

Welcome

This training module deals with managing  
group reservations

# Group Reservations

To make a **group booking**, click on **New** under the Reservations tab.

RES - Ilona Test Lodge - Version 6.1.2.112

General Reservations Front Desk Accounting View Setup & Admin Log Off

Quotation **New** Deposit Tracking New Group Manage Groups All Reservations Internet Sync New Internet Reservations Allocations Out of Service Cancelled Reservations Print Calendar Book At Other Venue Reports

Previous Reservations

	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13		
	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F		
Dg Recently opened Reservations list						12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13		
Doubles	2	5	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Doubles	3	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Doubles	4	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Doubles	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Twins	10	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Twins	6	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Twins	7	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Twins	8	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Twins	9	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Singles	11	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Singles	12	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Singles	13	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Singles	14	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Singles	15	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Suites	16	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Suites	17	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Suites	18	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Honeymoon Suites	19	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
Day Trip 1 y Trip		7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	
Day Trip 2 y Trip		7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	
Day Trip 3 y Trip		7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	
Day Trip 4 y Trip		7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	

Select the **dates** and the number of **rooms** in the group.

New Reservation

Select the dates and room(s)

Arrival Date : 18 January 12  Nights : 2

Departure Date : 20 January 12

- 1 - Doubles
- 2 - Doubles
- 3 - Doubles
- 4 - Doubles
- 5 - Doubles
- 10 - Twins
- 6 - Twins
- 7 - Twins
- 8 - Twins
- 9 - Twins
- 11 - Singles
- 12 - Singles
- 13 - Singles
- 14 - Singles
- 15 - Singles
- 16 - Suites
- 17 - Suites
- 18 - Suites

Click on **Next**

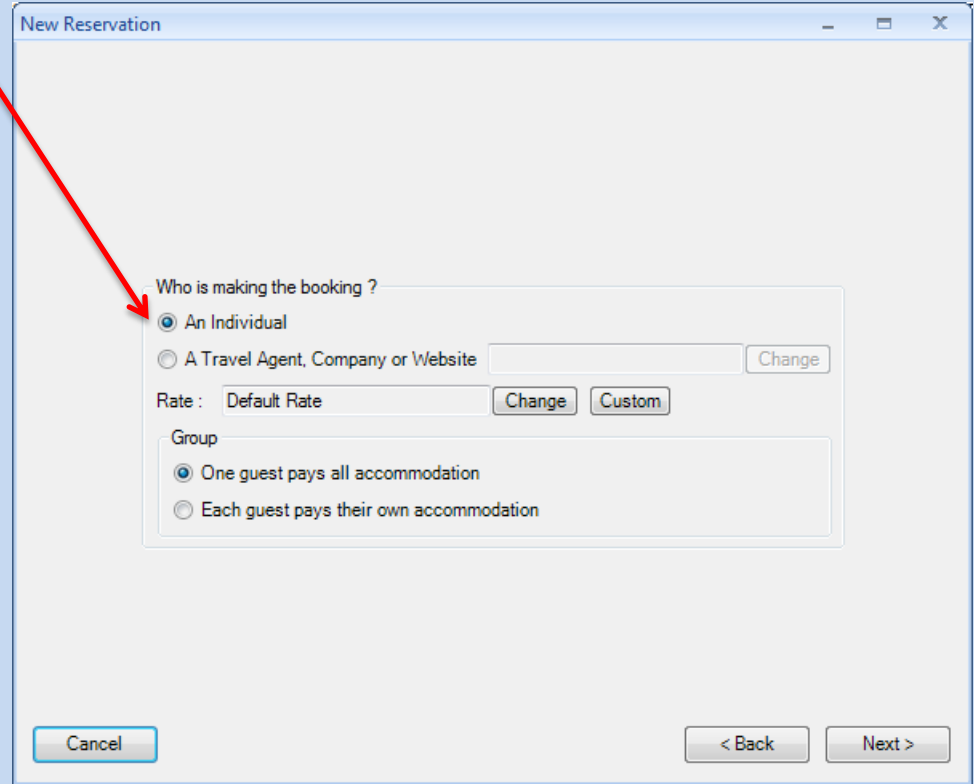
Cancel < Back Next >

Select the entity requesting the reservation.  
An individual or a company?

For **company reservations** a screen with all the companies stored in your database will be displayed (i.e. all travel agents, tour operