**How to delete a picture:**

1. Click the PICTURE tab.
   
   The picture appears.
2. Click Edit.
The Picture Edit dialog box appears.
3. Select the picture that you want to delete and click DELETE.
4. Click CLOSE.
The picture is deleted.

**How to change the order of the pictures:**
1. Click the PICTURE tab.
   The picture appears.
2. Click EDIT.
   The Picture Edit dialog box appears.
3. Click the DOWN arrow to move the pictures down or click the UP arrow to move the pictures up.
4. Click CLOSE.
   The picture Edit dialog box is closed.

**How to hyperlink an item:**
1. Click the PICTURE tab.
   If a picture was already added then it is displayed.
2. Click HYPERLINKS.
   The Hyperlinks dialog box appears.
3. Click NEW to add a new hyperlink.
4. Search for and locate the item you want to set the hyperlink to.
5. Click OPEN.
   The item is hyper linked and the path displayed in the grid.
6. Click CLOSE.
   The Hyperlink dialog box is closed.

**How to view a hyperlinked item:**
1. Click the PICTURE tab.
2. Click the HYPERLINK button.
   The Hyperlinks dialog box appears.
3. Click OPEN to view the hyperlinked item.
   The file will be opened by the applicable application if installed on that machine.
4. Click CLOSE to close the viewer.
5. Click CLOSE.
   The Hyperlink dialog box is closed.
The Company/Agent/Source profile

The Agent, Company, and Source Profile screens are identical.

Notice that the field SEARCH NAME is highlighted, meaning that it is mandatory.

The difference between Search Name and Full Name is this:

Let's say the full name of a company is New England Real Estate and Portfolio Investment, Inc. obviously, it would be cumbersome to type that every time you wanted to get the company's profile on screen.

Furthermore, you may forget the exact name. For a search name, you could just call it NE Real Estate.

Notice that the only two option keys on the lower right that are highlighted; that is activated, on a blank Company profile screen are Search and Close, just like with Individual. You can easily verify that as soon as you type in the Search Name, the Save option is also highlighted.

Move from field to field by pressing the TAB key, or clicking in the new field you want with the mouse.

The left-most column is for company information and is fairly straightforward. The center column relates to the person representing the company.

The Company Profile More Fields screen contains extremely important information for a hotel.

In the left-most column, comparing the number of night and stays with the number of cancellations and no-shows provides a statistical basis for re-evaluating pricing arrangements with companies. It is an indication of how much of Potential Rm Nights and Potential Revenue are likely to be realized.

Company, Agent and Source profiles may be marked as 'Inactive'. This means that these profiles will not be displayed, by default, when performing a profile search. To include inactive profiles in the search results the check box INCLUDE INACTIVE must be selected.

**Note:** When the user marks this INACTIVE checkbox in the profile, Fidelio will check Frequent Flyer, Travel Agent Processing and Accounts Receivable to see if the profile has an open account in any of these modules. If so, a message will be displayed and the profile will not be marked as inactive.

Company Profile More Fields screen

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAP Information</td>
<td>(Travel Agent Processing)</td>
</tr>
<tr>
<td>Currency</td>
<td>Currency for paying commissions.</td>
</tr>
<tr>
<td>Commission</td>
<td>Percentage of commission payable.</td>
</tr>
<tr>
<td>Record Type</td>
<td>Indicates the type of profile: C-Company, T-Travel Agent, S-Source, G-Group, and blank-Individual guest</td>
</tr>
<tr>
<td>S and C ID</td>
<td>The ID which links this profile with the Sales and Catering module.</td>
</tr>
</tbody>
</table>

Special Fields radio buttons:

- Normal: Ordinary terms of payment.
<table>
<thead>
<tr>
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</tr>
<tr>
<td>A/R #</td>
<td>Accounts receivable number.</td>
</tr>
</tbody>
</table>
| Master Account   | Provides a method to link, for example, companies with the same parent company, or different branches of the same travel agent, for statistical purposes.  
|                  | A lamp indicates if the profile is a master account.                       |
| Comm%            | Allows the entry of a specific commission % for a specific travel agent.    |
| Availability Override | Certain companies may be so valuable, that you would like to give them a room, regardless of how overbooked the hotel is. Checking this field will allow the user to overbook the hotel, regardless of whether the user has the right to do so or not. |

**Company Profile screen fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acct Contact</td>
<td>Accounting contact person.</td>
</tr>
<tr>
<td>IATA/Corp. #</td>
<td>The IATA number is the number assigned to a travel agent by the International Association of Travel Agents. The hotel may assign a corporate number to the company for its own internal purposes.</td>
</tr>
<tr>
<td>Ctrct Rate</td>
<td>A contracted room rate.</td>
</tr>
<tr>
<td>Inactive</td>
<td>Marks the profile as inactive, so that it will not be displayed unless the search option 'Include Inactive' is selected.</td>
</tr>
</tbody>
</table>

**Future reservations**

You can view future reservations for a company, agent, and source.

**How to view future reservations for a company:**

To see any future reservations for the company, click the FUTURE tab.

A screen appears with data for the company's future reservations. The screen's fields contain standard reservation data. The standard reservation fields are explained in Making a Reservation from the New Reservation screen. You can edit a future reservation by clicking the reservation button.

You can navigate across the screen with the horizontal scrollbar.

**Note:** The summary button is not available for individual profiles. It is only available for Company, Agent, and Source profiles.
A summary of the projected number of nights and revenue can be displayed for Company, Agent, and Source profiles.

**How to display the summary of future reservations:**

Click **SUMMARY**.

The Future Reservations Summary box appears.

**Projected Revenue**

You can enter the projected revenue and number of rooms per month for a year per market segment per company, agent or source (not individual).

The budget screen allows hotels to enter figures for each year. The AGENTBDGT procedural report then provides a comparison of the projected vs. the actual revenue.

**To enter the projected revenue and number of rooms:**

1. Click **BUDGET**.
   
   The Budget dialog box appears.
2. Select the desired market segment in the left-hand side of the dialog box.
3. Enter the Revenue and number of Rooms per month for each month.
4. Select the next market segment.
   
   When you select another market segment, a green check appears at the end of the line of the market segment you just finished.
5. When all market segments are complete, click **OK**.
   
   The Budget dialog box closes.

**History**

You can view past reservations for a company, agent, and source. Summary information is available for all group profiles.

**Group Master Profile**

A group master profile contains details of the person or company who is making the group booking. The profile of a group master contains abbreviated but similar details to the company profile, both the Profile and More Fields screens. The summary information is not available for group profiles as displayed on the History screen.

**Editing a Profile**

Once a profile exists, you can:

- Edit it.
- Delete it.
- Link it to a rate code.
- Open or edit a guest info.
- Merge it with another profile.
- View the award points earned.
The first editing task we will discuss here, though, is simply searching for a profile. A profile search may be limited to a specific profile type; Individual, Company, etc., although a search can include profiles of all types.

**Searching for a profile**

**How to search for a profile:**

1. Click on the **PROFILES** button.
   
   The Profile Search screen appears.

2. To limit the search of a profile to an individual profile (or any other type):

3. Click on the **View By** drop-down list at the bottom of the screen.
   
   The drop-down list opens, and you can see the various **View By** criteria.

4. Move the down arrow to Individual (or any other type you require) and press the **TAB** key.
   
   The Profile Search screen now displays only individual profiles.

**How to find a profile:**

1. Type the first few letters of the last name in the Search Name field.

2. Press the **TAB** key.
   
   All the last names that start with those letters, and only those names, appear on the screen. This is the most commonly used method for searching for a profile.

**How to use additional search methods:**

You can search for a profile by:

- First Name.
- City.
- Membership number.
- Guest card number
- A/R#.

For example, say you wish to search for the name Adams:

1. In the Search Name field, type "Ad" and press the **TAB** key.
   
   The profiles whose last names begin with "Ad" appear.

2. Highlight Tina Adams and press **ALT + E** or press **ENTER**.
   
   The Tina Adams profile appears.

   Notice that at the lower left side of the Profile screen is a list of all profiles of the same type as that selected, in this case Individual Guest. As you move up and down the list, the highlighted profile appears in the dialog box.

**Deleting a profile**

**To delete a profile:**

1. In the Search Profile screen, select the profile you want to delete.

2. Press **ENTER** or click **EDIT**.

3. Click **DELETE**.

4. Click **OK** when you are asked for confirmation.
Profiles

Note: If the guest you chose is checked in, has an existing reservation, or a cancelled reservation, you cannot delete the profile. Delete not possible

Copy/Paste Functionality

The copy/paste functionality allows you to copy profile information from an existing profile into a new profile or into an already existing profile. This saves the user having to re-type profile details.

The amount and type of information that can be copied can be defined by the property under Configuration->Miscellaneous->Profile Copy Options.

How to copy profile details to a new or already exiting profile:

1. Click on the Profiles button.
   The Profile Search screen appears.
2. Locate the profile whose information you wish to copy.
3. Click Edit.
   The profile screen is displayed.
4. Click Copy.
   The information is saved in a buffer and the Paste button is now active.
5. Click New to open a new profile screen or select a profile from the profile list.
   The profile screen is displayed.
6. Click Paste to copy the profile information.
   All the information which was defined to be copied is displayed in the profile.

Linking a rate code to a profile

Your hotel may have an agreement with a company, agent, or regular guest to charge them a specific rate. To ensure that this company or agent receives this rate every time they make a reservation, Suite 7 allows you to link a specific rate code or codes to a profile.

How to link a rate code to a profile:

1. Highlight the profile you want in Profile Search and click Edit.
   The profile you want appears.
2. Click Rate Link.
   The Rate Linkage dialog box appears.
   Note: This feature is controlled by the Rate Linkage parameter.
3. At the Rate Code field under New, click on the down arrow.
   The Rate Code drop-down list opens.
4. Select the rate code(s) you want to link to the profile.
The drop-down list closes and the rate code(s) you have selected appears in the Rate Code field.

5. Click OK.
   The chosen rate code(s) appears in the screen.

   **Note:** To clear a field, simply highlight it and press the Delete key on the keyboard.

**How to copy a rate code from one profile to another:**

1. On the Rate Linkage dialog box, under Copy, click the down arrow in the From Profile field.
   The Profile Search screen appears over the Rate Linkage dialog box.

2. Select a profile and click OK, or press Alt+O.
   The name of the profile appears in the From Profile field, and the number of the profile appears to its right.

3. In the To Profile field, click on the down arrow.
   The Profile screen appears again.

4. Repeat step 2.
   The Copy option is now activated.

5. Click Copy.
   A Confirm query appears.

6. Click Yes to copy, or No to cancel the operation.

**How to delete the rate code from the list:**

1. Select the rate you want to delete.
   The Delete option at the bottom right is activated.

2. Click Delete.
   A confirmation message appears.

3. Click Yes.
   The rate code is deleted.

Hotels, like airlines, often have clubs for regular clients. A hotel guest card, like its airline counterpart, confers certain benefits, and is sometimes used as a credit card. Guest info includes the capability for storing membership data for frequent flyer clubs maintained by airlines, and frequent guest clubs.

Guest info can also store credit card data, and when you make a reservation, you can select that credit card as the means of payment, saving you from having to enter the number again. While the frequent flyer and frequent guest options are open only for individual profiles, the credit card option is valid for all profile types.

Virtual numbers serve the guest as the guest's private line once they check in, until they check out. Virtual numbers can be assigned permanently to an individual guest profile.

The master account option is valid for all profile types, except individual profiles. The master account option provides a method for linking companies with the same parent company, or different branches of the same travel agent, for statistical purposes. In this option, you can select an existing account or create a new one.
When an individual profile is saved, or an existing one opened, the Guest Card option is activated. This option applies only to individual profiles.

The procedure for filling in the Guest Info Master Account is the same, although the dialog box requires somewhat different information.

The select button is active only when this screen is displayed from within a reservation, i.e., when selecting a guest card or credit card.

**How to open or edit guest info:**

1. Click on the GUEST INFO button at the bottom of an individual profile.
   
   The Guest Info dialog box appears.
   
   If the profile already includes a guest card or credit card, the Edit option would be activated. As the above profile does not have either, only the New option is activated.

2. Click NEW, or press ALT+N.
   
   The Guest Card Edit dialog box appears.

3. Fill in the required details and click OK to save.
   
   As in all Suite 7 dialog boxes, the mandatory fields are highlighted.
   
   Entering credit card information is identical to entering guest card information.

**How to select the Master Account:**

**Note:** The procedure for filling in the Guest Info Master Account is similar, but the Master Account dialog box that opens contains only one field: the Master Account drop-down list.

1. Click on GUEST INFO at the bottom of a company, agent, or group profile.
   
   The Guest Info dialog box appears.

2. Click on the MASTER ACCOUNT radio button.

3. Click NEW.
   
   The Master Account dialog box appears.
   
   If a Master Account has already been assigned, it will appear in the Guest Info listing when you click the radio button, and the New button will not be activated.

   **Note:** The select button is active only when this screen is displayed from within a reservation, i.e., when selecting a guest card or credit card.

4. Select the Master Account from the drop-down list.
   
   If the name of the master account does not appear:
   
   a. Click NEW.
      
      The Master Accounts listing dialog box appears.
   
   b. Click NEW.
      
      The Edit Master Account dialog box appears.
   
   c. Type in the Code and Description.
   
   d. Click OK.
e. Click ABORT.
   The Edit Master Account dialog box closes.
f. In the Master Account dialog box, click CLOSE.
g. Now, select the Master Account from the drop-down list.
   The name of the Master Account appears in the Guest Info dialog box.

5. In the Guest Info dialog box, click CLOSE.

How to delete a guest card, credit card, or master account:
1. From the guest profile, click GUEST INFO.
   The Guest Info dialog box appears.
2. If there are credit card(s), guest card(s), or master account(s) attached, highlight the one you want to delete.
3. Click DELETE.
   The card or account is deleted.
4. Click CLOSE.
   You are returned to the guest profile.

Linking a permanent virtual number to a guest profile
Virtual numbers serve the guest as the guest's private line once they check in until they check out. Virtual numbers can be assigned permanently to an individual guest profile. Once a virtual number has been linked to a profile it is marked as permanent and cannot be used for another assignment. At check-in, the respective number will be displayed in the configured pool of numbers (assigned VN number dialog box), and will be available for selection.

   Note: The use of Virtual numbers and the available functionality depends entirely on the capabilities and the feature set of the external system and the interface used in the hotel.

How to link a permanent virtual number to a guest profile.
1. From the Profile screen, click GUEST INFO.
   The Guest Info dialog box appears.
2. Click the Virtual Numbers radio button.
3. Click NEW.
   The Assign Virtual Number dialog box appears.
4. From the Assign Virtual Number dialog box, click the Pool drop down arrow and select the line to which you want to assign the number.
   The Pool list contains the list of the telephone lines connected to the room.
5. From the list of extension numbers, scroll to and highlight the number you wish to assign.
6. Click ASSIGN.
   The Assign Virtual Number dialog box is closed. The Guest Info dialog box appears with the assigned number and Permanent displayed in the Permanent field.
7. From the Guest Info dialog box, click CLOSE.
The Guest Info dialog box is closed and the Profile screen appears.

**Merging profiles**

In the Suite 7 Reservations module, you can merge profiles of the same type. That is, you can merge two individual profiles, or two company profiles, but not an individual and a company profile.

When you choose a profile, and merge another with it, the revenue details, room nights, cancellations, and other statistics are merged, and the second profile is deleted from the database.

Let’s say that the database of your hotel has two profiles on the name of Jim Abrams. You check and find that the information on one of the profiles, the second in the list, is incomplete, and upon further inquiry, it turns out that they are the same guest.

**How to merge two profiles:**

1. Click **Profiles**.
   
   The Profile Search screen appears

2. Highlight the profile you want to merge and click OK.
   
   That profile appears with the Merge option activated. This is the profile that will be kept.

3. Click **Merge**.
   
   The Profile Search screen appears.

4. Highlight the profile you want to be merged and click OK.
   
   This is the profile that will be deleted.

   The Compare Profile box with a Merge Profile query opens.

5. Click **Yes** or press **ALT+Y**.
   
   The profiles have merged. Close the profile.

   To check if the Merge has taken place, open the Profile Search screen again. You can easily verify that only one Jim Abrams profile appears now, and that the information it contains matches with that of the profile in the To column of the Merge Profiles query box.

**Guest Awards**

Guests with qualifying frequent guest or frequent flyer cards can earn award points with each stay. The points are awarded during the night audit after check-out or, alternatively, manually upon checkout. Award programs and points information can be accessed from the guest profile. You can:

- Assign an award program to the reservation.
- Delete an award program from the reservation.
- View the points status.
- Calculate award points.
- Award an award when the necessary points have been earned.
**How to assign an award program:**
1. From the Profiles screen, click the FUTURE tab.
   The Future page appears.
2. Click AWARDS.
   The Guest Award dialog box appears.
3. Click NEW.
   The Edit Award Card dialog box appears.
4. Select the card from the drop-down listing.
   If no card is defined on the guest profile, the Guest Card Edit dialog box appears.
   Fill in the fields and click OK.
   The selected credit card and the member number are displayed.
5. Click in the AWARD TYPE field to display the available choices, and select the desired award.
   The number of points awarded for this billing, as well as the total number of points accumulated toward this reward are displayed.
6. You may type in an award ID, as well as any text message you may wish to enter for your own purposes. These fields are not used by the system.
7. Click OK.
   You are returned to the Guest Awards dialog box, which displays the award program in the listing.
   When an award program has been assigned to a guest, the "Award" lamp appears on the Reservations screen.

**How to delete an award program:**
1. From the Profiles screen, click the FUTURE tab.
   The Future page appears.
2. Click AWARDS.
   The Guest Award dialog box appears.
3. Select the award program to be deleted.
4. Click DELETE.
   You are asked to confirm the delete.
5. Click YES.
   The selected award program is deleted.

**How to view/edit awards:**
1. From the Profiles screen, click the FUTURE tab.
   The Future page appears.
2. Click AWARDS.
   The Guest Award dialog box appears.
3. Select the award program to be edited.
4. Click EDIT.
The Edit Award Card dialog box appears for the selected award.
Edit the fields as described in step 4 through step 6 of the procedure "To assign an award program".

5. Click OK.
You are returned to the Guest Awards dialog box, which displays the edited award in the listing.

Assigning the Award
When a guest has earned enough points to qualify for an award, the "Awarded" button on the Guest Award dialog box will be activated so that the award can then be authorized. However, the awarded button is not activated until the day after check-out, since the points are automatically calculated during Night Audit processing.

If a guest has earned the required points for a reward during the current stay, it is possible to manually calculate the points so that the guest can receive the award before he leaves the hotel.

How to authorize an award when the points have already been automatically calculated:
1. From the Profiles screen, click the FUTURE tab.
   The Future page appears.
2. Click AWARDS.
   The Guest Award dialog box appears.
3. Select the award that has enough points to earn the award.
4. Click AWARDED.
   The selected award is credited to the guest, and the required points are subtracted from the current point balance and the AWARDED button is no longer activated.

How to manually calculate award points and authorize an award:
1. From the Profiles screen, click the FUTURE tab.
   The Future page appears.
2. Click AWARDS.
   The Guest Award dialog box appears.
3. Select the award that has enough points to earn the award.
4. Click CALCPOINTS.
   The current points are subtracted from the current point balance, and the selected award is credited to the guest.

   If you only want to view the status of the awards, without making any changes, you can open the Guest Awards dialog box from the main Guest page, rather than going to the Future page. When accessing the Guest Awards from the main Guest page of the Profile, only the View button will be activated.
Easy Letter

The Easy Letter option provides an easy-to-use interface to produce quick letters to guests, companies, etc, using user-defined templates. Letters sent via the Easy Letter option are stored in history for future reference. Easy Letter may also be used to send letters to entities that do not have an existing profile, however, these letters are not saved or stored.

The easy letter option is accessible from:

- Miscellaneous menu
- Guest Profile

**To create an easy letter via the guest profile:**

1. On the RESERVATIONS menu click PROFILES, select a profile, then click EASY LETTER.

2. If an easy letter has already been sent to this guest then the Easy Letter History screen is displayed.

3. Click New to create a new easy letter.

   The Easy Letter screen is displayed.
4. Click on the drop-down arrow in the LETTER NAME field and select the easy letter template required.

5. Click OK, the Print Easy Letter screen is displayed.

6. Click VIEW to open the Fidelio Text Editor and view or edit the easy letter. If no profile was selected then the letter will be exported to an RTF file with the prefix 'pr' for Easy Letters and the name of the letter changed to SPECIAL.

7. Click PRINT to print the easy letter.

8. Click E-MAIL to open the Send Mail dialog box. (Only available if the Mail system is configured.) If an mail address was located it will be displayed in the To field. If no mail address is found, or if there is no profile for this letter, the field will remain blank. If the user enters an email address and there is an active profile, Fidelio will ask if the email should be saved to the profile.

9. Click FAX to open the fax dialog box. (Only available if a fax interface is configured.) If a fax number is located it will be displayed in the FAX NUMBER field. If no fax number is found, or if there is no profile for this letter, the field will remain blank. If the user enters a fax number and there is an active profile, Fidelio will ask if the fax number should be saved to the profile.

10. If the user marks the check box SAVE AS MY DEFAULT, then the same functionality as for other email functions will be used. The details of the fields Subject, Description, Contact and Phone will be stored for future use by the same user.

11. If View, Print, E-Mail or Fax was selected then the button CLOSE is displayed and clicking this will save the record in history with the method SAVED. However, the letter will not be sent to any output function such as fax, email or printer. The user can then print, fax or email the letter at any time in the future.

12. If no function was used the button ABORT allows the user the exit without saving.

**Note:** The available options are determined by the system setup, i.e. if the hotel does not have a mail system configured, the E-MAIL button will not be available. Likewise, if a fax interface is setup, then the FAX button will be available.

**Note:** Easy letter templates are defined under Setup->User Configuration->Edit Text Files.
3

Reservations

Reservations can be made for individuals and groups. Group reservations are explained in Groups.

You can make a new guest, company, agent, or source reservation.

Every reservation must have a guest profile attached to it. If a reservation is made and there is no existing profile, then a profile must be created. In addition, a reservation can also have a company, agent, or source profile or any combination of the three profiles attached to it.

After a reservation has been created, you can display, search, update or cancel a reservation. If a reservation has been cancelled, you can reactivate the reservation.

**How to open the New Reservation dialog box**

1. From the main Suite 7 screen, click the Reservations icon.

   ![Reservations toolbar](image)

   The Reservations toolbar appears to the right of the icons.

2. Click the New Reservation icon or press **CTRL + N**.

   ![New Reservation dialog box](image)

   The New Reservation dialog box appears.

   If the ForceSearchGuestHistory parameter is off, then the **New** button is available. Clicking **New** enables you to enter a reservation without checking if a guest profile exists.

   **Note:** The **LAST RES** button appears only if you have created at least one new reservation after logging in.

**Opening the New Reservation screen without searching for a guest profile**

**To open the new reservation screen without searching for a guest profile:**

1. From the New Reservation dialog box, enter the guest's name in the Name field.

2. Click **New**.

   The New Reservation screen appears with the guest name that has been typed in.
Searching for a guest profile

The hotel keeps track of repeat guests through the guest profiles (See Profiles). When making a reservation for a repeat guest, you do not have to fill in the profile information. You select the existing guest profile and make a new reservation for the guest. It is recommended to always check to make sure the guest is not a repeat customer before making the reservation. This will save you time in entering data and also help the hotel keep statistics on returning guests.

**How to search for a guest profile:**

1. From the New Reservation dialog box, type the guest's name or the first few letters of the guest's name, in the Name field.

2. Click SEARCH.
   - If no profile matches the search criteria entered, the New Reservation screen appears with the information that has been typed in.
   - If there are profiles that match the search criteria entered, the Existing Profiles dialog box appears with names that match the search criteria specified.
   - If the Existing Profiles dialog box appears, choose an appropriate option.

**Existing Profiles screen options**

<table>
<thead>
<tr>
<th>Click this button</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Profile</td>
<td>Create a profile and a reservation for a new guest.</td>
</tr>
<tr>
<td>New Resv.</td>
<td>Create a new reservation for the guest whose name is selected.</td>
</tr>
<tr>
<td>Profile</td>
<td>Display the profile of the guest whose name is selected.</td>
</tr>
<tr>
<td>Future</td>
<td>Display future reservations for the guest whose name is selected.</td>
</tr>
<tr>
<td>Search</td>
<td>Display the New Reservation dialog box.</td>
</tr>
</tbody>
</table>

Making a Reservation from the New Reservation screen

The screen on your system may look different because the screen and font styles are user definable. In the above example, the Main Reservation screen consists of the customer PROFILE and the actual RESERVATION. The Profile area contains information about the guest.

The Reservation area contains specific information about the current reservation. The mandatory fields are set in bold. The two tabs at the top indicate that this dialog box consists of Main and More Fields dialog boxes.

---

**Note:** To move from one field to the next, press the TAB key. To save the data currently in the dialog box, press the ENTER key.

**How to make a reservation from the New Reservation screen:**

1. In the New Reservation screen, type the information in the Profile area or click PROFILE to add more information about the guest.

2. Fill in the fields of the Reservation area of the New Reservation screen.

3. Click the MORE FIELDS tab.
The New Reservation More Fields screen appears.


5. Click OPTIONS to include additional details in the reservation.
   
   The Reservation Options dialog box appears.
   
   For a detailed explanation of options, see Reservations Options.

6. Click one or more options that you want to use with the current reservation.
   
   The dialog box of the selected option appears.

7. Complete the selected option's dialog box as required.

8. Repeat steps 6 and 7 for all options you need with the current reservation.

9. Click OK to save the reservation.
   
   The reservation and its related profile are saved.

   **Note:** If you try to save a reservation before entering all the mandatory fields, you are prompted with a message for the mandatory field that you have skipped. For example, if you have missed Source and try to save the new reservation, a Missing Source message dialog box appears.

10. Click OK.

11. Fill in the Source and any other missing mandatory fields before saving again.

12. After the new reservation is saved, a message dialog box appears displaying the reservation number.

13. Click OK.
   
   The New Reservation screen is closed.

**New Reservation screen: Profile area fields**

<table>
<thead>
<tr>
<th>Fill in this field</th>
<th>With this information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest Name</td>
<td>The guest's last name (Mandatory).</td>
</tr>
<tr>
<td>First Name</td>
<td>The guest's first name.</td>
</tr>
<tr>
<td>Language</td>
<td>The guest's language.</td>
</tr>
<tr>
<td>Title</td>
<td>The guest's title. The title changes according to the guest's language. For example, Dr., Professor, Monsieur, Senora.</td>
</tr>
<tr>
<td>Phone</td>
<td>The guest's telephone number.</td>
</tr>
<tr>
<td>Country</td>
<td>The country the guest comes from.</td>
</tr>
<tr>
<td>VIP</td>
<td>The VIP level of the guest. For example, a frequent guest.</td>
</tr>
<tr>
<td>Pref/Last</td>
<td>Guest's preferred room number or last room occupied.</td>
</tr>
<tr>
<td>Agent</td>
<td>The name of the travel agent who made the reservation.</td>
</tr>
<tr>
<td>Company</td>
<td>The name of the company who made the reservation.</td>
</tr>
<tr>
<td>Group</td>
<td>The name of the group the reservation was made for.</td>
</tr>
<tr>
<td>Source</td>
<td>The name of the reservation source who made the reservation. For example, a central reservation system.</td>
</tr>
</tbody>
</table>
### New Reservation screen: Reservation area fields

<table>
<thead>
<tr>
<th>Fill in this field</th>
<th>With this information</th>
<th>Mandatory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrival</td>
<td>The date of arrival.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Nights</td>
<td>The number of nights the reservation is for.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Departure</td>
<td>The date of departure.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Adults/Child</td>
<td>The number of adults and children in each room.</td>
<td></td>
</tr>
<tr>
<td># Rooms</td>
<td>The number of rooms reserved.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Rate Code</td>
<td>The rate code used to charge for the room. You can click the drop down arrow to display a grid with all available rates. If the reservation begins in one season and ends in another, a pop-up appears informing you that there is a season change during the stay, and the date of the change.</td>
<td></td>
</tr>
<tr>
<td>Fixed Rate</td>
<td>The fixed price for the room. You can mark the rate as fixed to enable manual changes to a rate without losing the rate code information. This field is used primarily with share reservations.</td>
<td></td>
</tr>
<tr>
<td>Rate</td>
<td>The room rate. The rate is normally linked to a rate code. When you select a rate code and a room type, this field is automatically filled in. You can also enter a rate by typing it manually.</td>
<td></td>
</tr>
<tr>
<td>Room Type</td>
<td>The category of room a guest has reserved.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Block</td>
<td>The group code. This code links a reservation to a group, and subtracts the room from the available group block. If the guest is not part of a group, this field remains empty.</td>
<td></td>
</tr>
<tr>
<td>Room</td>
<td>The room number.</td>
<td></td>
</tr>
<tr>
<td>C/I Time</td>
<td>The check-in time.</td>
<td></td>
</tr>
<tr>
<td>Reserv Type</td>
<td>The booking type; such as Guaranteed to Credit Card, Deposit received, 6 p.m. Type 0 indicates a guest who has checked-in guests.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Market</td>
<td>The market segment. If the hotel keeps statistics on reservation by market segment this field is displayed. Typical Market codes are Corporate, Individual, Leisure Group, as defined in the configuration.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Source</td>
<td>The source of business indicates how the reservation was made: For example, direct to the hotel by telephone, through Central Reservations, through a local company or agent, or a walk in.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Booked By</td>
<td>The name of the person who made contact with the hotel.</td>
<td></td>
</tr>
<tr>
<td>By</td>
<td>The type of contact. For example, by telephone, fax, or e-mail.</td>
<td></td>
</tr>
<tr>
<td>Fill in this field</td>
<td>With this information</td>
<td>Mandatory</td>
</tr>
<tr>
<td>--------------------</td>
<td>---------------------------------------------------------------------------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Payment</td>
<td>The method of payment. For example, cash, check, or credit card.</td>
<td></td>
</tr>
<tr>
<td>CC No.</td>
<td>The credit card number for payment.</td>
<td></td>
</tr>
<tr>
<td>Exp Date</td>
<td>The expiration date of the credit card.</td>
<td></td>
</tr>
<tr>
<td>Packages</td>
<td>Additional offers of services to a guest other than Room &amp; Taxes. For example Breakfast, Tennis, or parking. You can also prefix the code with a single digit (1-9) to indicate that the package code applies to a specific number of persons in the room. If packages are included in a rate code you can exclude them.</td>
<td></td>
</tr>
<tr>
<td>Special</td>
<td>Special requests or services to be supplied to the guests, such as daily newspaper, bathrobe, or amenities.</td>
<td></td>
</tr>
<tr>
<td>Discount</td>
<td>Discount on price, stated either as a sum or as a percentage of the room price. A discount cannot be given on a fixed rate.</td>
<td></td>
</tr>
<tr>
<td>Reason</td>
<td>The reason the discount was given.</td>
<td></td>
</tr>
<tr>
<td>No Post</td>
<td>Restricts posting of hotel outlets (interface) to guest's bill. This is normally used for cash-basis guests.</td>
<td></td>
</tr>
<tr>
<td>Print Rate</td>
<td>Indicates that the rate should be printed on the guest's bill. If the rate is paid by a travel agent, for example, and is not to be revealed to guest, then you will unmark this field so the rate will not be printed on guest's folio.</td>
<td></td>
</tr>
<tr>
<td>House Use</td>
<td>Indicates the reservation is for a hotel employee.</td>
<td></td>
</tr>
<tr>
<td>Comp</td>
<td>Complimentary room, which is a reservation with no room charge.</td>
<td></td>
</tr>
<tr>
<td>Appr. Code</td>
<td>Approval code of the credit card company.</td>
<td></td>
</tr>
<tr>
<td>Amount</td>
<td>Amount that received an approval and can be charged to guest's credit card.</td>
<td></td>
</tr>
<tr>
<td>C/O Time</td>
<td>The check-out time.</td>
<td></td>
</tr>
<tr>
<td>Flight #</td>
<td>The guest's flight number.</td>
<td></td>
</tr>
<tr>
<td>Made By</td>
<td>The hotel employee who entered the reservation and the date the reservation was entered into the system. It is automatically filled in by the system.</td>
<td></td>
</tr>
<tr>
<td>Conf.</td>
<td>The confirmation letter to be sent to the guest. (The letter must be defined in the text editor of the Setup Module). If you do not want to send a confirmation, leave this field blank.</td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>Front desk information. The notes about the reservation can be typed manually or filled in automatically by Suite 7, as in the case of a sharing reservation. The content of this field is also displayed on the top left of the billing screen.</td>
<td></td>
</tr>
</tbody>
</table>
**New Reservation screen: More Fields screen**

<table>
<thead>
<tr>
<th>Fill in this field</th>
<th>With this information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Out Message</td>
<td>Front desk message to the cashier about check-out, such as, &quot;Call the manager.&quot;</td>
</tr>
<tr>
<td>Deposit Requested</td>
<td>The deposit amount requested when the guest made the reservation.</td>
</tr>
<tr>
<td>By</td>
<td>The due date the deposit must be received by.</td>
</tr>
<tr>
<td>Deposit Paid</td>
<td>The amount of the deposit received. The amount is filled in automatically by Suite 7 once a deposit has been posted.</td>
</tr>
<tr>
<td>Received</td>
<td>The date the deposit was posted.</td>
</tr>
<tr>
<td>Colour Code</td>
<td>You can select a colour to be displayed on the Room Rack screen (CTRL + L) for each reservation. By doing this you can differentiate between reservations. For example, you can assign different colours to different VIP levels or groups.</td>
</tr>
<tr>
<td>Extra Bed</td>
<td>The number of extra beds required. This will influence the room rate if there is an extra charge for extra beds. The rate is updated automatically.</td>
</tr>
<tr>
<td>Crib</td>
<td>The number of cribs required. This will influence the room rate if there is an extra charge for cribs. The rate is updated automatically.</td>
</tr>
<tr>
<td>Interest</td>
<td>A guest's interests, for example, golf, theatre, or fine dining.</td>
</tr>
<tr>
<td>Package Costs</td>
<td>The total of the Packages in the New Reservation screen, to be deducted from the total rate to compute the net room rate.</td>
</tr>
<tr>
<td>Letter Printed</td>
<td>When the last letter concerning the reservation was printed.</td>
</tr>
<tr>
<td>Breakfast</td>
<td>Number of persons on breakfast only.</td>
</tr>
<tr>
<td>Halfboard</td>
<td>Number of persons on half board.</td>
</tr>
<tr>
<td>Fullboard</td>
<td>Number of persons on full board.</td>
</tr>
<tr>
<td>CRS Reservation #</td>
<td>If the reservation was made through a Central Reservations System, the number will be recorded here.</td>
</tr>
<tr>
<td>Balance Link</td>
<td>Displays the profile number of the guest who will be paying for the bill. The purpose of this field is to enable correct calculation of the credit report.</td>
</tr>
<tr>
<td>Card Type</td>
<td>Guest loyalty card type.</td>
</tr>
<tr>
<td>Card No.</td>
<td>Card number of guest loyalty card.</td>
</tr>
<tr>
<td>Exp Date</td>
<td>Expire date of guest loyalty card.</td>
</tr>
<tr>
<td>Folio Curr</td>
<td>The currency the guest's folio will be printed in.</td>
</tr>
<tr>
<td>Remarks</td>
<td>General information about a guest. Room move information is also recorded here.</td>
</tr>
<tr>
<td>Breakfast</td>
<td>Number of persons on breakfast only</td>
</tr>
<tr>
<td>Halfboard</td>
<td>Number of persons on half board</td>
</tr>
<tr>
<td>Fullboard</td>
<td>Number of persons on full board</td>
</tr>
</tbody>
</table>
### Making a Company Reservation

A company can make a reservation for a guest.

**To make a company reservation:**

1. From the New Reservation dialog box, enter the guest's name or the first few letters of the guest's name, in the **NAME** field.
2. Type the company name or the first few letters of the company name, in the **Company** field or type the company number in the **Company #** field.
   - If you typed in the company number, the appropriate company name appears in the **Company** field.
3. **Press TAB or click SEARCH.**
   - If no company profile matches the search criteria entered, the Profile dialog box appears with the company name filled in. To create a new profile for the company, see Profiles.
   - If there are company profiles that match the search criteria entered, the Existing Profiles dialog box appears with company names that match the search criteria specified.
4. From the Existing Profiles dialog box, select the company name.
5. Click **OK.**
   - The New Reservation dialog box appears with the guest name and company name filled in.
6. From the New Reservation dialog box, **click SEARCH.**
   - The Existing Profiles dialog box appears.
7. From the Existing Profiles dialog box, select the guest name.
8. **Click NEW RESV.**
   - The New Reservation screen appears with the guest profile and the company name filled in.
9. **Complete the New Reservation screen as in the previous section.**

### Making an Agent Reservation

An agent can make a reservation for a guest.

**To make an agent reservation:**

1. From the New Reservation dialog box, enter the guest's name or the first few letters of the guest's name, in the **NAME** field.
2. Type the agent name or the first few letters of the agent name, in the **Agent** field or type the agent number in the **Agent #** field.
   - If you typed in the Agent number, the appropriate company name appears in the Agent field.

### Fill in this field  With this information

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Card Type</td>
<td>Guest loyalty card type</td>
</tr>
<tr>
<td>Card No.</td>
<td>Card number of guest loyalty card</td>
</tr>
<tr>
<td>Exp Date</td>
<td>Expire date of guest loyalty card</td>
</tr>
</tbody>
</table>

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3. Press TAB or click SEARCH.
   If no agent profile matches the search criteria entered, the Profile dialog box appears with the agent name filled in. To create a new profile for the agent, see Profiles.
   If there are agent profiles that match the search criteria entered, the Existing Profiles dialog box appears with agent names that match the search criteria specified.
4. From the Existing Profiles dialog box, select the agent name.
5. Click OK.
   The New Reservation dialog box appears with the guest name and agent name filled in.
6. From the New Reservation dialog box, click SEARCH.
   The Existing Profiles dialog box appears.
7. From the Existing Profiles dialog box, select the guest name.
8. Click NEW RESV.
   The New Reservation screen appears with the guest profile and the agent name filled in.
9. Complete the New Reservation screen as in the previous section.

Making a Source Reservation
A source can make a reservation for a guest.

To make a source reservation:
1. From the New Reservation dialog box, enter the guest's name or the first few letters of the guest's name, in the NAME field.
2. Type the source name or the first few letters of the agent name, in the SOURCE field.
3. Press TAB or click SEARCH.
   If no source profile matches the search criteria entered, the Profile dialog box appears with the source name filled in. To create a new profile for the source, see Profiles.
   If there are source profiles that match the search criteria entered, the Existing Profiles dialog box appears with source names that match the search criteria specified.
4. From the Existing Profiles dialog box, select the source name.
5. Click OK.
   The New Reservation dialog box appears with the guest name and source name filled in.
6. From the New Reservation dialog box, click SEARCH.
   The Existing Profiles dialog box appears.
7. From the Existing Profiles dialog box, select the guest name.
8. Click NEW RESV.
   The New Reservation screen appears with the guest profile and the source name filled in.
9. Complete the New Reservation screen as in the previous section.

**Displaying the last reservation made**

**To display the last reservation made:**

1. From the Reservations toolbar, click the New Reservation icon, or press CTRL + N.
   The New Reservation dialog box appears.
2. Click LAST RES.
   The completed Reservation screen of the last reservation made appears.

**Updating Reservations**

You can make and save changes to existing reservations.

**To locate existing reservations you can perform the following searches:**

- A standard search that is used to display a list of reservations that match the criteria entered.
- An advanced search that is used to narrow the search and to specify more precisely the reservations to be displayed.

**Searching for a reservation using the standard search**

**To search for a reservation using the standard search:**

1. From the main Suite 7 screen speed bar, click the RESERVATIONS icon.
   The Reservations toolbar appears to the right of the icons.
2. Click the Update Reservations icon, or press CTRL + U.
   The Reservation Search dialog box appears.
3. Fill in any of the fields in the Reservation Search dialog box, and click SEARCH.

You may fill in multiple fields to narrow the search criteria. If no data is entered, the list of reservations displayed is in alphabetical order by date of reservation.

A list of reservations that match what you have specified is displayed. The grids are user definable, so the grid on your screen may appear different than the grid displayed. For example, if you specify a search for the First Name “Thomas”, the Reservations List grid appears with a list of all reservations for people who have the first name Thomas.

**Reservation Search dialog box**

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation of the field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The guest's last name.</td>
</tr>
<tr>
<td>First Name</td>
<td>The guest's first name.</td>
</tr>
<tr>
<td>Company</td>
<td>The name of the company who made the reservation.</td>
</tr>
<tr>
<td>Agent</td>
<td>The name of the travel agent who made the reservation.</td>
</tr>
<tr>
<td>Group</td>
<td>The name of the group the reservation was made for</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation of the field</td>
</tr>
<tr>
<td>---------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Block</td>
<td>The group code.</td>
</tr>
<tr>
<td>Party</td>
<td>The name of the party that the guest is travelling with.</td>
</tr>
<tr>
<td>Rserv Type</td>
<td>The status of the reservation.</td>
</tr>
<tr>
<td>Conf #</td>
<td>The confirmation number.</td>
</tr>
<tr>
<td>Arrival ---To ---</td>
<td>A range of arrival dates.</td>
</tr>
<tr>
<td>Departure ---To ---</td>
<td>A range of departure dates.</td>
</tr>
</tbody>
</table>

**Reservations List grid options**

<table>
<thead>
<tr>
<th>Clicking this option</th>
<th>Does this</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Displays the New Reservation dialog box.</td>
</tr>
<tr>
<td>Check-In</td>
<td>Checks in a guest and changes the guest’s status from Expected to Checked-In. After Check-In, this button toggles to BILLING. See BILLING below.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Cancels a reservation. After cancellation this button toggles to REACTIVATE. See REACTIVATE below. In addition, on the day the guest checks in, the CANCEL button toggles to CANCEL C.I. (Cancel Check-In). See CANCEL C.I. below.</td>
</tr>
<tr>
<td>Profile</td>
<td>Displays the Profile screen for the selected reservation.</td>
</tr>
<tr>
<td>Options</td>
<td>Displays the Reservation Options without displaying the Reservations screen.</td>
</tr>
<tr>
<td>Edit</td>
<td>Displays the Reservation screen for the selected reservation,</td>
</tr>
<tr>
<td>Search</td>
<td>Displays the Reservation Search dialog box.</td>
</tr>
<tr>
<td>Reactivate</td>
<td>Reactivates a cancelled reservation. This button toggles depending on the reservation status to CANCEL CI or CANCEL.</td>
</tr>
<tr>
<td>Billing</td>
<td>If you have the appropriate rights, displays the guest’s bill in Cashiering. This option is activated after the guest has check-in.</td>
</tr>
<tr>
<td>Cancel C.I.</td>
<td>Cancels the check-in of a guest whom checked-in today. The reservation status reverts to Expected.</td>
</tr>
</tbody>
</table>

**Searching for a reservation using the advanced search option**

**To search for a reservation using the advanced search option:**

1. From the main Suite 7 screen speed bar, click the RESERVATIONS icon. The Reservations toolbar appears to the right of the icons.
2. Click the Update Reservations icon, or press CTRL + U.
3. The Reservation Search dialog box appears.
4. Click ADVANCE.
The Reservations Search dialog box expands.

4. Enter one or more search criteria and click SEARCH.

The Reservation List grid appears.

**Note:** If no reservations match the search criteria, Suite 7 notifies you that no reservations were found.

**Advanced Reservation Search dialog box fields**

<table>
<thead>
<tr>
<th>This field</th>
<th>Is to search for</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>All reservations' statuses: Expected, Checked-in, Cancelled, and No Show.</td>
</tr>
<tr>
<td>Cancellation</td>
<td>Reservations that have been cancelled.</td>
</tr>
<tr>
<td>Day Use</td>
<td>Reservations that their arrival date is same as their departure date.</td>
</tr>
<tr>
<td>Complementary</td>
<td>Reservations that are marked as Comp in the reservation dialog box</td>
</tr>
<tr>
<td>No Show</td>
<td>Guests that did not arrive at the hotel on their arrival date.</td>
</tr>
<tr>
<td></td>
<td>The no-show reservations are deleted the day after the original expected departure date.</td>
</tr>
<tr>
<td>Departure</td>
<td>Guests who are due to depart today</td>
</tr>
<tr>
<td>City</td>
<td>Reservations for guests from a specific city.</td>
</tr>
<tr>
<td>Country</td>
<td>Reservations for guests from a specific country.</td>
</tr>
<tr>
<td>Room Type</td>
<td>All reservations with the specified room type.</td>
</tr>
<tr>
<td>Room No.</td>
<td>All reservations blocked with the specified room number.</td>
</tr>
<tr>
<td>Market Code</td>
<td>Reservations with the specified market code.</td>
</tr>
<tr>
<td>Colour Code</td>
<td>Reservations with the specified colour code.</td>
</tr>
<tr>
<td>Source</td>
<td>Reservations booked through the specified source.</td>
</tr>
<tr>
<td>Source Code</td>
<td>Reservations with the specified source code.</td>
</tr>
<tr>
<td>Cancel No</td>
<td>Reservations with the specified cancellation number.</td>
</tr>
<tr>
<td>VIP Code</td>
<td>Reservations with the specified VIP code.</td>
</tr>
<tr>
<td>Member No.</td>
<td>Reservations with the specified member number.</td>
</tr>
<tr>
<td>Guest Card No</td>
<td>Reservations with the specified guest card number.</td>
</tr>
<tr>
<td>Rate Code</td>
<td>Reservations with the specified rate code.</td>
</tr>
<tr>
<td>Price--- To---</td>
<td>Reservations within the price range. If the To field is left blank, the search will be for prices above that stated.</td>
</tr>
<tr>
<td>Deposit Date</td>
<td>Reservations that require a deposit by the date entered.</td>
</tr>
<tr>
<td>Deposit Amnt.---</td>
<td>Reservations with deposits in the given range. If the To field is left blank, the search will be for deposits above that stated.</td>
</tr>
<tr>
<td>To---</td>
<td></td>
</tr>
<tr>
<td>Conf. Letter #</td>
<td>Reservations with the specified confirmation number.</td>
</tr>
<tr>
<td>Arrival Time---</td>
<td>Reservations with expected arrivals in the stated time frame.</td>
</tr>
<tr>
<td>To---</td>
<td>Reservations with expected arrival times after the stated time.</td>
</tr>
</tbody>
</table>
This field | Is to search for
---|---
CRS No. | Reservations with the specified central reservations number.
Created On---By--- | Reservations made on the specified date, by the specified hotel employee. Either one or both fields can be specified.
Stay On | Reservations that will be in-house on the stay on date specified. This includes reservations for the future and reservations which have already checked-in.
Mass Cancellation | If the check box is checked then all reservations that can be cancelled will be displayed and an addition button Mass Cancellation will be available on the Reservation List grid. Upon selecting the Mass Cancellation button you will be warned that you are about to cancel all reservations for the specified date and reminded to enter a specific reservation type to be cancelled.
Partial String Match | If the check box is checked then you may enter part (some of the letters) of the field and search. The results will include all the reservations that contain this combination of letters in the field. For example, if "ti" is typed in the Name field, the results of the search will include Paretti, Martin, and Timona.
Partial Condition Match (OR) | If the check box is checked and more than one field is entered, the results of the search may include one or more of the search criteria. For example, "Smith" is typed in the Name field and "Chicago" is typed into the City field. If a reservation "Smith" is found in the city of Miami, or a reservation "Jones" is found in the city of "Chicago", then both of these reservations appear on the Reservation List grid. If this check box is not checked, only reservations that meet all the criteria entered will be on the list.

Checking in a guest from the Reservation List grid

To check in a guest from the Reservation List grid:

1. Locate the reservation (see Searching for a reservation using the standard search or Searching for a reservation using the advanced search option).
2. From the Reservations List grid, select the guest.
3. Click CHECK-IN.
   
   If the room number has not been assigned, a Room Block prompt appears with the default room number. The default room number is the first available room number of the selected room type.
4. Accept the default room number or choose one from the drop-down menu.
5. Click OK.
   
   If you did not select a method of payment in the Reservation screen, the Payment Method dialog box appears.
6. Complete the Payment Method dialog box, and click OK.
   
   A message that the check-in was successful appears.
Cancelling an Expected reservation from the Reservation List grid

You can cancel an Expected reservation if the guest has not made a deposit on the reservation.

**Note:** If the guest has made a deposit, you cannot cancel the reservation with this option. It must be cancelled through the Cashiering program (see the [Suite 7 Cashiering Manual](#)).

How to cancel an Expected reservation from the Reservation List grid:

1. Locate the reservation.
2. From the Reservations List grid, select the guest.
3. Click CANCEL.
   
The Cancel reservation dialog box appears.
4. From the Cancel reservation dialog box, click the drop down arrow and select a reason from the Reasons list.
5. Click YES.
   
The reservation is cancelled. The status on the Reservation List grid is changed from Expected to Cancelled and the CANCEL button is toggled to REACTIVATE.

Cancelling a Checked-In reservation from the Reservation List grid

You can cancel a Checked-In reservation if the guest does not have a balance.

**Note:** If the guest has a balance, you cannot cancel the reservation with this option.

How to cancel a checked-in reservation from the Reservation List grid:

1. Locate the reservation.
2. From the Reservations List grid, select the guest.
3. Click CANCEL C.I.
   
   A confirmation message appears.
4. Click YES.
   
   A message to change the room status appears.
5. Check the check box to change the room status to Touch Up and click YES or to change the room status to Dirty, click YES, or to leave the room status as is, click No.
   
The check-in is cancelled. The status on the Reservation List grid is changed from Checked-In to Expected. The CANCEL C.I. button is toggled to CANCEL and the BILLING button is toggled to CHECK-IN.

Reinstating a checked-out reservation from the Reservation List grid

If a guest has checked out the reinstate option enables you to check the guest back into the room. The option is active only if the guest has checked out.
How to reinstate a checked-out reservation from the Reservation List grid:
1. Locate the checked-out reservation.
2. From the Reservations List grid, select the guest.
3. Click ReINSTATE.
   A warning appears.
4. Click ORIGINAL ROOM or PX ROOM.
   The reservation status is changed from Checked Out to Due Out. The REACTIVATE button is toggled to CANCEL C.I.

Reactivating a cancelled reservation from the Reservation List grid
You can reactivate a cancelled reservation.

   Note: A message may appear notifying you that the reservation cannot be reactivated. There are various reasons why a reservation cannot be reactivated. For example, the rate code is not available or there is not room left in the block. If you have system rights, you may be able to override the message and reactivate the reservation.

How to reactivate a cancelled reservation from the Reservation List grid:
1. Locate the reservation.
2. From the Reservations List grid, select the guest.
3. Click REACTIVATE.
   A confirmation message appears.
4. Click Yes.
   The Reservation screen for the reactivated reservation appears. You can make changes to the reservation.
5. From the Reservation screen, click OK.
   The Reservation screen is closed. The Reservation List grid appears with the reservation reactivated. The reservation status is changed from Cancelled to Expected. The Check-In button is activated and the Reactivate button is toggled to Cancel.
Reservations Options

Various options can be attached to a reservation through the Reservation Options dialog box. For example, a confirmation letter, fixed charges, a message, or a deposit. Changes to the reservation can also be made.

For example, authorizing direct billing, adding routing instructions, or splitting a party reservation.

Opening the Reservation Options dialog box

The Reservation Options can be opened from the following:

- Reservation Search dialog box
- Reservation screen

Opening the Reservation Options from the Reservation Search dialog box

To open the Reservation Options from the Reservation Search dialog box:

1. From the main Suite 7 screen speed bar, click the RESERVATIONS icon.
   The Reservations toolbar appears to the right of the icons.

2. Click the Update Reservations icon, or press CTRL + U.
   The Reservation Search dialog box appears.

3. Fill in any of the fields in the Reservation Search dialog box, and click SEARCH.
   You may fill in multiple fields to narrow the search criteria. If no data is entered, the list of reservations displayed is in alphabetical order by date of reservation.

4. Select the reservation that you want to view or edit.

5. Click OPTIONS.
   The Reservation Options appear.

**Note:** When a button is greyed out, the option is not activated for the guest selected or you do not have rights to use this option.
**Reservation Search dialog box**

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation of the field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The guest's last name.</td>
</tr>
<tr>
<td>First Name</td>
<td>The guest's first name.</td>
</tr>
<tr>
<td>Company</td>
<td>The name of the company who made the reservation.</td>
</tr>
<tr>
<td>Agent</td>
<td>The name of the travel agent who made the reservation.</td>
</tr>
<tr>
<td>Group</td>
<td>The name of the group the reservation was made for</td>
</tr>
<tr>
<td>Block</td>
<td>The group code.</td>
</tr>
<tr>
<td>Party</td>
<td>The name of the party that the guest is travelling with.</td>
</tr>
<tr>
<td>Resrv Type</td>
<td>The status of the reservation.</td>
</tr>
<tr>
<td>Conf #</td>
<td>The confirmation number.</td>
</tr>
<tr>
<td>Arrival</td>
<td>A range of arrival dates.</td>
</tr>
<tr>
<td>Departure</td>
<td>A range of departure dates.</td>
</tr>
</tbody>
</table>

**Reservations List grid options**

<table>
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<tr>
<th>Clicking this option</th>
<th>Does this</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Displays the New Reservation dialog box.</td>
</tr>
<tr>
<td>Check-In</td>
<td>Checks in a guest and changes the guest’s status from Expected to Checked-In. After Check-In, this button toggles to BILLING. See BILLING below.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Cancels a reservation. After cancellation this button toggles to REACTIVATE. See REACTIVATE below. In addition, on the day the guest checks in, the CANCEL button toggles to CANCEL C.I. (Cancel Check-In). See CANCEL C.I. below.</td>
</tr>
<tr>
<td>Profile</td>
<td>Displays the Profile screen for the selected reservation.</td>
</tr>
<tr>
<td>Options</td>
<td>Displays the Reservation Options without displaying the Reservations screen.</td>
</tr>
<tr>
<td>Edit</td>
<td>Displays the Reservation screen for the selected reservation,</td>
</tr>
<tr>
<td>Search</td>
<td>Displays the Reservation Search dialog box.</td>
</tr>
<tr>
<td>Reactivate</td>
<td>Reactivates a cancelled reservation. This button toggles depending on the reservation status to CANCEL C.I or CANCEL.</td>
</tr>
<tr>
<td>Billing</td>
<td>If you have the appropriate rights, displays the guest’s bill in Cashiering. This option is activated after the guest has check-in.</td>
</tr>
<tr>
<td>Cancel C.I.</td>
<td>Cancels the check-in of a guest whom checked-in today. The reservation status reverts to Expected.</td>
</tr>
<tr>
<td>Click this button</td>
<td>To do this</td>
</tr>
<tr>
<td>------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Routing</td>
<td>Direct charges of specific department codes to post automatically to different folios.</td>
</tr>
<tr>
<td>Auth. Direct Bill</td>
<td>Authorize direct billing for guests who are not paying for their own stay, but who are having their payment made by someone else, such as, a company or organization.</td>
</tr>
<tr>
<td>Traces</td>
<td>Communicate guest's requests with other hotel staff. It allows the hotel to keep track of things that have to be done for guests on a specific date.</td>
</tr>
<tr>
<td>Reg. Card</td>
<td>Print a registration card for the current reservation.</td>
</tr>
<tr>
<td>Room Move</td>
<td>Move an in-house guest to another room.</td>
</tr>
<tr>
<td>Reinstate</td>
<td>If a guest has checked out, you can check the guest back into the room.</td>
</tr>
<tr>
<td>Package Options</td>
<td>Display a list of package elements for which an allowance has been created.</td>
</tr>
<tr>
<td>Credit Cards</td>
<td>Get additional or manual approval of the guest's credit card.</td>
</tr>
<tr>
<td>Confirmation</td>
<td>View, print, or e-mail a confirmation letter.</td>
</tr>
<tr>
<td>Waitlist</td>
<td>Move a guest reservation to the Waitlist.</td>
</tr>
<tr>
<td>Fixed Charges</td>
<td>Post specific charges on a daily basis.</td>
</tr>
<tr>
<td>Virtual Numbers</td>
<td>If your system is configured for DID (Direct Inward Dialling), you can assign a specific telephone or fax number to a guest reservation for the duration of the guest's stay.</td>
</tr>
<tr>
<td>Accompanying</td>
<td>Register each guest in the room, even if there is only one actual reservation for that room.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete a reservation.</td>
</tr>
<tr>
<td>Regrets</td>
<td>Move a guest reservation to the Regrets list.</td>
</tr>
<tr>
<td>Rate Info</td>
<td>View a room rate in various currencies.</td>
</tr>
<tr>
<td>Changes</td>
<td>View all the changes made to a reservation since the original reservation was made.</td>
</tr>
<tr>
<td>Messages</td>
<td>View, create, edit or delete guest messages.</td>
</tr>
<tr>
<td>Add On</td>
<td>Make a copy of the current reservation with a different reservation number.</td>
</tr>
<tr>
<td>Locator</td>
<td>Enter a guest locator.</td>
</tr>
<tr>
<td>Pre-Billing/Billing</td>
<td>Open the Billing screen in the Cashiering module and post a deposit payment or a pre-billing charge before the guest checks in. Changes to Billing button for a checked in guest.</td>
</tr>
<tr>
<td>Shares</td>
<td>Combine two (or more) reservations to share the same room or to break an existing share reservation.</td>
</tr>
<tr>
<td>History</td>
<td>View the details of previous stays.</td>
</tr>
<tr>
<td>Party</td>
<td>Split a party reservation.</td>
</tr>
<tr>
<td>Meal Plan</td>
<td>Set the meal plan schedule for a guest.</td>
</tr>
</tbody>
</table>
Click this button | To do this
--- | ---
Leisure | Leisure activities are bookings for hotel outlets such as restaurants, spa, golf tee time, hairdresser or any other leisure activity or service.
Guest Awards | Assign and view Guest awards and award an award when the number of points has been reached.
Q Rooms | Place a reservation on the queue to inform Housekeeping that a guest has arrived and his room is not yet ready.
Proforma | Produce an invoice that calculates the nights for an expected guest and checked-in guest.

Advanced Reservation Search Dialog Box Fields

| This field | Is to search for |
--- | ---
General | All reservations' statuses: Expected, Checked-in, Cancelled, and No Show.
Cancellation | Reservations that have been cancelled.
Day Use | Reservations that their arrival date is same as their departure date.
Complementary | Reservations that are marked as Comp in the reservation dialog box.
No Show | Guests that did not arrive at the hotel on their arrival date. The no-show reservations are deleted the day after the original expected departure date.
Departure | Guests who are due to depart today
City | Reservations for guests from a specific city.
Country | Reservations for guests from a specific country.
Room Type | All reservations with the specified room type.
Room No. | All reservations blocked with the specified room number.
Market Code | Reservations with the specified market code.
Colour Code | Reservations with the specified colour code.
Source | Reservations booked through the specified source.
Source Code | Reservations with the specified source code.
Cancel No | Reservations with the specified cancellation number.
VIP Code | Reservations with the specified VIP code.
Member No. | Reservations with the specified member number.
Guest Card No | Reservations with the specified guest card number.
Rate Code | Reservations with the specified rate code.
Price--- To--- | Reservations within the price range. If the To field is left blank, the search will be for prices above that stated.
Deposit Date | Reservations that require a deposit by the date entered.
## This field | Is to search for
---|---
Deposit Amnt.--- To--- | Reservations with deposits in the given range. If the To field is left blank, the search will be for deposits above that stated.
Conf. Letter # | Reservations with the specified confirmation number.
Arrival Time--- To--- | Reservations with expected arrivals in the stated time frame. If the To field is left blank, the search will be for arrival times after the stated time.
CRS No. | Reservations with the specified central reservations number.
Created On--- By--- | Reservations made on the specified date, by the specified hotel employee. Either one or both fields can be specified.
Stay On | Reservations that will be in-house on the stay on date specified. This includes reservations for the future and reservations which have already checked-in.
Mass Cancellation | If the check box is checked then all reservations that can be cancelled will be displayed and an addition button Mass Cancellation will be available on the Reservation List grid. Upon selecting the Mass Cancellation button you will be warned that you are about to cancel all reservations for the specified date and reminded to enter a specific reservation type to be cancelled.
Partial String Match | If the check box is checked then you may enter part (some of the letters) of the field and search. The results will include all the reservations that contain this combination of letters in the field. For example, if "ti" is typed in the Name field, the results of the search will include Paretti, Martin, and Timona.
Partial Condition Match (OR) | If the check box is checked and more than one field is entered, the results of the search may include one or more of the search criteria. For example, "Smith" is typed in the Name field and "Chicago" is typed into the City field. If a reservation "Smith" is found in the city of Miami, or a reservation "Jones" is found in the city of "Chicago", then both of these reservations appear on the Reservation List grid. If this check box is not checked, only reservations that meet all the criteria entered will be on the list.

### Displaying the Reservation Options from the Reservation screen

**To display the Reservation Options from the Reservation screen:**

If you are already working in the Reservation screen, simply click OPTIONS. The Reservation Options dialog box appears.

**Note:** When a button is greyed out, the option is not activated for the guest selected or you do not have rights to use this option.
Routing

The Routing option allows you to direct charges of specific department codes to post automatically to different folios (up to 98 folios). You can route charges to the same room, to another name, or to other guests' folio. You can also define a routing period to restrict the routing of postings to certain dates. In addition, you can also set a different method of payment for each routing instruction. When changing the departure date on a reservation with routing instructions, you will be asked whether to update the dates on routing instructions.

**How to route charges:**

1. From the Reservations Options dialog box, click **ROUTING**.
   The Routing Charge screen appears.

2. Click **NEW**.
   The New Routing Charge dialog box appears.

3. Type the folio number to which you wish to route the charge, in the Window field.

4. Fill in the dates for the routing period.

5. Click the drop down arrow in the Departments column.
   The Select Departments dialog box appears.

6. From the Select Dialog box, click **INCLUDE** to include the departments you want to route charges for, or click **EXCLUDE** to exclude the departments from being routed.
   If you want to include all except one or two codes, select and INCLUDE "All Department Codes". Then select and EXCLUDE the code that you want to exclude. For instance, if you include all department codes, and exclude only No Show (110), it will appear in the field as "*,-110".

7. Click **OK**.
   The Select Dialog box is closed and the abbreviations or numerical codes for the selected departments (as defined in the hotel configuration) appear on the Routing Charge dialog box.

8. If you want the guest to be able to view and/or check out the routed charges in this window on their television, check the appropriate checkbox:
   - **BILL VIEW**: View the charges in this window on the television.
   - **VIDEO CHECKOUT**: Checkout the charges in this window via the television.

9. From the New Routing Charge dialog box, select **SAME ROOM**, **NAME**, **OTHER ROOM**, or **OTHER NAME**, depending on whether you want the charges to be routed to the same room, but to an Agent, Company, Group, or Source linked to the reservation, or to another room or reservation, or another profile name.
   a. To route the charges to an Agent, Company, Group, or Source linked to the reservation, check the **SAME ROOM** check box, and select the desired name from the **NAME** drop-down listing.

**Note:** To route postings of an individual reservation to a company, a travel agent, or a source, you should link the reservation first via the Agent, Company, or Source fields in the Profile.
b. Uncheck the SAME ROOM checkbox, select OTHER ROOM to route the charges to another guest's room. If you know the room number, just type it in the field. Clicking the field will prompt you with a list of all expected and in-house reservations. You can search for the reservation either by room number if assigned to guest, or by guest's name.

**Note:** If you select a reservation that has no overlapping date with the current reservation, the system issues a warning.

c. Uncheck the SAME ROOM checkbox, click OTHER NAME to route the charges to another name. This routes the charges to a specific profile name and not to a specific room or reservation.

10. Highlight the name or the room that you want to route the charges to and press TAB.

The Address Detail field is filled in with the address details of the name selected.

11. Click the Payment field to select the payment method for this window.

If none is selected, the payment method defaults to the type chosen in the guest's reservation.

12. Click OK.

You are returned to the Routing Charges dialog box.

If the payment method is NOT a credit card routing is complete and the new routing instruction appears on the Routing Charge screen with the room number and other information for the guest to whom the charges are being routed. Simply close the Routing Charge screen. (See step 13.)

If the payment method is a credit card, continue with the next step.

Type in the credit card number and expiration date, and the name of the cardholder as it appears on the credit card. The Authorization buttons are now activated.

If you wish to authorize an amount, click the appropriate authorization button:

- Manual Authorization: Opens a dialog box that lets you enter the approved amount and the approval code.
- Additional Authorization: Opens a dialog box that lets you enter an additional amount and contacts the credit card company to get the required authorization when you click OK.

The New Routing Charge dialog box is closed. The new routing instruction appears on the Routing Charge screen box with the room number and other information for the guest to whom the charges are being routed.

13. Click Close.

The Routing Charge screen box is closed.
Routing Charge screen options

<table>
<thead>
<tr>
<th>Click this button</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>From</td>
<td>View if the guest has routing instructions from other guest or room number. Inactive until the guest checks in.</td>
</tr>
<tr>
<td>New</td>
<td>Add a new routing instruction.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete the routing instruction the cursor is currently on.</td>
</tr>
<tr>
<td>Edit</td>
<td>Change routing instructions.</td>
</tr>
<tr>
<td>Credit Card details</td>
<td>Opens the Credit Card Details dialog box for the selected billing window (routing instruction). Active only if the payment method for the highlighted routing instruction is a credit card.</td>
</tr>
</tbody>
</table>

Reinstate

If a guest has checked out the reinstate option allows you to check the guest back into the room. This option is active only if the guest has checked out.

To reinstate a checked-out reservation:
1. From the Reservation Options dialog box, click REINSTATE.
   A warning appears.
2. Click ORIGINAL ROOM or PX ROOM.
   The reservation status is changed from Checked Out to Due Out.

Fixed Charges

The option Fixed Charges allows you to post specific charges on a daily basis. You can also edit or delete a fixed charge. Suite 7 will post the fixed charges automatically during the night audit and when you print advance folio.

How to enter a new fixed charge:
1. From the Reservation Options dialog box, click FIXED CHARGES.
   The Fixed Charges screen appears with the name and dates of the reservation.
2. Click New.
   The Edit Fixed Charges dialog box appears.
3. Click the Department drop down arrow and choose the department you want to set a fixed charge for.
4. Type the quantity and price in the appropriate fields.
   If the system is setup for Dual or Euro, select the currency to be posted.
   **Note:** Some departments may include the price when you select the item. In those instances the price will be filled in automatically once that department was selected.
5. If required, select an arrangement code to include the selected department under specific arrangement group when you print the folio.
6. Click OK.
The Edit Fixed Charges dialog box is closed. The Fixed Charges screen appears displaying the department, quantity, and price appear in the dialog box and the total fixed charges price appears as Total fixed charge.

7. Repeat steps 2-6 for every additional department you want fixed charges for.
   The Total fixed charges increments by each additional price.

8. Click CLOSE.
   The Fixed Charges screen is closed.

**How to edit a fixed charge:**

1. From the Reservation Options dialog box, click FIXED CHARGES.
   The Fixed Charges screen appears.
2. Select the Fixed Charge that you want to edit.
3. Click EDIT.
   The Edit Fixed Charges dialog box appears.
4. Enter any changes you want to make.

   **Note:** Some departments may include the price when you select the item. In those instances the price will be filled in automatically once that department was selected.

5. Click OK.
   The Edit Fixed Charges dialog box is closed. The Fixed Charges screen appears displaying the department, quantity, and price appear in the dialog box and the total fixed charges price appears as Total fixed charge.

6. Click CLOSE.
   The Fixed Charges screen is closed.

**How to delete a fixed charge:**

1. From the Reservation Options dialog box, click FIXED CHARGES.
   The Fixed Charges screen appears.
2. Select the fixed charge that you want to delete.
3. Click DELETE.
   A confirmation message appears.
4. Click YES.
   The fixed charge is deleted.
5. Click CLOSE.
   The Fixed Charges screen is closed.
Rate Info

Viewing a room rate in various currencies
This option enables you to view a room rate in various currencies.

To view a room rate in various currencies:
From the Reservation Options dialog box, click RATE INFO.
The Currency dialog box appears.
The left column shows currency names, where the first line shows the base currency. The right column shows the exchange rates with the base currency.

Viewing rate details in a specific currency
To view rate details in a specific currency:
1. From the Reservation Options dialog box, click RATE INFO.
   The Currency dialog box appears.
2. Highlight the currency required.
3. Click DETAILS.
   The Rate Info dialog box appears.
4. If you want to print, click PRINT.
5. Click CLOSE.
   The Rate Info dialog box is closed and the Currency dialog box appears.
6. From the Currency dialog box, click CLOSE.
   The Currency dialog box is closed.

Billing
The Billing option will open the Billing screen in the Cashiering Module.
Here you can view guest's folios post charges, and use other related functions.
Remember that the billing option is only available for checked-in guests.

How to open the Billing screen:
1. From the Reservations Option dialog box, click BILLING.
   The Cashier Login screen appears.
2. Type your cashier number in the Cashier No field.
3. Type your password in the Password field.
4. Click LOGIN.
   The Billing screen appears.

Note: For instructions on Billing see the Suite 7 Cashiering Manual.
Pre-Billing

Posting deposit payments

This option allows you to post a deposit payment before the guest checks in. Some hotel policies require a deposit in order to guarantee a reservation.

Remember that the pre-billing option is only available for a guest who has not yet checked in. When the guest checks in, this option becomes "Billing".

Note: If a deposit has been made on an expected reservation you are not able to cancel the reservation from the reservations module.

How to post a deposit payment:

1. From the Reservation Options, click PRE-BILLING.

   The Cashier Login screen with your cashier number appears.

   Note: Performing any operation related to the cashier's work requires a user password.

2. Type in your password, and click LOGIN.

   The Pre-Billing dialog box appears. If a deposit amount has already been paid, it will be displayed.

3. Click DEPOSITS.

   The Deposit Payments dialog box appears.

4. In the Payment Department field, click on the down arrow to open the drop-down list, and select the payment method.

5. Type in the Amount of the deposit.

6. To change the Reservation Type, click the down-arrow and select the new Reservation Type.

7. In the Window Number field, choose the number of the window where you want the deposit to appear once the guest checks in.

8. If you want to print a receipt for the deposit, check the Print Receipt checkbox at the bottom of the dialog box.

9. If the deposit is paid by a travel agent whose commission is pre-paid, either type in the percentage for the Pre-Paid Commission, or type the amount in directly.

   Suite 7 calculates the Total Amount, which is the sum of the deposit and the commission.

10. In the Supplementary Info field, you can enter the guest name and the confirmation number of the reservation.

    If you have selected a credit card as the payment method, the Supplementary Info field type becomes the Credit Card Number field. Type in the credit card number. (If the card number is recorded in the Reservation, it is entered automatically.)

    In the Reference # field you can type in a reference number (such as the check number).

11. Click Post.
The Deposit Payments dialog box closes, and the payment is displayed on the Pre-Billing screen.

**Deposit Payment dialog box fields**

<table>
<thead>
<tr>
<th>Field name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Department</td>
<td>The method of payment for the deposit (cash, credit card, or foreign currency, etc.).</td>
</tr>
<tr>
<td>Amount</td>
<td>The deposit amount.</td>
</tr>
<tr>
<td>Reservation Type</td>
<td>The type of reservation.</td>
</tr>
<tr>
<td>Window Number</td>
<td>The folio to credit for the deposit. In Routing, you can open up to 98 folios per guest.</td>
</tr>
<tr>
<td>Print Receipt</td>
<td>Whether a receipt is to be printed for the deposit.</td>
</tr>
<tr>
<td>Pre-paid commission</td>
<td>The percentage or amount of the pre-paid commission.</td>
</tr>
<tr>
<td>Total Amount</td>
<td>The commission amount (or percentage) plus the deposit amount.</td>
</tr>
<tr>
<td>Supplementary Info/ Credit Card Number</td>
<td>The credit card number, if a deposit is made by credit card. If payment is by cash or check, you can type in information such as guest name and/or reservation confirmation number.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the transaction. (Inserted by the system.)</td>
</tr>
<tr>
<td>Reference #</td>
<td>If a deposit is made by credit card, you can enter the credit card expiry date. If the deposit is made by check, you can enter the check number.</td>
</tr>
</tbody>
</table>

**Deposit Adjustments**

In some circumstances, it may be necessary to make adjustments to an initial deposit:

- A guest may make an additional deposit payment.
- All or part of a deposit may be returned to a guest.
- A deposit may also be retained even though the guest never checked in.
- The sum of the returned and the retained portions of the deposit must be less than or equal to the total deposit received.

**How to adjust a deposit:**

1. From the Reservation Options, click **PRE-BILLING**.

   The Cashier Login screen with your cashier number appears.

   **Note:** Performing any operation related to the cashier's work requires a user password.

2. Type in your password, and click **LOGIN**.

   The Pre-Billing dialog box appears. If a deposit amount has already been paid, it will be displayed.
3. **Click DEPOSITS.**

   The Deposit options appear.

4. **Select the desired option:**
   - Payment: Accept an additional amount.
   - Return: Deposit is returned and subtracted from the balance.
   - Retain: Deposit is retained and added to balance.
   - Abort: Closes deposit options without making any adjustment.

   If **PAYMENT** or **RETURN** was selected, the Deposit Payment dialog box for the selected guest opens.

   If **RETAI N** was selected, the Retain Deposit dialog box opens.

   Although this dialog box contains many more fields than the Deposit Payment dialog box, the activated fields that need to be filled in are the same in both dialog boxes.

5. **In the Payment Department field, click on the down arrow to open the drop-down list, and select the payment method.**

   If you are retaining a payment, the Payment Department is automatically selected:

   - 644: Retain Deposit

6. **Type in the Amount to be returned or added.**

7. If the deposit is paid by a travel agent whose commission is pre-paid, either type in the percentage for the Pre-Paid Commission, or type the amount in directly.

   Suite 7 calculates the Total Amount, which is the sum of the deposit and the commission.

8. **In the Reference # field you can type in a reference number (such as the check number).**

   The Supplementary Info field is not present in the Deposit Retain dialog box. It is replaced by the remarks field.

9. **In the Window Number field, choose the number of the window where you want the deposit to appear once the guest checks in.**

10. **To change the Reservation Type, click the down-arrow and select the new Reservation Type.**

11. **If you want to print a receipt for the deposit, check the Print Receipt checkbox at the bottom of the dialog box.**

12. **Click POST.**

   The Deposit Payments dialog box closes, and the payment is displayed on the Pre-Billing screen.

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**Leisure**

**Scheduling leisure activities**

The leisure activities are bookings for hotel outlets such as restaurants, spa, golf tee time, hairdresser or any other leisure activity or service.
To schedule leisure activities:
1. From the Reservation Options dialog box, click LEISURE.
   The Leisure dialog box appears.
2. From the Leisure dialog box, select the Outlet.
3. Select a Service from the list of Outlet services.
4. Type in the date or click the drop down arrow and select a date from the calendar.
5. Click SELECT.
   The Leisure Scheduling dialog box appears for the selected service.
6. Select the time and location or person for the activity.
7. Click BOOKING.
   The Leisure Booking dialog box appears, showing the information pertaining to the booking and the guest.
8. Edit the fields as desired.
9. Click OK.
   The Leisure Booking dialog box is closed.
10. The Leisure Schedule dialog box reappears, with the appropriate blocks marked, and the details of the booking in the rectangle at the lower left below the Date field.
    The Leisure Schedule dialog box options are activated.
11. Click CLOSE
    For more information on the leisure activities, see Leisure Activities.

Authorize Direct Billing
Direct billing is used for guests who are not paying their bill upon check out. This allows for the authorization of a guest to check out of a hotel and have the balance transferred to the City Ledger.
Later the balance is billed to the person or the company who is responsible for paying the charges. Only users with authorization (user rights) can authorize direct billing. Other users are able to confirm authorization of direct billing, and if authorization exists, to check out the guest.

Confirming authorization for direct billing when the user has no rights for authorization:
To confirm authorization for direct billing when the user has no rights for authorization:
1. From the Reservation Options dialog box, click AUTH. DIRECT BILL.
   If the guest is authorized for direct billing, the Reservation authorized for direct bill message appears.
   If the guest is not authorized for direct billing, the Reservation NOT authorized for direct bill message appears.
2. Click OK.
   The message box is closed.
Authorizing direct billing

To authorize direct billing:
1. From the Reservation Options dialog box, click AUTH. DIRECT BILL.
   A confirmation message appears.
2. To authorize direct billing of the guest account, click Yes.
   The Authorization completed notification box appears.
3. Click OK.
   The direct billing authorization is complete.

Note: When a reservation has City Ledger authorization, making an add on reservation will not copy the authorization.

Cancelling authorization for direct billing

To cancel authorization for direct billing:
1. From the Reservation Options dialog box, click AUTH. DIRECT BILL.
   A message appears displaying who created the authorization.
2. To cancel the authorization, click Yes.
   The Authorization cancelled message appears.
3. Click OK.
   The authorization is cancelled.

Q Rooms

This option is used in the event that a guest arrives to check-in before the room is ready for him. For complete information about Q Rooms, see the Q Rooms chapters in the Suite 7 Front Desk Manual and the Suite 7 Rooms Management Manual.

When a guest arrives before the expected arrival time, and the room is not yet ready, the room is put into the queue. The list of rooms on the queue appears in Rooms Management so that the Housekeeping staff can give them top priority. As soon as the room has been cleaned and inspected, Housekeeping indicates this on the Q rooms list, and the guest can be checked in.

It may also occur that a room is on the queue, and in the meantime a different guest is checked in and assigned a room of the same type that is on queue. In this case, you will be informed that a room of this type is on queue, and you may choose to assign this room to the waiting guest and find another room for the newer check-in.

Note: To use this option, you must activate the Q-Rooms parameter. See the "Manager" chapter in the Suite 7 Configuration Manual.

How to assign a room to the queue:
1. From the Reservation Options dialog box, click Q ROOMS.
   You are asked to confirm the Q Room assignment.
2. Click Yes.
The room is added to the queue:
- The length of time the room has been in the queue appears at the top of the Arrivals screen when the guest name is selected from the listing.
- The room appears in the Front Desk Q Rooms listing. (See the *Suite 7 Front Desk Manual.*)
- The room appears in the Rooms Management Q Rooms listing. (See the *Suite 7 Rooms Management Manual.*)

If you assign a room of a type that is on the queue to a different guest who is checking in, you will be notified. Perhaps the reservation on queue should be given priority for this room.

**Accessing the Q Rooms listing**

**To display a listing of the rooms that are on the queue, there are several options:**
- Front Desk: select Q Rooms in the Advanced Search dialog (Front Desk>Arrivals> Advanced Search) to display all reservations currently in the queue. (See the *Suite 7 Front Desk Manual.*)
- House Status: shows the number of rooms currently on the queue with drill down possibilities.
- Rooms Management: from the Rooms Management toolbar, click the Q Rooms icon to display a list of the reservations that are on the queue, as well as a summary by room type. (See the *Suite 7 Rooms Management Manual.*)

**Q Room Cancellations**

If you cancel a checked-in reservation that was previously in the queue, you will be asked what to do with the reservation. There are three options:
- Put the reservation back in the queue in its original position
- Put the reservation at the end of the queue.
- Remove the reservation from the queue completely

If a queued reservation becomes a no show, the reservation is automatically removed from the queue.

**Package Options**

A reservation can have packages attached to it via the rate code or through the packages field. The Package Options option displays a list of all package elements for which an allowance has been created. The creation of the allowance is done automatically by Suite 7 at check-in and during the night audit. You also can route a package allowance to another guest so, if the charge for the package is posted on the other guest’s folio, it will use the correct allowance.

**Viewing package elements for which an allowance has been created**

**To view package elements for which an allowance has been created:**
From the Reservation Options dialog box, click PACKAGE OPTIONS.
The Reservation Packages dialog box appears.
**Reservation Packages dialog box fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>The package element code.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the department code that the allowance was created for. For example, department code 420 is Massage.</td>
</tr>
<tr>
<td>Date</td>
<td>The date for the allowance.</td>
</tr>
<tr>
<td>Allowance</td>
<td>The amount of the allowance.</td>
</tr>
<tr>
<td>Posted</td>
<td>The amount that was posted.</td>
</tr>
<tr>
<td>Over</td>
<td>Over or under the allowance amount.</td>
</tr>
</tbody>
</table>

**Reservation Packages dialog box buttons**

<table>
<thead>
<tr>
<th>Click this button</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Routings</td>
<td>See if and where packages are routed.</td>
</tr>
<tr>
<td>Route Packages</td>
<td>Display Profile screen, from which you choose routing destination. If routing already exists, the system displays the name of the guest the packages are routed to, and enables you to cancel the routing instruction.</td>
</tr>
<tr>
<td>Refresh</td>
<td>Check and updates changes made in packages. This option is necessary to run only if the guest has checked in already, and if you made changes to packages. If you attach a new package to the reservation, change or remove an attached package, or when you change the rate code to another rate with different packages.</td>
</tr>
</tbody>
</table>

**Routing the allowance**

The routing package option allows you to redirect package allowances from one account to another account. For example, the children's charges could be directed to the parent's room.

The target room is the room that the charges are being directed to. Suite 7 determines whether the target room can exceed its own allowance and use the allowance that might be available for the other source rooms.

When you route packages, you redirect the package allowance for all package postings connected to the room. The system will add up all package allowances accumulated on the target room in order to produce a total for the particular department code allowance.

**How to route the allowance:**

1. Select the reservation that the package is being routed from.
2. From the Reservation Options dialog box, click PACKAGE OPTIONS. The Reservations Packages dialog box appears.
3. Click ROUTE PACKAGES. The Route Packages dialog box appears.
4. From the Route Packages dialog box, select the reservation where the allowances are being routed to.
You can search for the reservation by typing the first few letters of the name in the Name field or type the beginning of the room number in the Room No field.

5. Click OK.
The Route Packages dialog box is closed. A confirmation message appears.

6. Click Yes or No.
The allowance is routed.

Displaying routings
You can display the reservation that the allowance has been routed to.

To display routings:
1. Select the reservation that the package is being routed from.
2. From the Reservation Options dialog box, click PACKAGE OPTIONS.
The Reservations Packages dialog box appears.
3. Click DISPLAY ROUTINGS.
A message appears displaying the guest name that the allowance has been routed to.
4. Click OK.
The message box is closed.

Checking and updating changes
You can check and update changes made in packages. This option is necessary to run only if the guest has checked in already, changes were made to the packages. For example, attach a new package to the reservation, change or remove an attached package, or change a rate code to another rate with different packages.

How to check and update changes:
1. From the Reservation Options dialog box, click PACKAGE OPTIONS.
The Reservation Packages dialog box appears.
2. From the Reservation Packages dialog box, click REFRESH.
The Reservation Packages dialog box appears displaying the updated package items.

 Cancelling routing of package charges
You can cancel the routing of package charges.

To cancel routing of package charges:
1. From the Reservation Options dialog box, click PACKAGE OPTIONS.
The Reservation Packages dialog box appears.
2. Click ROUTE PACKAGES.
A confirmation message appears.
3. Click Yes to remove package routing.
The package routing is cancelled.
Virtual Numbers

If your system is configured for DID (Direct Inward Dialling), you can assign a specific telephone or fax number to a guest reservation for the duration of guest's stay, automatically or upon request.

The DID numbers serve the guest as the guest's private line once they check in, until they check out. The Virtual Numbers option allows people outside the hotel to dial or fax the guest directly, using the assigned numbers, without having to go through the hotel operator. A virtual DID number can be guest-based or room-based. A guest-based virtual number will always follow the guest, including through room moves.

Room-based virtual numbers need to consider other guests. For example, if one of the share guests checks-out, the system will not unassign the number automatically, but will check first if there is a sharer in the room. The same applies to room moves.

A virtual number can also be assigned permanently to a guest profile.

Once a virtual number has been linked to a profile, it is marked as permanent and cannot be used for another assignment. At check-in, the respective number will be displayed in the configured pool of number (assigned VN number dialog box), and will be available for selection. If a guest with a permanent virtual number has several rooms at the same time, Suite 7 will use the number for the first reservation that checks in (if configured set to Auto Assign). However, the system can only assign virtual numbers for rooms that have been configured for the respective number pool.

Note: The use of virtual numbers and the available functionality depends entirely upon the capabilities and the feature set of the external system and the interface used in the hotel.

Assigning a new virtual number

To assign a new virtual number:

1. From the Reservation Options dialog box, click VIRTUAL NUMBERS. The Virtual Numbers dialog box appears.
2. Click NEW. The Assign Virtual Number dialog box appears.
3. Click the Pool drop down arrow and select the line to which you want to assign the number. The Pool list contains the list of the telephone lines connected to the room.
4. From the list of extension numbers, scroll to and highlight the number you wish to assign.
5. Click ASSIGN. The number appears in the Virtual Numbers dialog box.
6. Click Close. The Virtual Numbers dialog box is closed.
Deleting a virtual number

To delete a virtual number:
1. From the Reservation Options dialog box, click VIRTUAL NUMBERS.
   The Virtual Numbers dialog box appears.
2. Click DELETE.
   A confirmation message appears asking if you want to delete the DID number.

   **Note:** Some lines, such as fax and modem lines, require a DID virtual number. You cannot delete the assignment. However, you can change the assigned number.

3. Click YES.
   The number is deleted from the list.
4. Click CLOSE.
   The Virtual Number dialog box is closed.

Changing the assigned virtual number

Some lines, such as fax and modem lines, require a DID virtual number. You cannot delete the assignment. However, you can change the assigned number.

How to change the assigned virtual number:
1. From the Reservation Options dialog box, click VIRTUAL NUMBERS.
   The Virtual Numbers dialog box appears.
2. Select the number that you want to change.
3. Click DELETE.
   A confirmation message appears asking if you change the assigned the DID number.
4. Click YES.
   The Assigned Virtual Number dialog box appears.
5. From the list of extension numbers, scroll to and highlight the number you wish to assign.
6. Click ASSIGN.
   The Assigned Virtual Number dialog box is closed. The Virtual Number dialog box appears with the new assigned virtual number.
7. Click CLOSED.
   The Virtual Number dialog box is closed.
Changes

You can view all the changes made to a reservation since the original reservation was made.

To view the changes made to a reservation:
1. From the Reservation Options dialog box, click CHANGES.
   The Reservation Changes dialog box appears.
2. Click CLOSE.
   The Reservation Changes dialog box is closed.

Shares

The Shares option allows you to combine two (or more) reservations to share the same room or to break an existing share reservation.

Creating a share reservation with a new guest

To create a share reservation with a new guest:
1. From the Reservation Options dialog box, click SHARES.
   The Combine Share Reservations dialog box appears.
   The name of the current reservation is displayed in the upper pane.
2. Fill in the (last) Name, First Name, and (number of) Persons fields.
3. Click NEW RESERV.
   If the guest does not have an existing profile, Suite 7 automatically creates a profile for the guest and the Creation of Share Reservation dialog box appears displaying the names of the shared guest.
   If the guest has a profile, the Profile Search screen appears guest's name.
   a. From the Profile Search dialog box, select the guest profile.
   b. Click OK.
   The Combine Share Reservations dialog box appears with the name filled in.
   c. From the Combine Share Reservations dialog box, click OK.
   The Creation of Share Reservation dialog box appears displaying the names of the shared guest.
4. You can change the price of the room for one or both guests.
5. Click OK.
   The Creation of Share Reservation dialog box is closed.

Share Reservations Options

<table>
<thead>
<tr>
<th>Click this button</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>One guest pays the full amount and the second guest does not pay anything. Which guest pays depends on where the cursor is when the option is selected.</td>
</tr>
<tr>
<td>Split</td>
<td>Split the charge evenly.</td>
</tr>
<tr>
<td>Click this button</td>
<td>To do this</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Full</td>
<td>Each guest pays the full amount of the given rate code. For instance, if the rack rate is $90 for single occupancy and $140 for double, each guest pays $90 if the Full option is activated.</td>
</tr>
<tr>
<td>Combine</td>
<td>Add a share from an existing reservation.</td>
</tr>
<tr>
<td>Break</td>
<td>Cancel the share. The guests will no longer share the same room but have separate rooms.</td>
</tr>
<tr>
<td>Go To</td>
<td>Open the reservation of selected sharing guest.</td>
</tr>
<tr>
<td>OK</td>
<td>Save the share and close the screen.</td>
</tr>
<tr>
<td>Abort</td>
<td>Close the screen.</td>
</tr>
</tbody>
</table>

Creating a share reservation with an existing reservation

To create a share reservation with an existing reservation:

1. From the Reservation Options dialog box, click SHARES.
   The Combine Share Reservations dialog box appears.

2. Click COMBINE RESERV.
   The Combine Share Reservations grid appears.

3. Search for the guest by typing the guest's name, room number, or scroll down the list.

4. Select the guest and click OK.
   The Combine Share Reservations dialog box appears with the name of both guests.

5. Click OK.
   The Share Reservation dialog box appears displaying the names of the shared guest.

6. You can change the price of the room for one or both guests.

7. Click OK.
   If the room types for the two guests are different, you will be asked to select the room type to assign to the shared reservation.

8. Click the appropriate button.

Creating a share reservation with a checked-in guest

You can create a share reservation with a checked-in guest. However, be sure that the sharing guest has not been assigned a room number.

To create a share reservation with a checked-in guest:

1. From the Reservation Options dialog box, click SHARES.
   The Combine Share Reservations dialog box appears.
   The name of the current reservation is displayed in the upper pane.

2. Click COMBINE RESERV. (If the sharing guest is a new reservation, see step 3 in Creating a share reservation with a new guest)
   The Combine Share Reservations grid appears.
3. Search for the guest by typing the guest's name, room number, or scroll down the list.
4. Select the guest and click OK.
   The Combine Share Reservations dialog box appears with the name of both guests.
   The Combine Share Reservations dialog box appears with the name filled in.
5. From the Combine Share Reservations dialog box, click OK.
   A message appears asking for confirmation of the room number.
6. Click Yes.
   The Creation of Share Reservation dialog box appears displaying the names of the shared guest. (See Share Reservations Options.)
7. You can change the price of the room for one or both guests.
8. Click OK.
   The Creation of Share Reservation dialog box is closed.

**Breaking a share reservation**

You can break the share reservation when two or more guests share a room. The guests are moved to separate rooms.

**To break a share reservation:**

1. From the Reservation Options dialog box, click SHARES.
   The Share Reservations dialog box appears.
2. Click BREAK.
   The price resets to the appropriate rate for each reservation.
3. Click OK.
   The share is broken and the Share Reservation dialog box is closed.

**Traces**

The Traces option allows you to communicate guest's requests with other hotel staff. The Traces option allows the hotel to keep track of things that have to be done for guests on a specific date. For example, if the guest needs a baby crib, you advise housekeeping that they need to bring a crib to that guest on that date. On the specified date entered, Suite 7 notifies housekeeping, through the trace report, that a crib is requested. You can create, modify, delete or resolve a trace or mark it as completed.

In addition, there is a special type of trace called Action trace. The Action trace relates to changes in the reservation itself (such as change of rate code, price, or the number of guests), and is resolved automatically during the night audit. A reason may be entered for an action trace. An Action trace cannot be modified. Optionally a reason can be entered for an action trace.

**Creating a new trace**

**To create a new trace:**

1. From the Reservation Options dialog box, click TRACES.
   The Traces dialog box appears.
2. Click New to enter a new trace.
The New Trace Entry dialog box appears.

3. Enter From and Until Trace Dates.

4. Under Trace Department, select the department the trace is for.
   On the right-hand side, a list of texts that you may select from appears under Trace Texts. A free format Text Box is also displayed.

5. Highlight the text you want and double-click it, and/or type your own text in the Text box.

   **Tip:** Alternatively, you can double-click the text or drag and drop it into the Text pane.

   The selected text appears in the Text box and the Save button is activated.

6. Click SAVE.
   The Traces dialog box reappears with the text you entered.
   If the guest is part of a group, the Save Traces dialog box appears.

7. Click the appropriate radio button.

8. Click OK.
   The Traces dialog box appears.

9. From the Traces screen, click CLOSE.
   The Traces dialog box is closed.

**Editing text on the Traces list**

**To edit text on the Traces list:**

1. From the Reservations Options dialog box, click TRACES.
   The Traces dialog box appears.

2. Click EDIT.
   The Edit Trace Entry dialog box appears.

3. Click into the Text at the bottom right and make the necessary changes.

4. Click SAVE.
   The Edit Trace Entry dialog box is closed and the Trace screen appears.

5. From the Traces screen, click CLOSE.
   The Traces dialog box is closed.

**Deleting a trace**

**To delete a trace:**

1. From the Reservations Options dialog box, click TRACES.
   The Traces dialog box appears.

2. Click DELETE.
   A confirmation message appears.

3. Click YES.
   The trace is deleted and no longer appears on the Traces dialog box.
4. Click **CLOSE**.
   The Traces dialog box is closed.

**Resolving a trace**
When a trace is marked resolved, it indicates that the trace has been performed.

**To resolve a trace:**
1. From the Reservations Options dialog box, click **TRACES**.
   The Traces dialog box appears.
2. Select the trace that you want resolved.
3. Click **RESOLVE**.
   The trace's status changes from Not Resolved to Resolved, along with the date, time, and the user who changed its status.
4. Click **CLOSE**.
   The Traces dialog box is closed.

**Unresolving a trace**
If a trace was mistakenly marked as resolved, you can unmark the trace to unresolved.

**To unresolve a trace:**
1. From the Reservations Options dialog box, click **TRACES**.
   The Traces dialog box appears.
2. Select the trace that you want unresolved.
3. Click **UNRESOLVED**.
   The trace's status changes from Resolved to Not resolved.
4. Click **CLOSE**.
   The Traces dialog box is closed.

**Credit Cards**

**Entering an Approval Code Manually**
To accept a credit card settlement from a guest when your regular credit card interface is down, you can enter the approval amount and approval code manually, using the **ENTER APPROVAL CODE** radio button. This option is only available in hotels that have the Credit Card Interface installed.

How to enter approval code manually:
1. From the Reservations Options dialog box, click **CREDIT CARDS**.
   The Credit Card Interface dialog box appears.
2. Click the Enter approval code radio button.
3. Click **OK**.
   The Enter Approval Code dialog box appears. If an amount and code have already been entered, they appear in the fields.
4. Type in the Approval Amount and the Approval Code.
5. Click OK.
   The Enter Approval Code dialog box is closed and the Credit Card Interface
dialog box appears.

6. Click Close.
   The Credit Card Interface dialog box is closed.

**Altering the Current Authorization Rule**

The Authorization Rule is the method the credit card interface uses to calculate
the authorization amount. You can change the default method, for a particular
guest, using the AUTHORIZATION RULE radio button.

**How to alter the authorization method:**

1. From the Reservation Options dialog box, click CREDIT CARDS.
   The Credit Card Interface dialog box appears.

2. Click the Authorization Rule radio button.

3. Click OK.
   The Authorization Rule dialog box appears.

4. Select the new calculation method from the drop down list.
   The selected method appears in the field.

   **Note:** Depending on which method you choose, an Amount field
   may also appear on the dialog box.

5. Click OK.
   The Credit Card Interface dialog box appears.

6. Click Close.
   The Credit Card Interface dialog box is closed.

**Getting Authorization for a Higher Amount**

When you want to get approval for an additional amount, above what the credit
card company has already approved, use ADDITIONAL AUTHORIZATION.

**How to get authorization for an additional amount:**

1. From the Reservations Options dialog box, click CREDIT CARDS.
   The Credit Card Interface dialog box appears.

2. Click the Additional authorization radio button.

3. Click OK.
   The Additional authorization dialog box appears.

4. Type in the new authorization amount.

5. Click OK.
   Contact is made through the interface to the credit card company with the
   approval request.
   If the amount is approved, a message is displayed showing the approval code
   and the new approval amount. (These fields are automatically updated on the
guest record.)
If the amount is not approved, the credit card company will tell you that no approval has been received and you must enter it manually. (Normally you would call the credit card company for an approval and then record it manually as in Entering an Approval Code Manually).

6. When finished click OK to close the Additional authorization dialog box.
   The Credit Card Interface dialog box appears.
7. Click Close.
   The Credit Card Interface dialog box is closed.

**Courtesy Card Handling**

*Note:* Not supported at this time.

**Accompanying**

The Accompanying option enables you to register each guest in the room, even if there is only one actual reservation for that room.

**Registering a guest as an accompanying guest**

*To register a guest as an accompanying guest:*

1. From the Reservation Options dialog box, click **ACCOMPANYING**.
   The Accompanying dialog box appears.
2. Click **New**.
   The Accompanying Edit dialog box appears.
3. Fill in as much of the requested information as possible. Note that Name and First Name are highlighted, meaning they are mandatory fields.
4. Click **OK**.
   The Accompanying dialog box reappears, with the name of the accompanying person and checkmark in the Attach field. The checkmark indicates that the accompanying guest is included in the selected reservation. A search (for example, by the telephone operator) will show the accompanying person in a particular room.
5. To add another accompanying person, repeat steps 1-4.
6. From the Accompanying dialog box, click **CLOSE**.
   The Accompanying dialog box is closed.

**Unlinking an accompanying guest**

You can break the link that attaches the accompanying guest from the specific reservation.

*To unlink an accompanying guest:*

1. From the Reservation Options dialog box, click **ACCOMPANYING**.
   The Accompanying dialog box appears.
2. Select the accompanying guest and click **ATTACH**.
   The link that attaches the accompanying guest from the specific reservation is broken. The checkmark next to the name disappears.
3. Click CLOSE.
   The Accompanying dialog box is closed.

**Editing an entry on the Accompanying list**

**To edit an entry on the Accompanying list:**
1. From the Reservations Options dialog box, click ACCOMPANYING.
   The Accompanying dialog box appears.
2. Click EDIT.
   The Accompanying Edit dialog box appears, with the information on the person selected.
3. Make the necessary changes.
4. Click OK.
   The Accompanying Edit dialog box is closed and the Accompanying dialog box appears.
5. Click CLOSE.
   The Accompanying dialog box is closed.

**Deleting a name from the Accompanying list**

**To delete a name from the Accompanying list:**
1. From the Reservations Options dialog box, click ACCOMPANYING.
   The Accompanying dialog box appears.
2. Select the accompanying name that you want to delete.
3. Click DELETE.
   A confirmation message appears.
4. Click YES.
   The name is deleted from the Accompanying list.
5. Click CLOSE.
   The Accompanying dialog box is closed.

**Messages**

You can view, create, edit or delete messages for guests.

**Viewing a guest's messages**

**To view a guest's messages:**
1. From the Reservation Options dialog box, click MESSAGES.
   The Messages dialog box appears.
2. Click CLOSE.
   The Messages dialog box is closed.
Creating a new message for a guest

To create a new message for a guest:

1. From the Reservation Options dialog box, click MESSAGES.
   The Messages dialog box appears.

2. Click NEW.
   The Guest New Message dialog box appears.

   **Note:** The cursor is in the window pane on the left-hand side of the screen.

3. Type a new message, or double-click a text message in the window pane to the right, or highlight the text, and drag and drop.
   If you double-click a text message, or drag and drop it, it is copied into the left window pane.

4. Click SAVE or PRINT. (Print also saves.)

5. Repeat steps 2-4 for any other messages you want to leave.
   The Messages dialog box reappears after each save displaying the date and time the messages were received, and the text of the currently highlighted message.

6. Click CLOSE.
   The Messages dialog box is closed.
   If the guest has messages, the lamp is displayed on the lower left corner of the guest’s Reservation screen. After the guest’s messages were received, the message colour is changed to green.

**Messages options**

<table>
<thead>
<tr>
<th>Click this button</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lamp On</td>
<td>Light an indicator lamp on the telephone in the guests’ room to let them know there is a message. There is also notice of this in the Status column of the Messages dialog box.</td>
</tr>
<tr>
<td>Print</td>
<td>Print and save the message.</td>
</tr>
<tr>
<td>Received</td>
<td>Indicate that the message was given to the guest and shows the status as received.</td>
</tr>
<tr>
<td>Not Received</td>
<td>Indicate that the message was not given to the guest and shows the status as not received.</td>
</tr>
<tr>
<td>Receive All</td>
<td>Indicate that all messages were communicated to the guest and show the status as received. Click this button when you have given the guest all of his or her messages.</td>
</tr>
</tbody>
</table>
Editing a guest's message

To edit a guest's message:
1. From the Reservation Options dialog box, click MESSAGES.
   The Messages dialog box appears.
2. Highlight the message that you want to edit.
3. Place the cursor in the text box located in the lower pane of the dialog box.
4. Type the necessary changes to the message.
5. Click CLOSE.
   The Messages dialog box is closed.

Deleting a guest's message

To delete a guest's message:
1. From the Reservation Options dialog box, click MESSAGES.
   The Messages dialog box appears.
2. Highlight the message that you want to delete.
3. Click DELETE.
   A confirmation message appears asking you to confirm the deletion.
4. Click YES.
   The highlighted message disappears from the list in the upper pane of the Messages dialog box.
5. Click CLOSE.
   The Messages dialog box is closed.

History

The History option allows you to view the details of all previous stays on file. You also can check whether there are any recorded Turnaways for the guest. This option is also used in the guest profile. See History in the Profiles section.

Viewing a guest's history

To view a guest's history:
1. From the Reservation Options dialog box, click HISTORY.
   The Profile screen appears displaying the guest's history.
2. Click CLOSE.
   The Profile screen is closed.
Registration Card

This option allows you to print a registration card for the selected reservation. This is especially useful for same day reservations.

Printing a registration card

To print a registration card:
1. From the Reservations Options dialog box, click REG. CARD.
2. Select the template to be used for printing
3. Click OK.
   Suite 7 prints the registration card for the guest.

Confirmation

After a guest has made a reservation, you can send a confirmation letter to the guest with all the reservation details incorporated in a prepared form letter. You can send the confirmation to the guest by sending a hard copy of the confirmation by fax, mail, or using the Suite 7 E-mail.

If the reservation is cancelled or a no-show, the "Confirmation" button changes to "Confirmation Cancelled", but the button remains active, and a letter confirming the cancellation or no-show can still be requested.

Note: Reprinting a confirmation letter is controlled by user rights.

Viewing and/or editing a confirmation letter

To view and/or edit a confirmation letter:
1. From the Reservations Options dialog box, click CONFIRMATION.
   The Print Confirmation Letter dialog box appears.
2. From the Letter Name drop-down menu, choose the type of confirmation letter.
3. Highlight who the confirmation letter is being sent to.
4. Click View.
   The Edit Document screen with the text of the confirmation letter appears.
5. Edit the confirmation letter as required.
6. Click File on the menu bar.
   The File menu appears.
7. Click Save and/or Exit. (Exit will also give the option to save.)
   The Edit Document screen is closed and the Print Confirmation Letter dialog box appears.
8. Click Close.
   The Print Confirmation Letter dialog box is closed.
Printing a confirmation letter
You can print a confirmation letter.

To print a confirmation letter:
1. From the Reservation Options dialog box, click CONFIRMATION. The Print Confirmation Letter dialog box appears.
2. From the Letter Name drop-down menu, choose the type of confirmation letter.
3. Highlight who the confirmation letter is being sent to.
4. Click PRINT. The confirmation letter is sent to the printer.
5. Click CLOSE. The Print Confirmation Letter dialog box is closed.

E-mailing a confirmation letter
You can e-mail a confirmation letter.

To e-mail a confirmation letter:
1. From the Reservation Options dialog box, click CONFIRMATION. The Print Confirmation Letter dialog box appears.
2. From the Letter Name drop-down menu, choose the type of confirmation letter.
3. Highlight who the confirmation letter is being sent to.
4. Click E-MAIL. The Send Mail dialog box appears. It comprises two tabs, Message and Attachments. The Message tab is opened.
5. Fill in the Message tab fields.
6. Save this EMAIL address to profile.
7. Click OK. A confirmation message appears asking you to confirm if the email address should be saved to the profile.
8. Click YES to save it to the profile. A confirmation message appears asking you to confirm the sending of the e-mail.
9. Click YES. The confirmation is then sent automatically with the e-mail message and the Print Confirmation Letter dialog box appears.
8. Click CLOSE. The Print Confirmation Letter dialog box is closed.
Delete

Deleting a reservation

To delete a reservation:
1. From the Reservation Options dialog box, click DELETE.
   The Confirm Deletion dialog box appears.
2. Click YES.
   The reservation is deleted.

Add On

This option makes a copy of the current reservation, with a different reservation number. Suite 7 notifies you if the reservation is not possible due to availability. This option may be used for a guest who wants to add an additional room to his reservation or a guest who plans to return to the hotel in the future.

Note the following limitations:

➢ When creating an ’Add On’ for a reservation that has been assigned two or more rooms, the ’Add On’ copies the reservation for only one room.
➢ An add on reservation will not copy routing instructions that are simply going to another window.

Creating an Add On reservation

To create an Add On reservation:
1. From the Reservation Options dialog box, click ADD ON.
   A confirmation message appears.
2. Click YES.
   The New Reservation screen appears.
3. Click OK after the desired changes to the Add-on reservation have been made.
   Suite 7 confirms the new reservation and notifies you of its number.
4. Click OK.
   The Main Reservations dialog box appears for the original guest.

Party

Groups of guests travelling together may reserve several rooms in a hotel. Whenever the # Rooms field in the Reservation dialog box is greater than one, the Party option is activated. When you split the reservations you will have the option to change the name for each reservation.
Making a party reservation

To make a party reservation:
1. Open the reservation in the Main Reservation dialog box.
2. Type the number of rooms you would like to reserve for the party in the # Rooms field.
   A confirmation message appears.
3. Click Yes to confirm the number of rooms for the party.
4. Complete the necessary fields in the Main Reservation dialog box.
5. Click OK.
   After the reservation is saved the Party option is activated in the Reservation Options dialog box.

Splitting a party reservation

To split a party reservation:
1. Highlight the reservation that you want to split.
2. Click OPTIONS.
   The Reservation Options dialog box appears.
3. Click PARTY.
   The Party Reservation dialog box appears.
4. Click SPLIT to split one room, or SPLIT ALL to split all rooms.
5. To change a Guest Name, highlight the existing name, enter the new name, and press TAB.
   The Profile Search screen appears.
6. Create New, or click OK to select an existing profile (see also Profiles).
7. Change the room type and the number of adults and children if necessary.
8. Click OK.
   The system confirms that it created the party reservation and gives a reservation number.
9. Click OK.
   The Party Reservation dialog box is closed.

Breaking the connection of a reservation and the party

After a room has been split from a party, you can break its connection to the party. This is done with the Break option, which is activated after a split.

How to break the connection of a reservation and the party:
1. Highlight the reservation that you want to split.
2. Click OPTIONS.
   The Reservation Options dialog box appears.
3. Click PARTY.
   The Party Reservation dialog box appears.
4. Highlight the guest who wants to break from the party, and click BREAK.
5. To break just the highlighted guest from the party, click YES. To break all reservations from the party, click ALL.

The Party Reservation dialog box appears.

---

Note: After a guest has been broken from the party, the Break option is changed to a Connect option. The Break is a toggle switch for severing and reconnecting the link between a guest and a party.

---

6. Click OK to save your changes, or ABORT to undo them.

The Party Reservation dialog box is closed.

**Room Move**

You can move a reservation from one room to another room after the guest has checked in.

**Moving a reservation from one room to another room**

**To move a reservation from one room to another room:**

1. From the Reservations Options dialog box, click ROOM MOVE.

The Move Room dialog box appears.

2. From the Move Room dialog box, type a new room number in the Room No. field box or click the drop down arrow and select a room number from the Room Search Room list.

3. Click the drop down arrow and select a reason for the move from the Reasons list.

4. Click YES.

A confirmation message appears.

5. Complete the confirmation message and click Yes or No.

The room number is changed.

**Waitlist**

This option allows you to move a reservation to the waitlist. A waitlisted reservation does not affect the availability or occupancy status of a hotel.

If a requested room category is overbooked, a guest can be put on the waitlist. If the room or rate becomes available, the guest reservation can be removed from the waitlist and the reservation confirmed. This option is displayed only if your system is configured for waitlist.

For further explanation about waitlist's, see Waitlist.

**Moving a reservation to the Waitlist**

**To move a reservation to the Waitlist:**

1. From the Reservation Options dialog box, click WAITLIST.

The Waitlist dialog box appears.

2. Click the Reasons drop down arrow and select one of the reasons offered.
The Yes button at the bottom of the dialog box is activated.

3. Type the guest's telephone number in the Phone field or leave the field blank.

4. Click Yes.

   The guest reservation is moved to the Waitlist.

**Regrets**

If a room category is overbooked, a reservation can be move to the Regrets list, rather than the Waitlist. The hotel makes no further effort to contact the guest, even if there is an eventual vacancy.

**Moving a reservation to the Regrets list**

**To move a reservation to the Regrets list:**

1. From the Reservation Options dialog box, click REGRETS.

   The Regrets dialog box appears.

2. Click the Reasons drop-down menu and select one of the reasons offered.

   The Yes button at the bottom of the dialog box is activated.

3. Type the guest's telephone number in the Phone field or leave the field blank.

4. Click YES.

   The reservation is moved to the Regrets list.

**Locator**

If a guest expects to be out of his room, the Locator option can keep track of his location. The Locator date can be set within the guest's stay period.

**Note:** The Locator option is active only for guests arriving today or in-house guests.

**Entering a guest's location**

**To enter guest location:**

1. From the Reservation Options dialog box, click LOCATOR.

   The Guest Locator dialog box appears.

2. In the Location pane on the left-hand side of the Locator dialog box, type where the guest is expected to be, or double-click a location from the Location List, in the right-hand pane, or drop and drag from the Location List.

   The OK and CLEAR buttons at the bottom of the Guest Locator dialog box are activated.

3. In the Until field, set the expected time and date.

4. Click OK.

   The Guest Location dialog box is closed.
Guest Awards

Many hotels and credit cards have guest award programs in place. The Guest Awards option provides access to all guest award functions. You can:

- Assign an award program to the reservation.
- Delete an award program from the reservation.
- View the points status.
- Calculate award points.
- Award an award when the necessary points have been earned.

**How to assign an award program:**

1. From the Reservation Options, click GUEST AWARDS.
   
The Guest Award dialog box appears.

2. Click NEW.
   
The Edit Award Card dialog box appears.

3. Select the card from the drop-down listing.
   
   If no card is defined on the guest profile, the Guest Card Edit dialog box appears.

   Fill in the fields and click OK.

   The selected credit card and the member number are displayed.

4. Click in the AWARD TYPE field to display the available choices, and select the desired award.
   
The number of points awarded for this billing, as well as the total number of points accumulated toward this reward are displayed.

5. You may type in an award ID, as well as any text message you may wish to enter for your own purposes. These fields are not used by the system.

6. Click OK.
   
   You are returned to the Guest Awards dialog box, which displays the award program in the listing.

   When an award program has been assigned to a guest, the "Award" lamp appears on the Reservations screen.

**How to delete an award program:**

1. From the Reservation Options, click GUEST AWARDS.
   
The Guest Award dialog box appears.

2. Select the award program to be deleted.

3. Click DELETE.
   
   You are asked to confirm the delete.

4. Click YES.
   
   The selected award program is deleted.
How to edit an existing award program:
1. From the Reservation Options, click GUEST AWARDS.
   The Guest Award dialog box appears.
2. Select the award program to be edited.
3. Click EDIT.
   The Edit Award Card dialog box appears for the selected award.
   Edit the fields as described in step 3 through step 5 in To assign an award program (programs).
5. Click OK.
   You are returned to the Guest Awards dialog box, which displays the edited award in the listing.

Assigning the Award
When a guest has earned enough points to qualify for an award, the "Awarded" button on the Guest Award dialog box will be activated so that the award can then be authorized. However, the awarded button is not activated until the day after check-out, since the points are automatically calculated during Night Audit processing.

If a guest has earned the required points for a reward during the current stay, it is possible to manually calculate the points so that the guest can receive the award before he leaves the hotel.

How to authorize an award when the points have already been automatically calculated:
1. From the Reservation Options, click GUEST AWARDS.
   The Guest Award dialog box appears.
2. Select the award that has enough points to earn the award.
3. Click AWARDED.
   The selected award is credited to the guest, and the required points are subtracted from the current point balance, and the AWARDED button is no longer activated.

How to manually calculate award points and authorize an award:
1. From the Reservation Options, click GUEST AWARDS.
   The Guest Award dialog box appears.
2. Select the award that has enough points to earn the award.
3. Click CALCPOINTS.
   The current points are subtracted from the current point balance, and the selected award is credited to the guest.
Meal Plan

The Meal Plan option is used to set the meal plan schedule for a guest. This gives you greater flexibility, allowing you to override any pre-determined meal plans, and also change meal plans as necessary.

The ENABLEMEALPLAN parameter must be turned on.

By default, this parameter is turned off, in which case the meal plan can be used for forecasting purposes only, and cannot actually make any changes to the meal plan packages.

The meal plan option displays automatically any packages that are included in the rate code or attached manually on the reservation. Through the meal plan you can add or remove packages at any time. You will receive an error message if you try to attach a package with posting restrictions to a day that does not meet the restrictions; for example, attaching dinner to the departure date.

**Note:** The Meal Plan Forecast (procedure 10Day) prints the forecast report.

Setting a meal plan

**To add packages to the meal plan:**

1. From the Reservation Options, click MEAL PLAN.
   - The Variable Meal Plan dialog box appears.
   - The "Included Meals" column displays meals that are included in the rate plan.
   - The "Meals" column displays any manually added meals.
   - Note that the "Included Meals" column is not changed by this option.

2. Click in the "Meals" column for the desired date.

3. Click PACKAGES.
   - The Meal Packages dialog box appears.

4. Highlight a relevant meal package and click INCLUDE.
   - A check mark appears next to the selected package.

5. Repeat step 3 for all other relevant packages.

6. Click OK.
   - The Variable Meal Plan dialog box appears. The selected packages appear next to the dates the guests will be in the hotel.

7. Click SAVE.
   - The Variable Meal Plan dialog box is closed.

Removal of packages from the meal plan

You can remove only manually added packages from the meal plan. You cannot remove the packages that are attached to the rate code.

**Note:** The meal plan as a whole is removed, meaning that ALL manually attached packages are removed.
To remove the meal plan:
1. From the Reservation Options, click MEAL PLAN.
   The Variable Meal Plan dialog box appears.
   The "Included Meals" column displays meals that are included in the rate plan.
   The "Meals" column displays any manually added meals.
   If there are packages displayed in the "Meals" column, the Remove button is activated.
2. Click REMOVE.
   The manually attached meal plan elements are all removed.

Pro-Forma
The Pro-Forma option displays a pro-forma invoice, calculating the nights of stay for either an expected or checked in guest. The invoice may then be printed.

To generate a pro-forma invoice:
1. From the Reservation Options, click PRO-FORMA.
   The selected folio appears on the screen.
2. To print the folio, click PRINT.
3. If there is more than one billing window, you will be asked whether to display the folio for the next window.
   When all requested windows have been displayed, you are returned to the Reservations listing.
Waitlist

A reservation can be put on the Waitlist if the room type or rate is not available. When the room type or rate becomes available, the hotel can contact the guest and ask if they want the reservation. If the guest wants the reservation, the reservation is taken off the Waitlist and the reservation is accepted.

A reservation can be refused and put on the Regrets list. Once the reservation is on the Regrets list, the hotel no longer contacts the guest.

How to open the Waitlist dialog box:

1. From the main Suite 7 screen, click the Reservations icon.

   The Reservations toolbar appears to the right of the icons.

2. Click the Waitlist icon.

   The Waitlist dialog box appears.

The following actions are available from the waitlist listing:

- Change the order of placement of the Waitlist reservations:
- Change the date of the Waitlist dialog box:
- Display all Waitlist reservations:
- Display the Waitlist reservations that can be moved to and become confirmed reservations:
- View a Waitlist reservation:
- Locate a name on the Waitlist:
- Accept a Waitlist reservation:
- Cancel a Waitlist reservation:

Changing the order of placement of the Waitlist reservations

The Waitlist reservations are placed in order of priority. The first line represents the guest name who is called first when a room becomes available, and the last line represents the guest name that is called last when a room becomes available.

The order of the reservations on the Waitlist can be changed. For example, Abrams is the first guest name that is called when a room becomes available.

The hotel manager decided that the guest name Abrams should be placed fifth on the Waitlist. The order of placement is changed and Abrams is now fifth on the list to be called when a room becomes available.
How to change the order of placement of the reservations:
1. From the Waitlist dialog box, select the reservation that you want moved.
2. Click up, to move the reservation up one line, or click down, to move the reservation down one line.
3. Repeat clicking up or down until the reservation is moved to the desired line.
   The order that the reservations appear on the Waitlist dialog box is changed.

Changing the date of the Waitlist dialog box
You can view a different day’s Waitlist by changing the date in the Date field.

How to change the date:
1. On the Waitlist dialog box, type the start date in the Start Date field box.
   Or
2. Click the drop down arrow and select a date from the calendar.
   The Waitlist dialog box dates and information changes.

Displaying all Waitlist reservations
All the reservations on the Waitlist can be displayed, regardless of whether or not they can be moved to reservations.

   Note: Clicking the Can Move button toggles it to Display All. You must activate the Display All button to display all the reservations on the Waitlist.

How to display all the Waitlist reservations:
From the Waitlist dialog box, click Display All.
All the Waitlist reservations are displayed.

Displaying the Waitlist reservations that can be moved to reservations
The reservations displayed from the Waitlist that can be moved to reservations are based on availability.

   Note: Clicking the Can Move button toggles it to Display All. You must activate the Display All button to display all the reservations on the Waitlist.

How to display the Waitlist reservations that can be moved to reservations
From the Waitlist dialog box, click Can Move.
All the Waitlist reservations that can be moved to reservations are displayed.
Viewing a Waitlist reservation

You can view a Waitlist reservation from the Waitlist dialog box.

**Note:** You cannot make any changes to a Waitlist reservation.

**How to view a Waitlist reservation:**
1. From the Waitlist dialog box, select the reservation.
2. Click **VIEW**.
   The Waitlist Reservation screen appears. Note that all fields are display only and cannot be changed.
3. Click **CLOSE**.
   The Waitlist dialog box appears.

Locating a reservation on the Waitlist

You can locate a reservation on the Waitlist by typing in whole name or first letter of the guest's last name in the Name field box.

**How to locate a reservation on the waitlist:**
1. On the Waitlist dialog box, type the full name or first letter of the name in the Name field box.
2. Press **ENTER**.
   The Waitlist dialog box appears displaying the names which meet the entered criteria.

Accepting a Waitlist reservation

From the Waitlist dialog box you can accept a Waitlist reservation.

**To accept a Waitlist reservation:**
1. From the Waitlist dialog box, select the reservation.
2. Click **ACCEPT RESERV.**
   A transfer confirmation message appears.
3. Click **YES**.
   The reservation is accepted and taken off the Waitlist. The reservation no longer appears on the Waitlist dialog box.

Cancelling a Waitlist reservation

A Waitlist reservation can be cancelled and removed from the Waitlist.

**To cancel a Waitlist reservation:**
1. From the Waitlist dialog box, select the reservation.
2. Click **CANCEL**.
   The Cancel waitlist reservation dialog box appears.
3. Click the drop down arrow and select a reason from the Reasons list.
4. Click **YES**.
The reservation is cancelled and removed from the Waitlist. The reservation no longer appears on the Waitlist dialog box.

**Regrets**

**Opening the Regrets dialog box**

A reservation is refused and put on the Regrets list. Once the reservation is on the Regrets list, the hotel no longer contacts the guest.

---

**Note:** When the Regrets parameter is set to ON, the Regrets button is activated and the Turnaways button is deactivated.

---

**How to open the Regrets listing:**

1. From the main Suite 7 screen, click the Reservations icon.

   The Reservations toolbar appears to the right of the icons.

2. Click the Waitlist icon.

   The Waitlist dialog box appears.

3. Click the REGRETS radio button.

   The Regrets dialog box appears.

   The Regrets dialog box functions the same way as the Waitlist dialog box.

**The following actions are available from the regrets listing:**

- Change the order of the regrets reservations:
- Change the date of the regrets listing:
- Display all regret list reservations:
- Display the regret list reservations that can be moved to and become confirmed reservations:
- View a regret list reservation:
- Locate a name on the regret list:
- Accept a regret list reservation:
- Cancel a regret list reservation:
Groups

In this chapter, you will learn to create and update group reservations. There are two methods for handling group reservations:

- **Standard Group Module**: This module is specifically designed to manage reservations with various similar needs, such as a group with the same arrival date, room type etc.

- **Blocks (Advanced Group Module)**: A more flexible and powerful system, designed for larger and more complex groups.

If your hotel works with any of the following types of groups, we recommend using the Advanced Group Module (Blocks).

- Travel agent allotments that you wish to track through Suite 7.
- Convention groups where group members call and pick up their reservations individually.
- Group bookings for which you need a high degree of control over the number of rooms blocked for the group, the number of rooms picked up and other group statistics and reports.
- Group bookings with staggered arrivals and departures, different numbers of rooms booked on each day, or rates which change during the group booking.

**The Main Groups Screen**

Both standard groups and blocks are accessed from the main groups screen. The following table explains the sections of the screen, and refers you to the page in this manual where each is described, if applicable.

<table>
<thead>
<tr>
<th>This section</th>
<th>Does this</th>
<th>Is described here</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listing at top of screen.</td>
<td>Displays a listing of all existing blocks. Standard groups are not listed. To select the block with which you wish to work, highlight it in this display.</td>
<td></td>
</tr>
<tr>
<td>Display area under the listing on the left.</td>
<td>Displays the information entered using the Info option.</td>
<td>Info.</td>
</tr>
<tr>
<td>Six search fields under the listing on the right.</td>
<td>Allows you to search for the block header(s) that meet specified search criteria. The block header(s) found will be displayed above in the listing.</td>
<td>Block Header Search Criteria</td>
</tr>
<tr>
<td>Status radio buttons</td>
<td>Allows you to display only blocks with the selected status.</td>
<td>Block Header Search Criteria</td>
</tr>
</tbody>
</table>
This section | Does this | Is described here
--- | --- | ---
History | Displays only blocks whose departure date is less than the system date, i.e. blocks that have already been moved to the history file. | Group Block Maintenance
Group Block Maintenance | Displays the block header for the block highlighted in the listing above. | Group Block Maintenance
Group Detail Maintenance | Displays the reservation list for the block highlighted in the listing above. | Group Detail Maintenance
Cutoff All Blocks | Releases available rooms from all blocks for all dates up to and including today. | Block Components
New | Displays the New Block dialog box for the creation of a new block. | Block Components
Close | Exits from the Groups module and returns you to the main Suite 7 screen. | Block Components

Standard Groups

The Standard Group module is generally used to make reservations for five or more guests who have some features in common - e.g. they are all from the same company and are arriving on approximately the same dates, or they are all members of an organized tour, etc.

* A standard group consists of two primary elements:
  - The Group Master or Pay Master (PM) Reservation: Contains default values for most of the fields on the reservation screen. Also creates a PM room to be used for group billing. The group master may be attached to up to four profiles:
    - Group Profile: Contains name, address, phone number of group coordinator, as well as other group information. Required for all groups.
    - Company/Travel Agent/Source Profile: Attach one of these profiles if you wish to maintain statistics for the organization that generated the group; you can then search for group members using the profile name as well as the block name.
    - Individual Reservations: An individual reservation must be made for each guest who is part of the group. These are each linked to an individual profile just like any regular reservation. There are two ways to make an individual reservation within a standard group; using the rooming list, or using the Split All option. These are described below.

The first step when using the standard group module is to create the group reservation, which consists of the group profile and the group, or pay master.

To work with an existing standard group, you must first display the Group Reservation List for the group. Options such as splitting, check-in, cancellation, and all the group options are available from the Group Reservation List.
Individual reservations may be entered using the rooming list in Group Options or by using the Split All option; the method you select for each group will usually be determined by how you will receive the reservation information for each guest. In some cases, a list of guests is given to the user by the contact person reserving the group. Alternatively, individual reservations may be made separately by each guest.

In general, if you have a list of guests, you will find it more convenient to use the rooming list. (See Rooming List). If each guest will make his own reservation separately, you will probably want to split the group reservation (see Split All). Then the individual reservations can be made one at a time as each guest contacts the hotel.

You may also find times that you will want to combine the two methods; you may have an initial rooming list for some guests, but split rest of group.

**How to create a group reservation using the Standard Group module:**

1. From the main Suite 7 screen, click the Reservations icon.

   The Reservations toolbar appears to the right of the icons.

2. Click the Groups icon, or press CTRL + G.

   The Groups dialog box appears.

3. Click STANDARD GROUP MODULE at the bottom left corner of the dialog box.

   The Standard Groups dialog box appears.

4. Type the name you have chosen for the new group that you are creating in the Groups field.

5. Click OK.

   The Profile Search screen appears, with the name of the new group displayed in the search field.

6. Click NEW.

   A Group Profile screen appears with the name of the group in the Group field.

7. Fill in the rest of the necessary information. Most of the main dialog box is self-explanatory. Some of the main fields are briefly explained in the Group Profile Fields table below. See also Profiles for more information.

8. Click SAVE.

   The new profile is saved. All group profiles have record type **G**, which is used to distinguish the information from other profile types - guest, travel agent, company and source.

9. Click CLOSE.

   You are returned to the Standard Groups dialog box. The name of the new group being created is displayed in the Group field.

10. Click OK.
You are asked whether you want to create a new reservation.

11. Click Yes.

The New Reservation screen appears with the group name you have chosen displayed in the Guest Name field in the Profile section at the top of the dialog box.

12. Fill in all necessary information.

The fields are mostly the same as for an individual reservation with the exceptions listed in the Group Reservation Fields table below. See also Reservations and Reservations Options.

Any information specified in the group reservation will automatically be copied to every individual reservation. Each individual reservation may be edited as necessary.

13. Click OK.

The system assigns a reservation number to the group reservation.

14. Click OK.

The Group Reservation List dialog box is displayed. The top portion displays the group master just created. The bottom section, which is now empty, will display the individual reservations as they are made, or split.

**Group Profile Fields**

<table>
<thead>
<tr>
<th>Fill in this field</th>
<th>With this information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Name</td>
<td>Name of the group as it will appear on the block header and pay master reservation.</td>
</tr>
<tr>
<td>Language</td>
<td>Language to be used for the folio, confirmation letters, etc.</td>
</tr>
<tr>
<td>Comments</td>
<td>Relatively brief, (up to 70 characters of text), summary of any special information you need to record on the group profile.</td>
</tr>
<tr>
<td>Remarks</td>
<td>Unlimited amount of special information about the group.</td>
</tr>
<tr>
<td>Contact Information</td>
<td>Name, title, and phone numbers of the specific contact person for this group.</td>
</tr>
<tr>
<td>Acct Contact</td>
<td>Address for financial correspondence for the group; for example &quot;Attention Accounts Department&quot;.</td>
</tr>
<tr>
<td>Contract No Received</td>
<td>Number of the contract.</td>
</tr>
<tr>
<td>Rate Code</td>
<td>Date the contract was received.</td>
</tr>
</tbody>
</table>

**Group Reservation Fields**

<table>
<thead>
<tr>
<th>Fill in this field</th>
<th>With this information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrival</td>
<td>Date the first group guest will arrive.</td>
</tr>
<tr>
<td>Departure</td>
<td>Date the last group guest will depart.</td>
</tr>
<tr>
<td>Adults</td>
<td>Number of adults per room.</td>
</tr>
</tbody>
</table>
Fill in this field  With this information

#Rooms  Number of rooms reserved for this group.
RateCode  Rate code assigned to the group. If specified, it will automatically be assigned to all reservations in the group.
Rate  Rate associated with this group. If specified, it will automatically be assigned to all reservations in the group.
Room Type  Room type to be reserved for all members of the group. After all the individual reservations have been made, the room type will be changed to "PM".
Payment  Payment method for the group. If not specified, payment method will be requested at check-in for each guest individually.

Group Reservation List

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Group Name</td>
</tr>
<tr>
<td>First</td>
<td>(Always blank.)</td>
</tr>
<tr>
<td>Arrival</td>
<td>Date the first group guest will arrive.</td>
</tr>
<tr>
<td>Departure</td>
<td>Date the last group guest will depart</td>
</tr>
<tr>
<td>Persons</td>
<td>Number of adults per room. (Changes to &quot;0&quot; after all individual reservations are made.)</td>
</tr>
<tr>
<td>Rooms</td>
<td>Number of rooms left for which individual reservations have not yet been made. (Changes to &quot;1&quot; after all individual reservations are made.)</td>
</tr>
<tr>
<td>Room Type</td>
<td>Room type to be reserved for all members of the group. (Changes to &quot;PM&quot; after all individual reservations are made.)</td>
</tr>
<tr>
<td>Room</td>
<td>PM room number.</td>
</tr>
<tr>
<td>Rate</td>
<td>Rate assigned to this group.</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of the group.</td>
</tr>
</tbody>
</table>

How to find the Group Reservation List for an existing standard group reservation:

1. From the main Suite 7 screen, click the Reservations icon.
   The Reservations toolbar appears to the right of the icons.
2. Click the Groups icon, or press CTRL + G.
   The Groups dialog box appears.
3. Click Standard Group Module at the bottom left corner of the dialog box.
   The Standard Groups dialog box appears.
4. Type in all or part of the name of the group in the Groups field, OR click on the Groups field to display a listing of all existing groups.
5. Click OK.
   The Profile Search screen appears with names that match the search criteria you specified, or a listing of all existing group profiles.
6. If more than one profile is displayed, type all or part of the profile name in the search field, and press TAB or ENTER. Only the names that match the search criteria you specified are now displayed.

7. Highlight the name of the group you want to work with.

8. Click OK. You are returned to the Standard Groups dialog box. The name of the selected group is displayed in the Group field.

9. Click OK. The Group Reservation List dialog box is displayed. The top portion displays the group master of the selected group. The bottom section displays the existing individual reservations.

10. You may select a reservation to work with.

11. When you are finished, click CLOSE. You are returned to the main Reservations module screen.

### Group Reservations List Options

<table>
<thead>
<tr>
<th>Click this option</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Display the reservation form of the selected guest for editing.</td>
</tr>
<tr>
<td>Check In/Billing</td>
<td>Check in the selected guest.</td>
</tr>
<tr>
<td></td>
<td>If the guest has been checked in, this button toggles to Billing to connect</td>
</tr>
<tr>
<td></td>
<td>you to the guest's bill in Cashiering.</td>
</tr>
<tr>
<td>Profile</td>
<td>Display the Profile of the selected guest.</td>
</tr>
<tr>
<td>Cancel/ Reactivate/ Cancel CI</td>
<td>Toggle between cancelling and reactivating the selected reservation (group</td>
</tr>
<tr>
<td></td>
<td>or individual).</td>
</tr>
<tr>
<td></td>
<td>Also can cancel the entire group, if the pay master reservation is selected.</td>
</tr>
<tr>
<td></td>
<td>If the guest is checked in, this button cancels the check in (Cancel CI).</td>
</tr>
<tr>
<td>Options</td>
<td>Display the Options screen. (See Reservations Options.)</td>
</tr>
<tr>
<td>Group Op</td>
<td>Display the Group Options screen. (See Group Options.)</td>
</tr>
<tr>
<td>Split All</td>
<td>Split the entire group reservation into individual reservations.</td>
</tr>
<tr>
<td>Search</td>
<td>Find selected individual reservations within a group.</td>
</tr>
<tr>
<td>Close</td>
<td>Close the Group Reservation List.</td>
</tr>
</tbody>
</table>

### Check-In/Billing

Use CHECK IN to check in an individual reservation from a group. If the guest is already checked in, this button toggles to BILLING to display the billing for the guest.
How to check in an individual reservation from a group:
1. Select the reservation you wish to check in.
2. Click CHECK IN.
   If there is any question about the status of the room, etc., the system will ask whether to proceed with the check in. Click OK to continue.
   If the room is shared with other guests, the system will ask whether to check in the other guests at the same time. Click Yes or No to continue.
   If there are any messages for the guest, they will be displayed. Click CLOSE to continue.
   If you print key cards, the system will ask how many to print. Click the appropriate button to continue.
   If there are no special situations, the system simply informs you that the guest is checked in.
3. Click OK.
   You are returned to the Group Reservation List; the status of the selected reservation is now "Checked In".

How to display the bill of a guest from a standard group:
1. Select the checked in guest whose bill you wish to display.
2. Click BILLING.
   The system asks for the cashier number and password.
3. Type in your cashier number and password.
4. Click OK.
   The billing information for the selected guest is displayed. (See the Suite 7 Cashiering Manual).
5. Click CLOSE.
   You are returned to the Group Reservation List.

Cancel/Reactivate/Cancel CI
When you delete a group, the group master and all individual reservations are deleted entirely from the system, leaving no record.
Cancellation, on the other hand, leaves the reservations in the system, but changes the status to "cancelled".

Use CANCEL to cancel an entire group, the group master, or an individual reservation from a group. If the reservation has been cancelled, this button toggles to REACTIVATE the reservation. If the guest has been checked in, the button toggles to CANCEL CI, which cancels the check in, but not the reservation.

How to cancel an entire group:
1. Select the group master.
2. Click CANCEL.
   The Cancel Group dialog box appears.
3. Indicate that the entire group is to be cancelled.
4. Click OK.
   The Cancel Reservation dialog box appears.
5. Click on the Reasons field
   The reasons for cancellation are displayed.
6. Select the applicable reason for this cancellation.
7. Click Yes.
   You are returned to the Group Reservation List; the status of the group master is now "Cancelled”. However, the status of the individual reservations remain in the system; with a status of "Cancelled".

**How to cancel a group master:**
1. Select the group master.
2. Click Cancel.
   The Cancel Group dialog box appears.
3. Indicate that only the group master is to be cancelled.
4. Click OK.
   The Cancel Reservation dialog box appears.
5. Click on the Reasons field.
   The reasons for cancellation are displayed.
6. Select the applicable reason for this cancellation.
7. Click Yes.
   You are returned to the Group Reservation List; the status of the group master is now "Cancelled”. However, the status of the individual reservations is unchanged.

**How to cancel an individual reservation from a group:**
1. Display the Group Reservation List for the group. (See To find the Group Reservation List for an existing standard group reservation).
2. Select the reservation you wish to cancel.
3. Click Cancel.
   The Cancel Reservation dialog box appears.
4. Click on the Reasons field.
   The reasons for cancellation are displayed.
5. Select the applicable reason for this cancellation.
6. Click Yes.
   You are returned to the Group Reservation List; the status of the selected reservation is now "Cancelled”. The status of all other reservations is unchanged.

**How to cancel a checked in guest from a standard group:**
1. Display the Group Reservation List for the group. (See To find the Group Reservation List for an existing standard group reservation).
2. Select the reservation you wish to cancel the check-in.
3. Click Cancel CI.
   The system asks for confirmation.
4. Click Yes.
   The system asks whether to change the room status to Touch Up or Dirty.
5. Indicate whether the new room status should be Touch Up.
6. Click Yes to change to Touch up or Dirty, No to leave room status unchanged.
7. The system asks whether to block the room, that is, to keep it assigned to this reservation.
8. Click the appropriate choice.
   You are returned to the Group Reservation List; the status of the selected reservation is now "Expected".

**How to reactivate a cancelled reservation from a group:**
1. Display the Group Reservation List for the group. (See To find the Group Reservation List for an existing standard group reservation).
2. Select the reservation you wish to reactivate.
3. Click REACTIVATE.
   The system asks for confirmation of the reactivate request.
4. Click Yes.
   The reservation form is displayed.
5. Make any changes necessary to the reservation.
6. Click OK.
   You are returned to the Group Reservation List; the status of the selected reservation is now "Expected". The status of all other reservations is unchanged.
   You can only reactivate one reservation at a time; if an entire group has been cancelled, the group master and each individual reservation must be reactivated separately.

**Split All**
Use SPLIT ALL to split the group, that is, to automatically create the required number of individual reservations from the master. These individual reservations are "place holders" in that they are not yet assigned to a specific guest. (Although they are actual reservations.)

They are all identical, using the group name as the first name, and the group name plus a sequence number as the last name. Each individual "place holder" reservation must be edited separately when the actual guest name is received.

Once the group has been split, specific guest names are assigned to the individual reservations as information on each guest is received.

**How to enter a group rooming list using the Split All option:**
1. Display the Group Reservation List for the group. (See To find the Group Reservation List for an existing standard group reservation).
2. Click SPLIT ALL.
   The group reservation is automatically split into the required number of individual reservations, displayed in the lower portion of the Group Reservation List.
   The group master now has room type = "PM" (Post Master) and number of rooms = 1.
   If a room is to be shared by two or more people, see Sharing.
When you select to display All, all the individual reservations that have been made are listed, and may be edited.

**How to assign names in a group rooming list:**

1. Display the Group Reservation List for the group. (See To find the Group Reservation List for an existing standard group reservation).

2. Select the first "place holder" reservation, that is, a reservation listing that displays the group name in the Name field, rather than the name of an actual guest.

3. Click **PROFILE**.

   The Individual Profile screen appears, displaying the name of the selected reservation in the Last Name and First Name fields. Most of the rest of the fields are blank.

4. If a profile already exists for this guest, find it and link it to this reservation. If no profile exists, type in the name of the guest, as well as any other information in the appropriate fields. (See Profiles).

5. Click **SAVE**.

   The profile is saved.

6. Click **CLOSE**.

   You are returned to the Group Reservation List dialog box. The individual reservation now appears (in alphabetical order) under the name of the actual guest.

7. Click **EDIT**.

   The Reservation dialog box for the selected guest appears.

8. Edit any information in the reservation that needs to be changed for this guest.

9. Click **OK**.

   The system asks whether this change applies to this guest only or to all guests in this group.

10. Select the appropriate choice.

11. Click **OK**.

12. The Group Reservation List displays the updated information in the individual reservation.

13. Click **CLOSE**.

   You are returned to the Groups dialog box.

14. Click **CLOSE**.

   You are returned to the main Suite 7 screen.

**Search**

Use **SEARCH** to find selected individual reservations within a group. You may specify the search criteria and the order in which the reservations are to be displayed.

**How to search for selected reservations within a group:**

1. Display the Group Reservation List for the group. (See To find the Group Reservation List for an existing standard group reservation).
2. Click **Search**.

The Group Reservation Search dialog box appears.

3. Specify the search criteria for the guests you want to find; you may search for a name, arrival or departure on a specific date, arrival or departure within a range of dates, or any combination of the above. Indicate also whether only reservations of a certain status such as check-in or cancelled are to be displayed. You may also select whether the listing is to be sorted in order by arrival date, room number or last name.

4. Click **Search**.

5. Only the individual reservations from the group that meet the specified search criteria are displayed in the Group Reservation List.

**Group Options**

Click the **Group Options** button at the bottom of the Group Reservation List to display the available group functions.

**Group Options**

<table>
<thead>
<tr>
<th>This Group option</th>
<th>Does this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rooming list</td>
<td>Makes individual group reservations, assigns shared rooms.</td>
</tr>
<tr>
<td>Check In Group</td>
<td>Automatically checks in all guests in a group at one time.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the group from the system.</td>
</tr>
<tr>
<td>Room Assign</td>
<td>Automatically assigns room numbers to individual reservations in a group.</td>
</tr>
<tr>
<td>Room Type Assign</td>
<td>Automatically assigns specific room types to individual reservations that have been made using generic room types.</td>
</tr>
<tr>
<td>New Postmaster</td>
<td>Automatically copies the postmaster - makes an additional postmaster</td>
</tr>
<tr>
<td>Statistic</td>
<td>Displays summary statistics for the group.</td>
</tr>
<tr>
<td>Room Status</td>
<td>Displays the status of the rooms reserved for the group.</td>
</tr>
<tr>
<td>Print Keys</td>
<td>Automatically prints keys for an entire group</td>
</tr>
</tbody>
</table>

**Rooming List**

Use Rooming List to make individual reservations for a group and to assign shared rooms.

You may find it convenient to create a more streamlined Rooming List template that is tailor-made to your own needs. You can delete and change the width and order of columns, and then save the template for future use with any group.

**How to enter a group rooming list:**

1. Display the Group Reservation List for the group. (See To find the Group Reservation List for an existing standard group reservation). (To display the Reservation list for a block, see To access the Group Reservation List).

2. Select the group master.

3. Click **Group Options**.
The Group Options dialog box appears.

4. Click ROOMING LIST.

The Group Rooming List dialog box appears. The group or block name appears in the Name field; all other information is copied from the group master or post master.

The options in the Rooming List are explained in the Rooming List Functions table below.

5. Type in the first and last name of the guest, as well as any other necessary information. The fields are all self-explanatory. Use the mouse or the press TAB to move from field to field. You may click on the following fields to display a drop-down box rather than typing: Title, Arrival, Departure, Room (displays the Room Search dialog box.), Specials and Packages.

6. Press ENTER to display a new line (reservation) which is copy of the original selected reservation. (or arrow down)

7. Repeat step 5 and step 6 until the entire rooming list has been entered.

8. Click SAVE.

The individual group reservations that have been created are saved.

9. Click CLOSE.

You are returned to the Group Reservation List. The new individual reservations that have just been created appear in the bottom portion of the display.

**Rooming List Functions**

<table>
<thead>
<tr>
<th>Clicking this option</th>
<th>Does this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template</td>
<td>Displays the available rooming list templates (For instructions on how to create your own template, see To create or edit a Rooming List template.)</td>
</tr>
<tr>
<td>Check Guest Profile</td>
<td>Indicates whether to check to see if a profile already exists for each guest as the listings are created.</td>
</tr>
<tr>
<td>Creation</td>
<td>Sorts the listing in order of creation date.</td>
</tr>
<tr>
<td>Name</td>
<td>Sorts the listing in order of last name.</td>
</tr>
<tr>
<td>Arrival</td>
<td>Sorts the listing in order of arrival date.</td>
</tr>
<tr>
<td>Room</td>
<td>Sorts the listing in order of room number.</td>
</tr>
<tr>
<td>New</td>
<td>Displays only new reservations being made.</td>
</tr>
<tr>
<td>All</td>
<td>Displays all existing reservations in the group.</td>
</tr>
<tr>
<td>Zero</td>
<td>Sets the payment method for a shared room to Zero: first guest pays the entire price, others pay zero.</td>
</tr>
<tr>
<td>Full</td>
<td>Sets the payment method for a shared room to Full: each guest pays the full rate.</td>
</tr>
<tr>
<td>Even</td>
<td>Sets the payment method for a shared room to Even: The rate is divided equally between all the sharing guests.</td>
</tr>
<tr>
<td>Share</td>
<td>Sets shared rooms. (See Sharing.)</td>
</tr>
<tr>
<td>Traces</td>
<td>Displays the Traces form for the selected guest. (See Reservations Options.)</td>
</tr>
<tr>
<td><strong>Clicking this option</strong></td>
<td><strong>Does this</strong></td>
</tr>
<tr>
<td>---------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Messages</td>
<td>Displays the Messages form for the selected guest. (See Reservations Options)</td>
</tr>
<tr>
<td>Profile</td>
<td>Displays the Profile of the selected guest. (See Profiles.)</td>
</tr>
<tr>
<td>Reserve</td>
<td>Displays the reservation form for the selected guest.</td>
</tr>
<tr>
<td>Grid</td>
<td>Displays the rooming grid for the block. (Not activated in the Standard Group module.)</td>
</tr>
<tr>
<td>Print</td>
<td>Prints a hard copy of the rooming list.</td>
</tr>
<tr>
<td>Undo</td>
<td>Deletes the last line that was created, if it has not already been saved.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves the rooming list.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the Group Rooming List dialog box.</td>
</tr>
</tbody>
</table>

**How to create or edit a Rooming List template:**

1. Display the Group Reservation List for any group. (See To find the Group Reservation List for an existing standard group reservation, or To access the Group Reservation List.)
2. Click **GROUP OPTIONS**.
3. Select the group master.
   The Group Options dialog box appears.
4. Click **ROOMING LIST**.
   The Group Rooming List dialog box appears.
5. Click on the Template field.
   A listbox appears, displaying all existing templates.
6. Select the template to be edited, or one to serve as the basis for a new template.
   The selected Rooming List is displayed in conformity with the selected template.
7. Edit the template as follows:
   **To delete a column:**
   a. Position the cursor on the column and right-click.
   b. The template options are displayed.
   c. **Click DELETE COLUMN**.
   The column is deleted.
   **To move a column:**
   a. Position the cursor on the column name and hold down the left mouse button.
   b. Drag the column to the desired position.
   c. Release the mouse button.
   The column is in the new position.
   **To change column width:**
a. Position the cursor on the right-hand boundary of the column and hold down the left mouse button.
b. Move the column boundary to create desired width.

**To delete a template:**

a. Right-click anywhere in the Rooming List.
b. The template options are displayed.
c. Click DELETE CURRENT TEMPLATE.
The entire template is deleted.

**To restore a column:**

a. Right-click anywhere in the Rooming List.
b. The template options are displayed.
c. Highlight RESTORE COLUMN.
A listing of deleted columns appears.
d. Click on the desired column name.
The column is restored.

8. When the template is finished, right-click anywhere in the Rooming List.
The template options are displayed.

9. Click SAVE TABLE TEMPLATE.
The Save Table Template dialog box is displayed.

10. Type in the name of the template and click OK.
If you type in a new name, a new template will be created and the original template will be unchanged. If you type in the same name, the system will ask for confirmation before overwriting.

11. Click Yes.

**How to print the rooming list:**

1. Display the Group Reservation List for the group. (See To find the Group Reservation List for an existing standard group reservation or to find the Reservation List for a block, see To access the Group Reservation List.)
2. Select the group master
3. Click GROUP OPTIONS
   The Group Options dialog box appears.
4. Click ROOMING LIST.
The Group Rooming List dialog box appears.
5. Select the template and sort order.
6. When the Rooming List is displayed as you want it to be printed, right-click anywhere in the Rooming List.
The template options are displayed.
7. Click PRINT.
The Grid Print dialog box appears.
8. Click PRINT to print in the standard format, or ADVANCE to customize the print format and parameters. (See Printing with printing options for an explanation of Advance Print.)

**Rooming List Functions**

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</tr>
<tr>
<td>Arrival</td>
<td>Sorts the listing in order of arrival date.</td>
</tr>
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<td>Sets the payment method for a shared room to Even: The rate is divided equally between all the sharing guests.</td>
</tr>
<tr>
<td>Share</td>
<td>Sets shared rooms. (See Sharing.)</td>
</tr>
<tr>
<td>Traces</td>
<td>Displays the Traces form for the selected guest. (See Reservations Options.)</td>
</tr>
<tr>
<td>Messages</td>
<td>Displays the Messages form for the selected guest. (See Reservations Options)</td>
</tr>
<tr>
<td>Profile</td>
<td>Displays the Profile of the selected guest. (See Profiles.)</td>
</tr>
<tr>
<td>Reserv</td>
<td>Displays the reservation form for the selected guest.</td>
</tr>
<tr>
<td>Grid</td>
<td>Displays the rooming grid for the block. (Not activated in the Standard Group module.)</td>
</tr>
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</tr>
<tr>
<td>Save</td>
<td>Saves the rooming list.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the Group Rooming List dialog box.</td>
</tr>
</tbody>
</table>

**Check-In Group**

Use CHECK IN GROUP to automatically check in all guests in a group at one time. You must first make sure that they have all been assigned room numbers.
**How to check in a group:**

1. **Click CHECK IN GROUP.**
   
   The Check In Group dialog box appears.

2. **Indicate whether to check in rooms that are not inspected, and whether to print keys and assign DID numbers for each guest.**

3. **Click START.**
   
   All guests in the group are checked in, according to the specified criteria.

   If no payment method was defined for the whole group in the group reservation, the system asks for the method of payment for each guest (unless a method of payment was defined on the individual reservation.)
   
   a. **Click on the Payment field to display the available choices.**
   
   b. **Select the method of payment.**
   
   c. **Type in the credit card number and expiration date, if applicable.**
   
   d. **Click OK to continue.**

   If you print key cards, the system will ask how many to print for each guest. 
   
   Click the appropriate button to continue.

   The system informs you how many guests have been successfully checked in.

4. **Click OK.**
   
   A summary of the check in results appears in the lower portion of the dialog box.

5. **Click CLOSE.**

**Delete**

Use **DELETE** to delete a group, the group master and all individual reservations entirely from the system, leaving no record.

1. **Click DELETE.**
   
   The system asks for confirmation.

2. **Click YES.**
   
   The entire group is deleted, including the group master and all individual reservations.

**Room Assign**

Use **ROOM ASSIGN** to automatically assign room numbers to individual reservations, including shared rooms, in a group.

**How to automatically assign room numbers to a group:**

1. **Click ROOM ASSIGN.**
   
   The Automatic Room Block dialog box appears.

2. **Define criteria for blocking rooms.**

3. **Click BLOCK.**
   
   Room numbers are assigned to all reservations in the group that do not have room assignments; and a PM account number to the group master. The system informs you how many rooms have been successfully assigned.

4. **Click OK.**
A listing of the room assignments appears in the Status portion of the dialog box.

5. Click Close.

You are returned to the Rooming List, which now displays room numbers in the Room column.

**Automatic Room Block dialog box**

<table>
<thead>
<tr>
<th>This field:</th>
<th>Assigns rooms:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrival Date</td>
<td>To guests arriving on this date.</td>
</tr>
<tr>
<td>Features</td>
<td>Only with the selected features.</td>
</tr>
<tr>
<td>Override Guest Features</td>
<td>Even if they don't have the features selected on the individual guest profile.</td>
</tr>
<tr>
<td>Include Groups</td>
<td>Not activated in the groups module.</td>
</tr>
<tr>
<td>Departing Rooms</td>
<td>Even if they are departing rooms.</td>
</tr>
<tr>
<td>Inspected Rooms Only</td>
<td>Only if they have been inspected.</td>
</tr>
<tr>
<td>All Group Dates</td>
<td>For the entire range of dates that members of the group will be staying.</td>
</tr>
<tr>
<td>Start From Room</td>
<td>Starting from the indicated room number.</td>
</tr>
<tr>
<td>Limit to Floor</td>
<td>Only on the selected floor.</td>
</tr>
<tr>
<td>Group/Block</td>
<td>To this group. (Group Name; information only)</td>
</tr>
</tbody>
</table>

**Note:** If you have not yet closed the Automatic Room Block dialog box, you can automatically unassign the room numbers that have been blocked.

**How to automatically unassign blocked room numbers:**

1. Click Unblock.
   
   The system asks for confirmation.

2. Click Yes.
   
   The rooms are unblocked.
   
   A listing of the unassigned room appears in the Status portion of the dialog box.

3. Click Close.

4. You are returned to the Rooming List.
**Room Type Assign**

Use **Room Type Assign** to automatically assign specific room types to individual reservations that have been made using generic room types:

1. Click **Room Type Assign**.
   
   The Automatic Room Type Assignment dialog box appears.

2. Type in the arrival date for which the room types are to be assigned, or click on the field and select the date from the calendar that appears.

3. Click **OK**.
   
   Specific room types are assigned to all individual reservations in the group arriving on the selected date, replacing the generic room type. A summary of the room type assignments appears in the dialog box.

4. Click **Close**.
   
   You are returned to the Rooming List, which now displays a specific room type for each reservation in the Room Type column.

**New Postmaster**

Use **New Postmaster** to copy the postmaster. This is useful for creating subgroups within a group. For instance, you may have a block in which various groups are arriving on different dates; or a standard group with two room types.

**How to use New Postmaster:**

1. Click **New Postmaster**.
   
   The system asks for confirmation.

2. Click **OK**.
   
   The system tells you that is creating the new postmaster.

3. Click **OK**.
   
   The system creates a new group master, which appears in the Reservation List.

4. Click **Edit** to bring up the reservation form for the new group master.

5. Edit the field(s) of the new postmaster that are necessary

**Statistic**

Use **Statistic** to display summary statistics for the group:

1. Click **Statistic**.
   
   The Group Statistic dialog box appears.

   The activity for the group is displayed as the number of rooms and persons per room type per day per day and total. This function is for information purposes only and cannot be edited.

2. Click **Close**.
Room Status

Use ROOM STATUS to display the status of the rooms reserved for the group:

1. Click ROOM STATUS.
   
The Group Room Status dialog box appears.
   
The status of each room assigned to an individual reservation within this group, with arrival date of today, is displayed. If no guest from the group is arriving today, a message to that effect appears. This function is for information purposes only and cannot be edited.

2. Click Close.

Print Keys

To automatically print keys for an entire group:

Click PRINT KEYS.

Key cards are printed for all the guests in the group.

Sharing

When more than one reservation is made for one room, the room is "shared". Shared rooms are designated from the Rooming List. A shared room may be created when the reservations are entered into the rooming list, or from existing reservations.

How to create a shared room while entering reservations in the rooming list:

1. Display the Reservation List for the group or block.

2. Click GROUP OPTIONS.
   
The Group Options are displayed.

3. Click ROOMING LIST.
   
The Rooming list appears.

4. If this is the first share that is being created, select the method of sharing the price of the room to be used for the entire group. This may be adjusted later for specific rooms, if desired.
   
   - Zero: The first guest pays the full price; the rate for all sharing guests is zero.
   - Full: Each guest pays the rate for a single person in the room.
   - Even: The rate is divided evenly between the guests sharing the room.

5. Enter the first of the reservations that will be sharing the room.

6. Click SHARE and press ENTER or the down arrow to display the next line.
   
The guest name and room rate appear in the Share section.

7. Enter the next reservation sharing the same room.

8. Click ADD SHARE.
   
The name of the next guest sharing the room appears in the Share field. If a room number was assigned to the first reservation, it appears in the Room column of the second reservation. If no room number had been assigned, the list displays "S/n" (where "n" is the sequence number of the share) in the Room column of all reservations sharing the room.
9. If there are no more sharing guests, click SHARE AGAIN TO EXIT THE SHARING FUNCTION.
   If more than two people will be sharing the same room, repeat step 5, through step 8.
10. If you want to set up a special price arrangement, click SHARE PRICE.
    The Share Reservation dialog box appears. Type in the rates, or select Full, Zero, or Even, as explained in step 4.
11. Repeat step 5 through step 10 for each of the shared rooms.
12. Click SAVE.
13. Click CLOSE.

How to create a shared room for existing reservations:
1. Display the Reservation List for the group or block.
2. Click GROUP OPTIONS.
   The Group Options are displayed.
3. Click ROOMING LIST.
   The Rooming list appears.
4. Set the display to ALL to see all the existing reservations.
5. If this is the first share that is being created, select the method of sharing the price of the room to be used for the entire group. This may be adjusted later for specific rooms, if desired.
   Zero: The first guest pays the full price; the rate for all sharing guests is zero.
   Full: Each guest pays the rate for a single person in the room.
   Even: The rate is divided evenly between the guests sharing the room.
6. Highlight the first of the reservations that will be sharing the room.
7. Click SHARE.
   The guest name and room rate appear in the Share section.
8. Select the next reservation sharing the same room.
9. Click ADD SHARE.
   The name of the next guest sharing the room appears in the Share field, and the room number of the first reservation also appears in the room column of the second reservation. If no room number had been assigned to the first reservation, the list displays "S/n" (where "n" is the sequence number of the share) in the Room column of all reservation s sharing the room.
10. If there are no more sharing guests, click SHARE AGAIN TO EXIT THE SHARING FUNCTION.
    If more than two people will be sharing the same room, repeat steps step 8 and step 9.
11. If you wish to set up a special price arrangement, see To create a shared room while entering reservations in the rooming list.
12. Repeat step 6 through step 11 until all shared rooms are completed.
13. Click SAVE.
14. Click CLOSE.
**How to break a shared room:**

1. Display the Rooming List for the group.
2. Select one of the guests in the room that you want to break.
   The shared rooms are displayed in the Share section.
3. Click **Share Price**.
   The Share Reservation dialog box appears.
4. Click **Break**.
   The share is broken
5. Click **OK**.

   You are returned to the Rooming List. The Room field for all the guests in the broken share is now blank, and will need to be reassigned.

**Blocks**

The Advanced Group Module (Blocks) is a powerful way to handle large groups and, convention bookings with a variety of room types and a range of arrival and departure dates, as well as other allotments, such as travel agent allotments and tour series.

- The parameter `PAR_ALLOT` must be turned ON.

**Block components**

A block consists of a number of components linked together to give the block system power and flexibility.

- The **Block Header**: Contains basic information about the block, such as the block code, name, arrival and departure dates, default rate, and reservation type. Required for every block.
- **Profiles**: Up to four profiles may be attached to each block:
  - **Group Master Profile**: Contains name, address, phone number of group coordinator, as well as other group information. In some cases a travel agent profile may be used as the group profile. Required for all blocks.
  - **Company/Travel Agent/Source Profile**: Attach one of these profiles if you wish to maintain statistics for the organization that generated the block; you can then search for group members using the profile name as well as the block name.
- **The Pay Master (PM) Reservation**: Contains default values for most of the fields on the reservation screen. Also creates a PM room to be used for group billing. Can only be accessed through Group Detail Maintenance.
- **The Room Grid**: The number of rooms of each type blocked for each night are entered on the grid. Rates may also be entered. As changes are made to the grid, in addition to the actual block, you may view grids of the initial block, the available rooms, the picked up rooms, and the changes from the initial block.
- **Individual Reservations**: An individual reservation must be made for each guest who is part of the group.

**These components are generally created in the following order:**

1. Block header - see To create a block header
2. Profiles - see To create the group master profile.
3. Room Grid (including rates) - see Grid.
4. Updating block and room/rate grids as work with client to finalize group specifications - see Grid.
5. Change status to Open for Pickup - see Change Status.
6. Create PM - see To create the pay master (Post Master).
7. Can now make individual reservations using Rooming List - see Rooming List.

**Accessing Block Components**

The various block components are accessed through either Group Block Maintenance or Group Detail Maintenance as follows:

**Group Block Maintenance:**
- Block header
- Profiles
- Block Options
- Rooming and rates grids

**Group Detail Maintenance:**
- Group Reservation List
- Group Options
- Individual reservations

**Phases of a Block (Block Status)**

The block status corresponds to the phase of a block. Although four phases have been defined, not all phases must be used by all hotels, or used for every block. Each hotel must develop its own protocol for which phases to use, and when to change from one status to the next. (See Change Status.)

**The four phases are:**
- Offer: The first phase. The offer is entered into the system, but no rooms are actually blocked.
- Option: The next phase. The block is updated as negotiations continue, but no rooms are blocked yet.
- Initial: May be the first phase. A contact from the group requests a certain number of rooms for a certain period of time. Generally speaking, no contract has been signed, and no deposit has been received. However, at this point the rooms are now set aside (blocked) so that other sales people in the hotel do not sell those same rooms. You may still need to make periodic changes to the number of rooms blocked, the rates offered, and the dates of the block.
- Open for Pick-up: Always the final phase. In general, although the system imposes no requirements as to when to open for pick-up, hotels often wait until after all the arrangements for the group have been finalized. Only after the status is changed to Open For Pick-Up and the initial grid is closed, can you begin to make actual individual reservations.

If the parameter OFFEROPT is turned ON, all four phases are available to the user (but do not necessarily have to be used for every block.). If it is turned Off, only the Initial and Open for Pick-up phases are available.
The status is independent of reservation type. Either a tentative or definite
reservation type may be assigned to either the initial phases or the open for pick-
up phase. The reservation type does not automatically change when the group
changes into the open for pick-up phase.

History

The Block History provides an overview of past performance of group blocks. Two
days after the group departure date, the night audit transfers the block header
and allotment data to a block and allotment history file respectively. All detailed
data of the group block allotments is kept.

To view the block histories:
1. In the Groups screen, check the HISTORY checkbox, and enter the search fields
   as necessary (see To search for an existing block header).
   Only the blocks in the history file are displayed.
   Only the BLOCKS button (Group Block Maintenance option) are activated to
   provide access to the History listing.
2. Select the desired block and click BLOCKS.
   The history of the block appears.
   Only the following display buttons are activated:
   PROFILE
   GRID
   INFO
   OPTIONS: SUMMARY (Block Statistics appears only if the "Block Statistics" option
   is selected in Night Audit.)

Group Block Maintenance

The block header, profiles, and room and rates grids are all accessed and edited
from Group Block Maintenance.

How to create a block header:
1. From the main Suite 7 screen, click the Reservations icon.
   The Reservations toolbar appears to the right of the icons.
2. Click the GROUPS icon, or press CTRL + G.
   The Groups screen appears.
3. Click NEW.
   If the parameter OFFEROPT is turned ON, the system asks whether the status of
   the new block is Initial, Option or Offer.
4. Click on the appropriate button.
   A blank block header form appears; the status you selected appears in the
   upper right-hand corner.
5. Fill in the block header as explained in the Block Header table below. The
   block header options are explained in the Options in the Block Header table
   below.
6. To complete the block profile, click PROFILE and continue as explained in To
   create the group master profile.
To simply save the block header and return to the Groups screen, click OK.

The Block Header

<table>
<thead>
<tr>
<th>Fill in this field</th>
<th>With this information</th>
<th>Mandatory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block Code</td>
<td>Identifying code. Up to 10 alphanumeric characters, 7 for a tour series.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Full Name</td>
<td>Full name of the block. Up to 30 characters of text.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Starting Date</td>
<td>First arrival date for the block. It is possible to pickup a room from the block for a guest arriving before this date, if at least one night of his stay coincides with the group.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Nights</td>
<td>Number of nights for the reservation. If you enter the number of nights, the system will calculate the end date. You cannot change the start date so that previously blocked rooms will be out of the range.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>End Date</td>
<td>Last departure date for the group. If you specify the end date, the system will calculate the number of nights. You cannot change the end date so that previously blocked rooms will be out of the range.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Rate Code</td>
<td>Default rate code to be used on all reservations in the group. Even if the rate is closed to individual guests, it may be open for a group. If a rate code is entered here, you will not be able to edit the rates in the rate grid. If some, but not all, of the rates will be identical to an existing rate code, you may enter the rate code, and the rate grid will be automatically filled-in. You may then delete the rate code, which will allow you to edit the necessary cells in the grid. If you change or add a rate code after blocking rooms, you will need to use the Refresh Rate option. (See Refresh Grid Rates.)</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Reserv Type</td>
<td>Reservation type for the block. It is recommended to have certain reservation types that are for blocks only. The default is the default reservation type for blocks selected in the configuration. (See the Suite 7 Configuration Manual) When rooms are picked-up, the reservation type changes to the default reservation type for individuals.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Market Code</td>
<td>Default market code for the block. May be overridden on individual reservations.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Source Code</td>
<td>Default source code for the block. May be overridden on individual reservations.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Channel</td>
<td>Method by which the group reservation was made.</td>
<td></td>
</tr>
<tr>
<td>Fill in this field</td>
<td>With this information</td>
<td>Mandatory</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Activate Default Routing</td>
<td>May be used to configure default routing instructions for block reservations. These instructions will automatically be applied to all reservations entered through the rooming list function of the block. <strong>Note:</strong> When the PM account is created the default instructions are not applied to the PM account. The Rooming List is however automatically affected by the routing instructions.</td>
<td></td>
</tr>
<tr>
<td>Cutoff Date</td>
<td>Date on which night audit should release all rooms from the block that have not yet been picked-up. This is done by setting the number of rooms actually blocked equal to the number of picked-up rooms. The number of rooms available is then &quot;0&quot;, and the original block is, of course, unchanged. The rooms are returned to house availability and may be reserved by other guests. The procedure DELALLOT must be defined in the night audit sequence.</td>
<td></td>
</tr>
<tr>
<td>Cutoff Days</td>
<td>Number of days before the arrival date that rooms should be released. If not all guests are arriving on the same date, this means that a portion of the rooms are released each night over an interval corresponding to the range of the arrival dates. This is especially appropriate for travel agent allotments, where reservations must be picked-up, say, 14 days before the arrival date or they are returned to hotel availability. You may enter either Cutoff Date or Cutoff Days, but not both. If both are blank, rooms will be held until night audit of each arrival date. The procedure DELALLOT must be defined in the night audit sequence</td>
<td></td>
</tr>
<tr>
<td>PAX per Room</td>
<td>Average number of guests per room for the block.</td>
<td></td>
</tr>
<tr>
<td>Elastic Block</td>
<td>Check: If the number of rooms and starting and ending dates of the block may be modified in the rooming list. Blank: If the number of rooms and dates cannot be changed in the rooming list, but only in the rooms grid.</td>
<td></td>
</tr>
<tr>
<td>Rooms per day Offer /Option only</td>
<td>Projected total number of rooms per day.</td>
<td></td>
</tr>
<tr>
<td>Average rate Offer/Option only</td>
<td>Projected average rate.</td>
<td></td>
</tr>
</tbody>
</table>
### Fill in this field

<table>
<thead>
<tr>
<th>Field</th>
<th>With this information</th>
<th>Mandatory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue Offer/Option only</td>
<td>System computes projected revenue per day for the offer.</td>
<td></td>
</tr>
<tr>
<td>Packages</td>
<td>Any package elements included for the entire block.</td>
<td></td>
</tr>
<tr>
<td>Booking ID</td>
<td>Any ID that identifies this block as part of larger group, such as a tour series. For example, if the reservation is part of a larger booking controlled by the Sales &amp; Catering Program, you may enter the booking ID from the S&amp;C program.</td>
<td></td>
</tr>
<tr>
<td>Created By/ON</td>
<td>System automatically records the user ID that created the block, and the date on which it was created.</td>
<td></td>
</tr>
<tr>
<td>Group Master</td>
<td>Displays the full name of the attached group profile, if defined.</td>
<td></td>
</tr>
<tr>
<td>Departments</td>
<td>Only active if the option ACTIVATE DEFAULT ROUTING is selected.</td>
<td></td>
</tr>
<tr>
<td>Note:</td>
<td>The default field length for the department codes is 30 characters. If too many departments are selected, a message will be displayed to this effect and only the first 30 characters will be saved. To overcome this, either expand the length of the field in the database, or create a Billing Instruction code containing all relevant department codes using FConfig, Accounting, Billing Instructions.</td>
<td></td>
</tr>
</tbody>
</table>

### Options in the Block Header

<table>
<thead>
<tr>
<th>Click this option</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile</td>
<td>Create the group master profile, create or link company, travel agent, or source profiles to the block.</td>
</tr>
<tr>
<td>Grid</td>
<td>Display the rooming grid for the block.</td>
</tr>
<tr>
<td>Traces</td>
<td>Display the traces for the block.</td>
</tr>
<tr>
<td>Info</td>
<td>Enter any additional information about the group.</td>
</tr>
<tr>
<td>Chg Status</td>
<td>Change the block status from Initial to Open for Pick-up.</td>
</tr>
<tr>
<td>Cutoff</td>
<td>Release rooms from a block manually rather than automatically.</td>
</tr>
<tr>
<td>Options</td>
<td>Display the Block Options. (See Block Options.)</td>
</tr>
<tr>
<td>OK</td>
<td>Save changes and close the screen.</td>
</tr>
<tr>
<td>Abort</td>
<td>Close the screen without saving changes.</td>
</tr>
</tbody>
</table>
How to search for an existing block header, or all block headers meeting specified criteria:

1. Click the GROUPS icon, or press CTRL + G.
   The Groups screen appears.
2. Use the fields and the status radio buttons under the listing on the right to specify the search criteria.
3. Press ENTER or TAB.
   The block headers that meet the criteria are displayed.
4. You may narrow your search by filling another field.
   Only the block headers that meet the further criteria are displayed.
5. You may select one of the listed block headers to work with. Click either BLOCKS or DETAILS to continue.

Block Header Search Criteria

<table>
<thead>
<tr>
<th>This field</th>
<th>Is to search for blocks that</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block Search</td>
<td>Begin with the specified characters.</td>
</tr>
<tr>
<td>Date</td>
<td>Include the specified date within their range of stay dates.</td>
</tr>
<tr>
<td>First arrival</td>
<td>Have the specified first arrival date.</td>
</tr>
<tr>
<td>Trace Date</td>
<td>Have a trace on the date specified.</td>
</tr>
<tr>
<td>User ID</td>
<td>Were created by the specified user ID.</td>
</tr>
<tr>
<td>Agent</td>
<td>Were booked by the specified agent.</td>
</tr>
<tr>
<td>Status</td>
<td>Are of the selected status only.</td>
</tr>
</tbody>
</table>

Block Header Options

The buttons at the bottom of the block header allow you to access other options related to this block, such as the profile, and to perform functions such as changing the block status.

Options in the Block Header

<table>
<thead>
<tr>
<th>Click this option</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile</td>
<td>Create the group master profile, create or link company, travel agent, or source profiles to the block.</td>
</tr>
<tr>
<td>Grid</td>
<td>Display the rooming grid for the block.</td>
</tr>
<tr>
<td>Traces</td>
<td>Display the traces for the block.</td>
</tr>
<tr>
<td>Info</td>
<td>Enter any additional information about the group.</td>
</tr>
<tr>
<td>Chg Status</td>
<td>Change the block status from Initial to Open for Pick-up.</td>
</tr>
<tr>
<td>Cutoff</td>
<td>Release rooms from a block manually rather than automatically.</td>
</tr>
<tr>
<td>Options</td>
<td>Display the Block Options. (See Block Options.)</td>
</tr>
<tr>
<td>OK</td>
<td>Save changes and close the screen.</td>
</tr>
<tr>
<td>Abort</td>
<td>Close the screen without saving changes.</td>
</tr>
</tbody>
</table>
Profile

Use Profile to create the group master profile, and to create or link company, travel agent, or source profiles to the block.

**How to create the group master profile:**

1. Click **PROFILE**.
   - The Profile Linkage dialog box is displayed. The full name of the block appears as the group master name. This can be changed as required.
2. Click **OK**.
   - The Profile Search screen appears. If a profile with that name already exists, you may want to choose a different name for your group master.
3. Click **NEW**.
   - A blank group profile appears, with the group name you chose.
4. Fill in the profile as explained in the Block Header table below.
5. Click **SAVE**.
   - The group profile is saved.
6. Click **CLOSE**.
   - You are returned to the Profile Linkage dialog box. The name of the profile you just created appears as the group master, and the **PROFILE** and **UNLINK** buttons are now active.
7. Click **OK**.

*The Block Header*

<table>
<thead>
<tr>
<th>Fill in this field</th>
<th>With this information</th>
<th>Mandatory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block Code</td>
<td>Identifying code. Up to 10 alphanumeric characters, 7 for a tour series.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Full Name</td>
<td>Full name of the block. Up to 30 characters of text.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Starting Date</td>
<td>First arrival date for the block. It is possible to pickup a room from the block for a guest arriving before this date, if at least one night of his stay coincides with the group.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Nights</td>
<td>Number of nights for the reservation. If you enter the number of nights, the system will calculate the end date. You cannot change the start date so that previously blocked rooms will be out of the range.</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>Last departure date for the group. If you specify the end date, the system will calculate the number of nights. You cannot change the end date so that previously blocked rooms will be out of the range.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Fill in this field</td>
<td>With this information</td>
<td>Mandatory</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Rate Code</td>
<td>Default rate code to be used on all reservations in the group. Even if the rate is closed to individual guests, it may be open for a group. If a rate code is entered here, you will not be able to edit the rates in the rate grid. If some, but not all, of the rates will be identical to an existing rate code, you may enter the rate code, and the rate grid will be automatically filled-in. You may then delete the rate code, which will allow you to edit the necessary cells in the grid. If you change or add a rate code after blocking rooms, you will need to use the Refresh Rate option. (See Refresh Grid Rates.)</td>
<td></td>
</tr>
<tr>
<td>Reserv Type</td>
<td>Reservation type for the block. It is recommended to have certain reservation types that are for blocks only. The default is the default reservation type for blocks selected in the configuration. (See the Suite 7 Configuration Manual) When rooms are picked-up, the reservation type changes to the default reservation type for individuals.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Market Code</td>
<td>Default market code for the block. May be overridden on individual reservations.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Source Code</td>
<td>Default source code for the block. May be overridden on individual reservations.</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Channel</td>
<td>Method by which the group reservation was made.</td>
<td></td>
</tr>
<tr>
<td>Cutoff Date</td>
<td>Date on which night audit should release all rooms from the block that have not yet been picked-up. This is done by setting the number of rooms actually blocked equal to the number of picked-up rooms. The number of rooms available is then &quot;0&quot;, and the original block is, of course, unchanged. The rooms are returned to house availability and may be reserved by other guests. The procedure DELALLOT must be defined in the night audit sequence.</td>
<td></td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cutoff Days</td>
<td>Number of days before the arrival date that rooms should be released. If not all guests are arriving on the same date, this means that a portion of the rooms are released each night over an interval corresponding to the range of the arrival dates. This is especially appropriate for travel agent allotments, where reservations must be picked-up, say, 14 days before the arrival date or they are returned to hotel availability. You may enter either Cutoff Date or Cutoff Days, but not both. If both are blank, rooms will be held until night audit of each arrival date. The procedure DELALLOT must be defined in the night audit sequence.</td>
</tr>
<tr>
<td>PAX per Room</td>
<td>Average number of guests per room for the block.</td>
</tr>
<tr>
<td>Elastic Block</td>
<td>Check: If the number of rooms and starting and ending dates of the block may be modified in the rooming list. Blank: If the number of rooms and dates cannot be changed in the rooming list, but only in the rooms grid.</td>
</tr>
<tr>
<td>Rooms per day</td>
<td>Projected total number of rooms per day.</td>
</tr>
<tr>
<td>Average rate</td>
<td>Projected average rate.</td>
</tr>
<tr>
<td>Revenue</td>
<td>System computes projected revenue per day for the offer.</td>
</tr>
<tr>
<td>Packages</td>
<td>Any package elements included for the entire block.</td>
</tr>
<tr>
<td>Booking ID</td>
<td>Any ID that identifies this block as part of larger group, such as a tour series. For example, if the reservation is part of a larger booking controlled by the Sales &amp; Catering Program, you may enter the booking ID from the S&amp;C program.</td>
</tr>
<tr>
<td>Created By/ON</td>
<td>System automatically records the user ID that created the block, and the date on which it was created.</td>
</tr>
<tr>
<td>Group Master</td>
<td>Displays the full name of the attached group profile, if defined.</td>
</tr>
</tbody>
</table>
How to link other profiles to the block header:
1. Click PROFILE.
   The Profile Linkage dialog box appears, with the name of the group master displayed.
2. Click on the field of the type of profile that you want to link, either company, travel agent, or source or type in all or part of the name of the organization in the field and click OK.
   The Profile Search screen appears, displaying a listing of all the selected type of profiles, or a partial listing that meets the search criteria.
3. Select the profile that you want to link to the block. If a profile does not exist, click New to create one. (See Profiles)
4. Click OK.
   The profile you selected is now linked to the block. You are returned to the Profile Linkage dialog box. The name of the profile appears in the field, and the PROFILE and UNLINK buttons are now active for that field.
5. Click OK.

How to unlink a profile from the block header:
1. Click PROFILE.
   The Profile Linkage dialog box appears, with the name of the group master, and other associated profiles displayed.
2. Click on the profile that you want to unlink.
3. Click UNLINK.
   The system asks for confirmation before unlinking the profile.
4. Click YES.
   The profile you selected is now unlinked from the block. You are returned to the Profile Linkage dialog box. The field you unlinked is empty, and the PROFILE and UNLINK buttons are not active for that field.
5. Click OK.

Grid
Use GRID to access the room and rates grids. The room grid allows you to enter the number of rooms to be blocked for each room type for each date.

The rate grid allows you to enter specific rates for up to four persons per room for all the different room types. A rate in the block header will override the rate grid, but the rate grid will override a rate in the postmaster reservation.

How to use the room grid:
1. Click GRID.
   The Room Grid appears.
   If the block is open for pickup, any of the grids may be viewed, but not all may be edited. Click the radio button to display the grid you want to see.
   If the block is still in the initial phase, only the initial, rates, and S&C Ceiling grids are available.
2. There are two ways to edit the grid; using the Set button, or using the mouse.
   To use the set button:
a. In the Room Type field, highlight all the room types for all dates that will have the same number of rooms.
b. Use the From and To fields to select the range of dates, if too large to select on the grid.
c. Type in the number of rooms to be set, and a cutoff date or days if applicable. If you are setting rates, type in the rates for up to four persons per room.
d. If you want to add or subtract from the present number, check the increase/decrease box.
e. Click Set.

The specified number appears in the grid for all selected room types and dates.

**To use the mouse:**

a. Highlight all the squares on the grid that will have the same number of rooms. You may use the Priorities option to group room types together on the grid.
b. Type the number.
The number appears in all the highlighted squares.
You may also use any of the available buttons at the bottom of the screen.

3. When you are finished, click CLOSE.

**How to use the rates grid:**

1. Click GRID.
The room grid appears.
2. Click the RATES radio button.
The rates grid appears.
3. The rate grid is edited using the Set button only:
   a. In the Room Type field, highlight all the room types for all dates that will have the same rate.
   b. Use the From and To fields to select the range of dates, if too large to select on the grid.
   c. In the Set Rate Values fields, type in the rates for up to four persons per room.
   d. Click Set.

The rate for one person appears in the grid for all selected room types and dates.
The rates for more than one person for a selected room type appear in the right-hand column of the Set Rate Values fields.
You may also use any of the available buttons at the bottom of the screen.
4. When you are finished, click CLOSE.
### The Grids

<table>
<thead>
<tr>
<th>This grid</th>
<th>Shows you this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Block</td>
<td>Room grid as it was finalized at the end of the initial phase.</td>
</tr>
<tr>
<td>Actual Blocked</td>
<td>Grid of the actual number of rooms that have been blocked to date.</td>
</tr>
<tr>
<td>Available</td>
<td>Grid of the number of rooms still available for pickup.</td>
</tr>
<tr>
<td>Pickup</td>
<td>Grid of the number of and percentage of rooms picked up.</td>
</tr>
<tr>
<td>Changes to Initial</td>
<td>Grid of the differences between the actual block and the initial block.</td>
</tr>
<tr>
<td>Rates</td>
<td>Grid of the rates for the various room types. Instead of the No. of Rooms, the Set Rate Values fields appear, which allow you to enter different rates for up to four persons per room. The rates for one person per room appear in the grid, and the other rates for a highlighted room type appear in the display fields in the Set Rate Values section.</td>
</tr>
<tr>
<td>S&amp;C Ceiling</td>
<td>Grid of the actual number of rooms held by the S&amp;C ceiling.</td>
</tr>
<tr>
<td>Booking Position</td>
<td>The number of rooms that are booked, but do not yet have a guest name assigned.</td>
</tr>
</tbody>
</table>

### Set Options for Room Grid

<table>
<thead>
<tr>
<th>Fill in this field</th>
<th>With this information</th>
<th>By doing this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room Type</td>
<td>All the rooms types to be set.</td>
<td>Highlighting the room types you want to select.</td>
</tr>
<tr>
<td>From</td>
<td>The start date of the range to be set.</td>
<td>Clicking on the field and selecting the date.</td>
</tr>
<tr>
<td>To</td>
<td>The last date of the range to be set.</td>
<td>Clicking on the field and selecting the date.</td>
</tr>
<tr>
<td>Increase/Dec Rooms</td>
<td>Increases or decreases by the number specified in the No. of Rooms field.</td>
<td>Checking the box and typing the number in the No. of Rooms field/Available/Allotted. If you want to decrease, you must enter a negative number there.</td>
</tr>
</tbody>
</table>
Fill in this field | With this information | By doing this
---|---|---
No. of Rooms/ Allotted/ Available | The number of rooms to be set for all selected room types for all selected dates. When viewing the Actual Blocked or Available grids, this field allows you to enter the number of rooms Allotted or Available respectively. If you need to increase or decrease the number of rooms, you may manually enter either one of these numbers, and the other grids are automatically updated. The number of rooms in a selected cell for any grid appears in the display-only field to the right. | Typing in the number in the field.
Cut-off Date | The cut-off date for all selected room types for all selected dates. The cut-off date for a selected cell for any grid appears in the display-only field to the right. | Clicking on the field and selecting the date.
Cut-off Days | The number of cut-off days for all selected room types for all selected dates. (See Cutoff Days field in the block header, page 250). | Typing in the number the field.
Set Rate Values | (When the rate grid is selected) | Typing in the rate in the field.

Grid Options

Click this button | To do this
---|---
Scope | Display a listbox in order to select the room types or summary room types to be displayed in the grid.
Set | Set the specified number of rooms in all selected room types for the selected range.
Delete | Delete the value in the highlighted squares.
Weekdays | Display a listbox to select the days of the week to be included when setting rooms with the Set function. This is very useful when you are creating a block extending over a period of a number of months as for an allocation or an airline crew. In this case, you may wish to block only certain days of the week throughout the range of the block.
Click this
button  To do this

Priorities  Display a listbox to select the room types that you are working with. They will then all appear at the beginning of the grid, and the unused room types will be at the end.

Reserv  Display the listing of individual reservations for the selected room type on the selected date

Details  Display the detail information for the selected room type on the selected date. (See Table 49 below.)

Close  Close the room grid.

Detail for Room Types

<table>
<thead>
<tr>
<th>This field</th>
<th>Tells you</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Block</td>
<td>Number of rooms of this type in the initial block.</td>
</tr>
<tr>
<td>Current Block</td>
<td>Number of rooms of this type in the current block.</td>
</tr>
<tr>
<td>Pickup</td>
<td>Number and percentage of rooms of this type that have been picked up.</td>
</tr>
<tr>
<td>Remaining</td>
<td>Number of rooms of this type remaining in the block.</td>
</tr>
<tr>
<td>Rate</td>
<td>Rates for this room type for up to four persons per room.</td>
</tr>
<tr>
<td>Change to Initial</td>
<td>Difference between the initial and current number of rooms of this type.</td>
</tr>
<tr>
<td>Cutoff Date</td>
<td>Cutoff date for this room type.</td>
</tr>
<tr>
<td>Total Block</td>
<td>Total number of rooms in the block.</td>
</tr>
<tr>
<td>(Selected room type)</td>
<td>Number of rooms of this type available in the hotel.</td>
</tr>
<tr>
<td>Available</td>
<td></td>
</tr>
<tr>
<td>(Selected room type)</td>
<td>Number of current tentative reservations for rooms of this type in the hotel.</td>
</tr>
<tr>
<td>Tent. Res</td>
<td></td>
</tr>
<tr>
<td>House Available</td>
<td>Total number of rooms available in the hotel.</td>
</tr>
<tr>
<td>House Tentative</td>
<td>Total number of current tentative reservations in the hotel.</td>
</tr>
</tbody>
</table>

Traces

Use TRACES to keep a log of actions and the date on which they took place.

You may use traces for both past events, such as phone conversations with the contact person, and future reminders, such as the date on which to send out the contract, the date by which the deposit must be received, etc.

You may use the Trace Date field on the main Groups screen to search for all traces for a given date. This way you can see at a glance all your reminders for the day.
How to use Traces:
1. Click Traces.
   The Block Traces dialog box appears.
2. If editing, highlight the trace listing that you want to edit in the top portion of
   the dialog box.
3. Click Edit, or New to enter a new trace.
   The Group Traces dialog box appears.
4. Enter the date of the trace by selecting it from the calendar that appears
   when you click on the Trace Date field.
5. Type in the trace information as free form text in the space provided.
6. Click OK.

Info
Use Info to type in any summary information about the group, reminders, or
additional information about the block. The info is displayed both in the main
groups screen when the block is selected and on the Reservation form when the
block code is selected.

A block info template may be defined under Setup->User Configuration->Edit
Text Files.

When changing block information on a block which belongs to a tour series the
user will be prompted with a message asking if the block information should be
copied to all blocks linked in the tour series. Selecting yes will copy all the
information text to all other the other blocks in the tour series. However; if the
block info template contains variables, these variables will NOT be updated and
must be updated manually by the user.

How to use Info:
1. Click Info.
   The Group Information dialog box appears.
2. Type in any information you need in a format that will be easy to see at a
   glance. If you want to print out the information, click PRINT.
3. Click OK.

Change Status
In order to actually make reservations, the status of the block must be changed
to Open for Pick-up. Use CHG STATUS to do this. Each hotel sets its own policy on
when to change status. It is often convenient to open for pick-up after all the
arrangements for the group have been finalized; the contract signed and deposit
received. At whatever point you choose to change status, the initial grid is 'closed'
and then all changes are recorded as a difference between initial and actual.

Before this, any changes to the number of rooms are not logged in a way that
then allows easy comparison of initial and actual.

If the block was created with an initial status of Offer, the status must first be
changed to Option, then to Initial, and finally to Open for Pick-up.
**How to change Status:**

1. Click CHG STATUS.
   
   The system asks for confirmation in changing to the next phase, and warns of potential problems. Once the status is changed to Open for Pick-up, it cannot be changed. See initial.

2. Click YES.

**Cutoff**

Use CUTOFF to release a block at any time during the day. If a cutoff date or number of cutoff days has been specified, the cutoff occurs automatically during the night audit. However, there may be situations in which rooms are still available in the block and need to be released. This can either be done manually in the grid or with the cutoff option.

**How to use Cutoff:**

1. Click CUTOFF.
   
   The system asks for confirmation.

2. Click YES.

**Block Options**

Click on OPTIONS at the bottom of the block header to display the block options.

**Block Options**

<table>
<thead>
<tr>
<th>Click this option</th>
<th>To do this</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Remove the block header from the system.</td>
<td></td>
</tr>
<tr>
<td>Move Block</td>
<td>Move the entire block to a different starting date</td>
<td></td>
</tr>
<tr>
<td>Refresh Grid Rates</td>
<td>Update the rate grid if you change rate codes in the block header after entering rates into the rate grid.</td>
<td></td>
</tr>
<tr>
<td>Changes</td>
<td>See the record of all the changes made to the block.</td>
<td></td>
</tr>
<tr>
<td>Summary Info</td>
<td>See the summary and daily statistics for the block.</td>
<td></td>
</tr>
<tr>
<td>Cancel/Reinstate</td>
<td>Cancel a block header or reactivate a block which has been cancelled.</td>
<td></td>
</tr>
<tr>
<td>Tour series</td>
<td>Duplicate a block at regular intervals.</td>
<td></td>
</tr>
<tr>
<td>Custom Tour Series</td>
<td>Duplicate a block on selected dates.</td>
<td></td>
</tr>
<tr>
<td>Booking Position History</td>
<td>View a list of the Booking Position History for the block.</td>
<td></td>
</tr>
</tbody>
</table>

**Delete**

Use DELETE to completely remove the block header from the system. A block cannot be deleted if reservations have already been made.

1. Click DELETE.
   
   The system asks for confirmation.

2. Click YES.
Move Block

Use MOVE BLOCK to move the entire block to a different starting date. This is only possible if no reservations have been entered.

It is not recommended to use Move Block to move a block in a tour series. Since the block code is not updated, confusion may result from the tours no longer being numbered in chronological order.

How to use Move Block:

1. Click MOVE BLOCK.
   The Move Block dialog box appears.

2. Type in the new starting date, or select it from the calendar displayed by clicking on the date field.

3. Click OK.
   The block now begins on the specified date. All other dates are adjusted accordingly, but everything else is unchanged.

Refresh Grid Rates

Use REFRESH GRID RATES if you change rate codes in the block header after entering rates into the rate grid. All block statistics and summaries will then be updated.

How to use Refresh Grid Rates:

1. Click REFRESH GRID RATES.
   The rate grid is updated. The system informs you if a rate is not specified for every room type.

2. Click OK.

Changes

Use CHANGES to see the record of the changes made to the block, such as changes in dates, number of rooms, and status.

1. Click CHANGES.
   A listing appears of the changes made to the block, in chronological order.

2. Click CLOSE.

Summary Info

Use Summary Info to see the summary and daily statistics for the block.

1. Click SUMMARY INFO.
   The block summary statistics appear, comparing actual and potential revenue.

2. Click DAILY to view the group daily breakdown.

3. Click CLOSE.

Cancel/Reinstate

Use this Cancel to cancel the block header. You cannot cancel a block if reservations already have been made.

Use Reinstate to reactivate a block which has been cancelled. The status of the block is changed to Initial phase.
How to cancel a block:
1. Click CANCEL.
   The Cancel Block dialog box appears.
2. Click on the Reasons field
   The reasons for cancellation are displayed.
3. Select the applicable reason for this cancellation.
4. Click YES.
   The status of the block header is now "Cancelled".

How to reactivate a block:
1. Click REACTIVATE.
   The system asks for confirmation.
2. Click YES.
   The status of the block header is now "Initial".

Tour Series
Use TOUR SERIES to duplicate a block at regular intervals. The blocks which are part of a tour series are linked together internally through a series code.

How to enter a tour series:
1. Click TOUR SERIES.
   The Block Tour Series dialog box appears.
2. Fill in all the fields as explained in the Options in the Block Header table below.
3. Click OK.
   The system computes the number of series and asks for confirmation.
4. Click Yes.
   The required number of tour series are created. All are exact copies of the original tour series with the exception of the dates, and the block name, which is the block code plus a sequence number.
   The system informs you that the tour series has been created.
5. Click OK.
   You are returned to the Groups screen; the new tour series are now listed.

Options in the Block Header

<table>
<thead>
<tr>
<th>Click this option</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile</td>
<td>Create the group master profile, create or link company, travel agent, or source profiles to the block.</td>
</tr>
<tr>
<td>Grid</td>
<td>Display the rooming grid for the block.</td>
</tr>
<tr>
<td>Traces</td>
<td>Display the traces for the block.</td>
</tr>
<tr>
<td>Info</td>
<td>Enter any additional information about the group.</td>
</tr>
<tr>
<td>Chg Status</td>
<td>Change the block status from Initial to Open for Pick-up.</td>
</tr>
</tbody>
</table>
**Click this option** | **To do this**
---|---
Cutoff | Release rooms from a block manually rather than automatically.
Options | Display the Block Options. (See Block Options.)
OK | Save changes and close the screen.
Abort | Close the screen without saving changes.

**Custom Tour Series**

Use **CUSTOM TOUR SERIES** to create a tour series with user defined tour codes and specific start dates which do not occur at regular intervals.

1. **Click CUSTOM TOUR SERIES.**
   - The Custom Tour Series dialog box appears.
2. **Type in the name (10 characters) of the tour and select a date. Press TAB to display a new line.**
3. **Repeat step 2 for all the tours you want to create.**
   - The required number of tour series are created. All are exact copies of the original tour series with the exception of the dates, and the block code which you specified.
   - The system informs you that the tour series has been created.
4. **Click OK.**
   - You are returned to the Groups screen; the new blocks are now listed.

**Block Tour Series Fields**

<table>
<thead>
<tr>
<th><strong>Fill in this field</strong></th>
<th><strong>With this information</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tour Code</td>
<td>Seven-character code to be used with a sequence number to form the block code.</td>
</tr>
<tr>
<td>Frequency</td>
<td>Interval in weeks between tour arrival dates.</td>
</tr>
<tr>
<td>Next Tour</td>
<td>Date of the next tour, that is the first in the series of tours to be created.</td>
</tr>
<tr>
<td>Last Tour</td>
<td>Date of the last tour in the series.</td>
</tr>
<tr>
<td>Cutoff Days</td>
<td>Number of days before each arrival date to cut off the block.</td>
</tr>
</tbody>
</table>

**Booking Position History**

The Booking Position History option displays a grid of the changes in the booking position and the dates on which they were entered over the life of the block.

**To display the booking position history:**

Click **BOOKING POSITION HISTORY.**

The Booking Position History listing appears.
Group Detail Maintenance

This option is not available for a block that is still in the initial phase. It displays the Group Reservation List for the block. The Group Options and the Group Reservation List options are available in the Group Reservation List screen. See Group Reservations List Options and Group Options for an explanation of available options. The individual reservations are made using the Rooming List from the Group Options.

The first time that you enter Group Details Maintenance after changing the status to Open for Pick-up, a post master will automatically be created.

Create the pay master (Post Master):

1. Locate the block header you want to work with. (See To search for an existing block header).
2. Click DETAILS.
   The system informs you that it will create the post master.
3. Click OK.
   A new reservation form appears, with the name of the group master profile as the guest name. Certain fields, such as arrival date, departure date, rate code, market code, and source code are copied from the block header.
4. Edit the reservation as necessary. All fields will be the default values for the entire group.
   If you have entered rates in the rate grid, they will override an entry in the Rate field here.
5. Click OK.
   The system assigns a reservation number.
6. Click OK.
   The Reservation List appears, displaying the PM record.
7. Click CLOSE.
   You are returned to Groups screen.
8. Click CLOSE.
   You are returned to the main Reservations module screen.

Access the Group Reservation List:

1. Locate the block header you want to work with as described above. (See To search for an existing block header).
2. Click DETAILS.
   The Reservation List appears, displaying the PM reservation and any individual group reservations. The Available Room Grid appears at the lower left.
   See Group Reservations List Options and Group Options for an explanation of available options. Remember that, with the exception of GROUP OPTIONS and SEARCH, the options apply to the record that is highlighted.
3. Click CLOSE.
   You are returned to Groups screen.
4. Click CLOSE.
   You are returned to the main Reservations module screen.
### Group Reservations List Options

<table>
<thead>
<tr>
<th>Click this option</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Display the reservation form of the selected guest for editing.</td>
</tr>
<tr>
<td>Check In/Billing</td>
<td>Check in the selected guest.</td>
</tr>
<tr>
<td></td>
<td>If the guest has been checked in, this button toggles to Billing to connect you to the guest's bill in Cashiering.</td>
</tr>
<tr>
<td>Profile</td>
<td>Display the Profile of the selected guest.</td>
</tr>
<tr>
<td>Cancel/ Reactivate/ Cancel CI</td>
<td>Toggle between cancelling and reactivating the selected reservation (group or individual).</td>
</tr>
<tr>
<td></td>
<td>Also can cancel the entire group, if the pay master reservation is selected.</td>
</tr>
<tr>
<td></td>
<td>If the guest is checked in, this button cancels the check in (Cancel CI).</td>
</tr>
<tr>
<td>Options</td>
<td>Display the Options screen. (See Reservations Options.)</td>
</tr>
<tr>
<td>Group Op</td>
<td>Display the Group Options screen. (See Group Options.)</td>
</tr>
<tr>
<td>Split All</td>
<td>Split the entire group reservation into individual reservations. Adamit.</td>
</tr>
<tr>
<td>Search</td>
<td>Find selected individual reservations within a group.</td>
</tr>
<tr>
<td>Close</td>
<td>Close the Group Reservation List.</td>
</tr>
</tbody>
</table>

### Group Options

<table>
<thead>
<tr>
<th>This Group option</th>
<th>Does this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rooming list</td>
<td>Makes individual group reservations, assigns shared rooms.</td>
</tr>
<tr>
<td>Check In Group</td>
<td>Automatically checks in all guests in a group at one time.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the group from the system.</td>
</tr>
<tr>
<td>Room Assign</td>
<td>Automatically assigns room numbers to individual reservations in a group.</td>
</tr>
<tr>
<td>Room Type Assign</td>
<td>Automatically assigns specific room types to individual reservations that have been made using generic room types.</td>
</tr>
<tr>
<td>New Postmaster</td>
<td>Automatically copies the postmaster - makes an additional postmaster</td>
</tr>
<tr>
<td>Statistic</td>
<td>Displays summary statistics for the group.</td>
</tr>
<tr>
<td>Room Status</td>
<td>Displays the status of the rooms reserved for the group.</td>
</tr>
<tr>
<td>Print Keys</td>
<td>Automatically prints keys for an entire group.</td>
</tr>
</tbody>
</table>
Rooming List

Use Rooming List to make individual reservations for a group and to assign shared rooms.

You may find it convenient to create a more streamlined Rooming List template that is tailor-made to your own needs. You can delete and change the width and order of columns, and then save the template for future use with any group.

How to enter a group rooming list:

1. Display the Group Reservation List for the group. (See To find the Group Reservation List for an existing standard group reservation). (To display the Reservation list for a block, see To access the Group Reservation List).
2. Select the group master.
3. Click GROUP OPTIONS.
   The Group Options dialog box appears.
4. Click ROOMING LIST.
   The Group Rooming List dialog box appears. The group or block name appears in the Name field; all other information is copied from the group master or post master.
   The options in the Rooming List are explained in the Rooming List Functions table below.
5. Type in the first and last name of the guest, as well as any other necessary information. The fields are all self-explanatory. Use the mouse or the press TAB to move from field to field. You may click on the following fields to display a drop-down box rather than typing: Title, Arrival, Departure, Room (displays the Room Search dialog box.), Specials and Packages.
6. Press ENTER to display a new line (reservation) which is copy of the original selected reservation. (or arrow down)
7. Repeat step 5 and step 6 until the entire rooming list has been entered.
8. Click SAVE.
   The individual group reservations that have been created are saved.
9. Click CLOSE.
   You are returned to the Group Reservation List. The new individual reservations that have just been created appear in the bottom portion of the display.

Rooming List Functions

<table>
<thead>
<tr>
<th>Clicking this option</th>
<th>Does this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template</td>
<td>Displays the available rooming list templates (For instructions on how to create your own template, see To create or edit a Rooming List template.)</td>
</tr>
<tr>
<td>Check Guest Profile</td>
<td>Indicates whether to check to see if a profile already exists for each guest as the listings are created.</td>
</tr>
<tr>
<td>Creation Name</td>
<td>Sorts the listing in order of creation date.</td>
</tr>
<tr>
<td>Name</td>
<td>Sorts the listing in order of last name.</td>
</tr>
<tr>
<td>Clicking this option</td>
<td>Does this</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Arrival</td>
<td>Sorts the listing in order of arrival date.</td>
</tr>
<tr>
<td>Room</td>
<td>Sorts the listing in order of room number.</td>
</tr>
<tr>
<td>New</td>
<td>Displays only new reservations being made.</td>
</tr>
<tr>
<td>All</td>
<td>Displays all existing reservations in the group.</td>
</tr>
<tr>
<td>Zero</td>
<td>Sets the payment method for a shared room to Zero: first guest pays the entire price, others pay zero.</td>
</tr>
<tr>
<td>Full</td>
<td>Sets the payment method for a shared room to Full: each guest pays the full rate.</td>
</tr>
<tr>
<td>Even</td>
<td>Sets the payment method for a shared room to Even: The rate is divided equally between all the sharing guests.</td>
</tr>
<tr>
<td>Share</td>
<td>Sets shared rooms. (See Sharing.)</td>
</tr>
<tr>
<td>Traces</td>
<td>Displays the Traces form for the selected guest. (See Reservations Options.)</td>
</tr>
<tr>
<td>Messages</td>
<td>Displays the Messages form for the selected guest. (See Reservations Options)</td>
</tr>
<tr>
<td>Profile</td>
<td>Displays the Profile of the selected guest. (See Profiles.)</td>
</tr>
<tr>
<td>Reserv</td>
<td>Displays the reservation form for the selected guest.</td>
</tr>
<tr>
<td>Grid</td>
<td>Displays the rooming grid for the block. (Not activated in the Standard Group module.)</td>
</tr>
<tr>
<td>Print</td>
<td>Prints a hard copy of the rooming list.</td>
</tr>
<tr>
<td>Undo</td>
<td>Deletes the last line that was created, if it has not already been saved.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves the rooming list.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the Group Rooming List dialog box.</td>
</tr>
</tbody>
</table>

How to create or edit a Rooming List template:

1. Display the Group Reservation List for any group. (See To find the Group Reservation List for an existing standard group reservation, or To access the Group Reservation List.)
2. Click GROUP OPTIONS.
3. Select the group master.
   The Group Options dialog box appears.
4. Click ROOMING LIST.
   The Group Rooming List dialog box appears.
5. Click on the Template field.
   A listbox appears, displaying all existing templates.
6. Select the template to be edited, or one to serve as the basis for a new template.
   The selected Rooming List is displayed in conformity with the selected template.
7. Edit the template as follows:
To delete a column:

a. Position the cursor on the column and right-click.
b. The template options are displayed.
c. Click DELETE COLUMN.

The column is deleted.

To move a column:

a. Position the cursor on the column name and hold down the left mouse button.
b. Drag the column to the desired position.
c. Release the mouse button.

The column is in the new position.

To change column width:

a. Position the cursor on the right-hand boundary of the column and hold down the left mouse button.
b. Move the column boundary to create desired width.

To delete a template:

a. Right-click anywhere in the Rooming List.
b. The template options are displayed.
c. Click DELETE CURRENT TEMPLATE.

The entire template is deleted.

To restore a column:

a. Right-click anywhere in the Rooming List.
b. The template options are displayed.
c. Highlight RESTORE COLUMN.

A listing of deleted columns appears.
d. Click on the desired column name.

The column is restored.

8. When the template is finished, right-click anywhere in the Rooming List.
   The template options are displayed.

9. Click SAVE TABLE TEMPLATE.
   The Save Table Template dialog box is displayed.

10. Type in the name of the template and click OK.
   If you type in a new name, a new template will be created and the original template will be unchanged. If you type in the same name, the system will ask for confirmation before overwriting.

11. Click Yes.
How to print the rooming list:

1. Display the Group Reservation List for the group. (See To find the Group Reservation List for an existing standard group reservation or to find the Reservation List for a block, see To access the Group Reservation List.)

2. Select the group master

3. Click GROUP OPTIONS
   The Group Options dialog box appears.

4. Click ROOMING LIST.
   The Group Rooming List dialog box appears.

5. Select the template and sort order.

6. When the Rooming List is displayed as you want it to be printed, right-click anywhere in the Rooming List.
   The template options are displayed.

7. Click PRINT.
   The Grid Print dialog box appears.

8. Click PRINT to print in the standard format, or ADVANCE to customize the print format and parameters. (See Printing with printing options for an explanation of Advance Print.)

Rooming List Functions

<table>
<thead>
<tr>
<th>Clicking this option</th>
<th>Does this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template</td>
<td>Displays the available rooming list templates (For instructions on how to create your own template, see To create or edit a Rooming List template.)</td>
</tr>
<tr>
<td>Check Guest Profile</td>
<td>Indicates whether to check to see if a profile already exists for each guest as the listings are created.</td>
</tr>
<tr>
<td>Creation</td>
<td>Sorts the listing in order of creation date.</td>
</tr>
<tr>
<td>Name</td>
<td>Sorts the listing in order of last name.</td>
</tr>
<tr>
<td>Arrival</td>
<td>Sorts the listing in order of arrival date.</td>
</tr>
<tr>
<td>Room</td>
<td>Sorts the listing in order of room number.</td>
</tr>
<tr>
<td>New</td>
<td>Displays only new reservations being made.</td>
</tr>
<tr>
<td>All</td>
<td>Displays all existing reservations in the group.</td>
</tr>
<tr>
<td>Zero</td>
<td>Sets the payment method for a shared room to Zero: first guest pays the entire price, others pay zero.</td>
</tr>
<tr>
<td>Full</td>
<td>Sets the payment method for a shared room to Full: each guest pays the full rate.</td>
</tr>
<tr>
<td>Even</td>
<td>Sets the payment method for a shared room to Even: The rate is divided equally between all the sharing guests.</td>
</tr>
<tr>
<td>Share</td>
<td>Sets shared rooms. (See Sharing.)</td>
</tr>
<tr>
<td>Traces</td>
<td>Displays the Traces form for the selected guest. (See Reservations Options.)</td>
</tr>
<tr>
<td>Clicking this option</td>
<td>Does this</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Messages</td>
<td>Displays the Messages form for the selected guest. (See Reservations Options)</td>
</tr>
<tr>
<td>Profile</td>
<td>Displays the Profile of the selected guest. (See Profiles.)</td>
</tr>
<tr>
<td>Reserv</td>
<td>Displays the reservation form for the selected guest.</td>
</tr>
<tr>
<td>Grid</td>
<td>Displays the rooming grid for the block. (Not activated in the Standard Group module.)</td>
</tr>
<tr>
<td>Print</td>
<td>Prints a hard copy of the rooming list.</td>
</tr>
<tr>
<td>Undo</td>
<td>Deletes the last line that was created, if it has not already been saved.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves the rooming list.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the Group Rooming List dialog box.</td>
</tr>
</tbody>
</table>

**Borrowing**

Occasionally, when you are entering the rooming list, you may want to reserve a room type which is not available in the block; either because they have all been picked-up, or because it was not one of the room types included in the block.

When you select a room type that has no available rooms, the system will "borrow" a room from the room type that has the most rooms still available. The number of available rooms for the selected room type is still "0", because the borrowed room was immediately picked-up.

The number of available rooms for the room type that was borrowed from is decreased by one. The number of actual blocked rooms for the selected room type stays the same, whereas the number for the room type that was borrowed from increases by one.

Borrowing from a room type does not increase the total size of the block. It only readjusts the allocation among the different room types.

**What If There Are No Rooms Left In the Block?**

If there are no available rooms left in the block, and the block is an elastic block, the room can be added. In this case, not only is the number of actual blocked rooms of the selected type increased, but the size of the block itself is also increased. If the block is not elastic, the system informs you that the reservation cannot be made as part of the block. (It may, however, be made as an individual reservation, or the change may be made in the room grid, where it is possible to increase the number of allocated rooms even for a block that is not elastic.)
### Events

With the Events option, Suite 7 Reservations can keep track of future events, and of critical dates and calendar periods, such as Christmas.

**How to open the Events dialog box:**

1. From the main Suite 7 screen, click the Reservations icon.

   ![Reservations toolbar](image)

   The Reservations toolbar appears to the right of the main menu icons.

   This toolbar is the starting point for all Suite 7 Reservation functions.

2. Click the Events icon.

   ![Events dialog box](image)

   The Events dialog box appears. It contains a list of all planned future events, and past events which have not been deleted.

**How to see the events forecast for a future period:**

1. From the Events dialog box, click the Start Show From drop-down menu.
   
   The drop-down calendar appears.

2. Click on the month and day you want the Events list to begin at.
   
   The first event on the chosen date is highlighted.

**How to create a new event:**

1. From the Events dialog box, in the FROM field, type the starting date of the event, or choose it from the drop-down calendar.

2. In the TO field, enter the ending date of the event.

3. In the EVENT field, type the name of the event.
   
   The OK button is highlighted.

4. In the NOTE field, type any notes relevant to the event (optional).

5. Click OK.
   
   The new event appears on the Events list.

6. Click CLOSE.
   
   Update runs and the Event Dialog box closes.
How to edit an event:
1. In the Events dialog box, double click the event.
   The details of the event appear in the lower frame of the dialog box.
2. Change the fields you want to edit.
3. Click OK.

How to delete an event:
1. Highlight the event you want to delete.
2. Click DELETE.
   You are prompted to confirm the deletion.
3. Click Yes.
   You return to the Events dialog box.
4. Click CLOSE.
   Update runs and the Event Dialog box closes.

Note: You can select and delete multiple events.
Leisure Activities

Leisure activities can be booked for hotel outlets. There are two categories of leisure outlets, outlets without services and outlets with services. Outlets without services may include booking a tennis court or a table at a restaurant. Outlets with services may include booking a hairdresser or the spa.

Postings for leisure bookings can be made directly from the leisure module.

Note: The Leisure option is available only if your hotel is configured for Suite 7 Leisure Management Module.

Opening the Leisure dialog box

To open the New Reservations dialog box:

1. From the main Suite 7 screen speed bar, click the Reservations icon.

   The Reservations toolbar appears to the right of the icons.

2. Click the Leisure Activities icon.

   The Leisure dialog box appears.

   Note: You can also open the Leisure dialog box from a Guest Reservation by clicking OPTIONS and then LEISURE. When you open the Leisure dialog box this way, the activities related to the specific guest appear.

On the left-hand side of the dialog box, under Outlets, are the leisure activity outlets.

On the right-hand side of the dialog box is the list of activities or services the currently highlighted outlet offers. (You may need to use the scroll bar to see all the information.)

Changing the date of the Leisure dialog box

When you change the date of the leisure box, the activities for the date specified appear. The default is today’s date.

To change the date of the Leisure dialog box:

1. From the Leisure dialog box, type the new date in the Date field or click the drop down arrow and select a date from the calendar.

2. Click SELECT.

   The Leisure dialog box appears with the activities for the date specified.
Making a Leisure Activity reservation

To make a Leisure Activity reservation:

1. From the Leisure Activities dialog box, select the OUTLET you require.

2. On the right-hand side, select the SERVICE.

3. Type the date in the DATE field or click the drop down arrow and select a date from the calendar. The default is today's date.

4. Click SELECT.
   The Leisure Scheduling dialog box appears for the selected service.

5. Select the time and location or name of the employee by whom the service is to be given, by placing the cursor on the available activity grid box that you want to book and click. If more than one time slot is required, drag and drop the cursor down to the next time slot.

   **Note:** You may need to scroll down to see all of the times slots and activities.

6. Click BOOKING.
   The Select Leisure Reservation Type dialog box appears.

7. Click the appropriate radio button.

8. In the NAME field type the guest's name.

9. Click OK.
   The Leisure Booking dialog box appears, with the information pertaining to the booking.

   **Note:** At the top right of the Leisure Booking dialog box, the booking type is indicated, that is whether the booking is for a hotel guest, a club member, an outside guest, or hotel staff.

10. Click the SERVICE drop down arrow and select a service from the list of services.

11. Type the Duration, Price, and Discount %, and select the Department from the drop-down list.

    If a Department code is not selected, the department code defined for either the activity or service is used. (The department code cannot be changed when posting.).

12. Click OK.
    The Leisure Schedule dialog box reappears, with the appropriate blocks marked off, and the details of the booking in the text box at the lower left corner below the Date field. If you click a cell that has a leisure activity booked, the guest name, employee name, and time are detailed in the text box.

   **TIP:** Double Click on an empty time slot to create a new leisure booking. In order to view or change an existing booking, double click on a reserved time slot. You cannot make a new reservation on a time slot which is either removed from availability or not open for bookings.
### Leisure Schedule dialog box options

<table>
<thead>
<tr>
<th>Click this button</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>←</td>
<td>Scroll the calendar back one week.</td>
</tr>
<tr>
<td>↓</td>
<td>Scroll the calendar back one day.</td>
</tr>
<tr>
<td>↑</td>
<td>Scroll the calendar forward one day.</td>
</tr>
<tr>
<td>→</td>
<td>Scroll the calendar forward one week.</td>
</tr>
</tbody>
</table>

**Booking**  
Make a leisure activity reservation.

**Delete**  
Delete the currently highlighted booking.

**Commence**  
Change the status of the currently highlighted leisure booking to "Checked In." An asterisk appears next to the name in the blocking. By pressing Commerce again you can cancel the "check-in".

**Guest Info**  
Display the available information about the guest. For example, if the leisure reservation is for an outside guest, a dialog box appears with the name and phone number. If the guest is a member, the guest profile appears.

**Close**  
Close the Leisure Scheduling dialog box.

### Select Leisure Activities radio buttons

<table>
<thead>
<tr>
<th>Click this radio button</th>
<th>For this case</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select from Reservation file</td>
<td>A guest with a reservation in the hotel.</td>
</tr>
</tbody>
</table>

**Note:** If the reservation is cancelled, and no charges have been posted, Suite 7 will also cancel the leisure booking.

1. Click the Name field to display the reservation list.
2. Select a name from the reservation list.
3. Click OK.
<table>
<thead>
<tr>
<th>Click this radio button</th>
<th>For this case</th>
<th>Then do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select from Member file</td>
<td>A person with a guest profile who is not staying in the hotel.</td>
<td>1. Type in the member Name or the Member number or click the Name field to display the Profile Search screen.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Select a name from the Profile Search screen or create a new profile.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Click OK. Depending on the configuration setup, the membership number may be either mandatory or optional.</td>
</tr>
<tr>
<td>Outside guest</td>
<td>A guest with neither a member profile nor a hotel reservation.</td>
<td>Type in the name and click OK. The telephone number is optional.</td>
</tr>
<tr>
<td>Staff</td>
<td>Staff members.</td>
<td>Type in the name of the staff member and click OK. The telephone number is optional.</td>
</tr>
</tbody>
</table>

**Leisure Booking fields**

<table>
<thead>
<tr>
<th>Fill in this field</th>
<th>With this information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The guest or staff member's name</td>
</tr>
<tr>
<td>Member Number</td>
<td>The number of the member. This field is automatically filled in from the member's profile.</td>
</tr>
<tr>
<td>Room</td>
<td>The room number if the guest is a hotel guest.</td>
</tr>
<tr>
<td>Resv Dates</td>
<td>The reservation dates – arrival and departure.</td>
</tr>
<tr>
<td>Type</td>
<td>The type of guest for whom you have made the booking: Hotel Guest, Member, Outside Guest or Staff. A different booking type can be selected only if the original booking type is for an Outside Guest or Staff Member.</td>
</tr>
<tr>
<td>Date</td>
<td>The date of the booking.</td>
</tr>
<tr>
<td>Start Time</td>
<td>The starting time for the leisure activity. You cannot change the start time from this dialog box.</td>
</tr>
<tr>
<td>Duration (Minutes)</td>
<td>The duration of the activity. Default is the standard duration for this activity as configured in the setup program.</td>
</tr>
<tr>
<td>End Time</td>
<td>The end time for the booking. This field cannot be changed directly but is affected by the Duration field.</td>
</tr>
<tr>
<td>Service</td>
<td>The leisure activity selected.</td>
</tr>
<tr>
<td>Booking Type</td>
<td>The type of guest for whom you have made the booking: Hotel Guest, Member, Outside Guest or Staff. This field cannot be changed.</td>
</tr>
</tbody>
</table>
### Fill in this field | With this information
--- | ---
Persons (in non-screen only) | Number of people participating in the activity. The Persons field defaults to the standard number of participants as configured in the setup program.
Dept. | The department code that will be used when charging for the activity. From this screen another department code can be selected.
Price | The price of the activity in the currency defined as default for the hotel. The price is calculated automatically based on the activity, date, time, duration, persons, and discount. You can accept the price or modify it.
Discount % | Percentage of price discount. Default is 0 (no discount).
User | The name of the user who entered the leisure booking.
Created | Creation date of the leisure booking.
Notes | Free text for special notes pertaining to this leisure booking.

### Changing a Leisure Booking

#### Changing the booking time or date by cutting and pasting

**To change the booking time or date by cutting and pasting:**

1. From the Leisure Activities dialog box, select the Outlet you require.
2. On the right-hand side, select the Service.
3. Type the date in the Date field or click the drop down arrow and select a date from the calendar. The default is today's date.
4. Click **Select**.
   - The Leisure Scheduling dialog box appears for the selected service.
5. Highlighting the booking and click the right mouse button.
   - The Leisure Activity menu appears.
6. Click **Cut**.
7. If you want to move the activity reservation to a new date, enter a new date in the Date field. Select a new time slot and click the right mouse button.
   - The Leisure Activity menu appears.
8. Click **Paste**.
   - The date and/or time are changed.
9. Click **OK**.
   - The Leisure Schedule dialog box is closed.

#### Changing the booking time by dragging and dropping

**To change the booking time by dragging and dropping:**

1. From the Leisure Activities dialog box, select the Outlet you require.
2. On the right-hand side, select the Service.
3. Type the date in the Date field or click the drop down arrow and select a date from the calendar. The default is today's date.
4. Click SELECT.
   The Leisure Scheduling dialog box appears for the selected service.

5. Place the cursor on the booking and click.

6. Drag and drop the booking to the new time and location or name of the employee by whom the service is to be given.
   The time of the booking is changed.

7. Click OK.
   The Leisure Schedule dialog box is closed.

### Changing the Booking fields

You can change the booking fields such as, duration, persons, price, department, notes, name, or phone number.

**To change the Booking fields:**

1. From the Leisure Activities dialog box, select the Outlet you require.
2. On the right-hand side, select the Service.
3. Type the date in the Date field or click the drop down arrow and select a date from the calendar. The default is today's date.
4. Click SELECT.
   The Leisure Scheduling dialog box appears for the selected service.
5. Place the cursor on the booking and double click or click BOOKING.
   The Leisure Booking dialog box appears, with the information pertaining to the booking.
6. Edit any of the fields.
7. Click OK.
8. The Leisure Booking dialog box is closed and the Leisure Schedule dialog box appears.
9. Click OK.
10. The Leisure Schedule dialog box is closed.

### Checking in a Leisure Booking

When the guest(s) arrives for the Leisure activity you can check them in to indicate that they have arrived at the activity.

**To check in a guest for the leisure activity:**

1. From the Leisure dialog box, select the activity and click SELECT.
   The dialog box for the selected activity appears.
2. Select the booking you want to check-in and click COMMENCE.
   The system indicates that the booking has been checked in.
   The information on the leisure activity will be added to the guest's folio.
   An asterisk appears next to the name of the checked-in guest.
Posting leisure activity charges

You can manually post leisure charges directly from the Leisure screen once the booking has commenced. Under certain circumstances, the posting may also be made automatically:

- If a guest is an early departure, any commenced leisure booking for this day will be posted automatically during check-out.
- For in-house guests it is possible to have the system make the posting automatically during the night audit. However the leisure booking must be marked as commenced.

**Note:** No changes may be made to the Manual Posting screen. Make sure that a department code is assigned in the Booking dialog box, and that the proper price is specified.

To post a leisure activity charge:

1. When a leisure booking has commenced, select the booking in the Leisure Schedule and click BILLING.
   
   The Leisure Booking dialog box appears.

2. Click BILLING.
   
   The Cashier Login dialog box appears.

3. Enter your cashier number and password, and click LOGIN.
   
   The Manual Posting dialog box appears.

   Remember that all fields are automatically filled, and cannot be edited.

   If the POST button is not activated, return to the Leisure Booking dialog box and make sure that a Department Code has been assigned.

4. Click POST.
   
   The posting is listed in the top section of the screen.

5. Click CLOSE.
   
   You are returned to the Leisure Schedule dialog box.

   If you open the Leisure Booking screen for the same booking, you will see that:

   - The Billing button does not appear.
   - The Amount Posted lamp appears.

Cancelling the check-in of a Leisure Booking

You cannot cancel a checked-in leisure activity if a charge was already posted for the activity. The CANCEL CHECK-IN button will be disabled.

To cancel the check-in of a guest for the leisure activity:

1. From the Leisure dialog box, select the activity and click SELECT.
   
   The dialog box for the selected activity appears. Next to checked-in guests, an asterisk appears.

2. Select the booking you want to remove from check-in and click COMMENCE.
   
   The system asks if you want to remove the check-in for that booking.

3. Click Yes.
The asterisk is removed from the booking.

**Deleting a Leisure Booking**

You cannot delete a leisure activity if a charge was already posted for the activity. The **DELETE** button will be disabled.

**To delete a leisure booking:**

1. From the Leisure dialog box, select the activity and click **SELECT**.
   
   The dialog box for the selected activity appears.

2. Select the booking you want to delete and click **DELETE**.
   
   The system asks if you want to delete that booking.

3. Click **YES**.
   
   The booking is removed.

**Viewing guest information**

**To view guest information:**

1. From the Leisure dialog box, select the activity and click **SELECT**.
   
   The dialog box for the selected activity appears.

2. Select the booking for the guest you want to view and click **GUEST INFO**.
   
   Depending on the type of booking, either the guest reservation, guest profile, or guest name is displayed. The guest profile appears. You may make changes to the guest reservation or profile if you have the rights.

3. Click **CLOSE**.
   
   The Leisure dialog box appears.

**Leisure Activities Menu Options**

**To open the Leisure Activity menu:**

Select a booking and click the right mouse button.

A menu of commands appears.

**Leisure Activities menu options**

<table>
<thead>
<tr>
<th>Select this menu item</th>
<th>To perform this action</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Reservation</td>
<td>To enter a new leisure booking.</td>
</tr>
<tr>
<td>Reservation Information</td>
<td>View the details of a leisure booking.</td>
</tr>
<tr>
<td>Delete Leisure Booking</td>
<td>To delete the selected leisure booking.</td>
</tr>
<tr>
<td>Remove/Restore Availability</td>
<td>Block a particular activity at certain time for a specific reason. For example, Lunch Break or Cleaning Duty.</td>
</tr>
<tr>
<td>Print</td>
<td>Prints out the schedule for that day, showing all bookings for all guests.</td>
</tr>
<tr>
<td>Cut</td>
<td>To select the highlighted booking in order to change resource, time or day.</td>
</tr>
</tbody>
</table>
Select this menu item | To perform this action
--- | ---
Paste | To place the highlighted booking in the new resource, time slot or day.
Change Booking Type | Change the booking type. (Type of guest: Existing Guest, Member, Outside Guest or Staff.)
Resource Information | Retrieve information about the location, item or person supplying the activity. This usually contains specific information, for example, if a tennis court is clay or grass.
Diary | Enter comments about the activity.
Expected Revenue | Calculate expected daily revenue for the service outlet or the activity on the selected day.

You can remove a block of time from the schedule for a specific reason; for example, Lunch Break or Cleaning Duty. The blocked time then is not available for booking.

You may also restore a block of time that was removed from availability.

**To remove availability:**
1. Select a booking or an empty activity grid box and click the right mouse button.
   The Leisure Activities menu appears.
2. Highlight **REMOVE AVAILABILITY**.
   The available reasons that are defined in the configuration program appear.
3. Click on the applicable reason.
   The time becomes blocked; the colour of the activity grid box is changed, and the selected reason is displayed.

**To restore availability:**
1. Select a block of removed time and click the right mouse button.
   The Leisure Activities menu appears.
2. Click on **RESTORE AVAILABILITY**.
   The block of time is now unmarked, and available for booking.

**Printing the leisure schedule**
You can print out the schedule for the selected day, showing all bookings for all guests.

**To print a schedule:**
1. Right-click anywhere in the Leisure Schedule screen.
   The Leisure Activities menu appears.
2. Click **PRINT**.
   The schedule is printed.
Changing the booking type

You can change the booking type. For example, the type was a member and after the change is an outside guest.

To change the booking type:

1. Select a booking and click the right mouse button.
   The Leisure Activities menu appears.
2. Click CHANGE BOOKING TYPE.
   A confirmation message appears asking if you want to change this type of booking.
3. Click Yes to confirm that you want to change the booking type.
   The Select Leisure Reservation Type dialog box appears.
4. Click the appropriate radio button.
5. In the Name field, type the guest’s name and follow the instructions in the Select Leisure Activities table below.
6. Click OK.
   The Select Leisure Reservation Type dialog box is closed and the booking type is changed.

Select Leisure Activities: radio buttons

<table>
<thead>
<tr>
<th>Click this radio button</th>
<th>For this case</th>
<th>Then do this</th>
</tr>
</thead>
</table>
| Select from Reservation file | A guest with a reservation in the hotel. Note: If the reservation is cancelled, and no charges have been posted, Suite 7 will also cancel the leisure booking. | 1. Click the Name field to display the reservation list.  
2. Select a name from the reservation list.  
3. Click OK.                                                                                           |
| Select from Member file | A person with a guest profile who is not staying in the hotel.                | 1. Type in the member Name or the Member number or click the Name field to display the Profile Search screen.  
2. Select a name from the Profile Search screen or create a new profile.  
3. Click OK.  
Depending on the configuration setup, the membership number may be either mandatory or optional. |
| Outside guest           | A guest with neither a member profile nor a hotel reservation.                | Type in the name and click OK.  
The telephone number is optional.                                                                 |

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### Viewing resource information about the activity

You may view any resource information that has been entered for a selected activity.

1. Select a booking and click the right mouse button.
   - The Leisure Activities menu appears.
2. Click **RESOURCE INFORMATION**.
   - If any information exists, it is displayed.
   - If no information exists, a message appears.

### Entering comments about the activity

**To enter comments about the activity:**

1. Select a booking and click the right mouse button.
   - The Leisure Activities menu appears.
2. Click **DIARY**.
   - The Diary text box appears.
3. Type in free text about the activity.
4. Click **SAVE**.
   - The comments are saved and the Diary text box is closed.

### Calculating expected revenue

You can calculate expected daily revenue for the service outlet or the activity on the selected day. You can view the totals. Suite 7 adds the price for each leisure booking reserved for the day and displays the total daily revenue at the bottom.

**How to calculate expected revenue:**

1. Select a booking and click the right mouse button.
   - The Leisure Activities menu appears.
2. Click **EXPECTED REVENUE**.
   - The Leisure Schedule dialog box appears displaying the revenue and total revenue.
3. Click **CLOSE**.
   - The Leisure Schedule dialog box is closed.
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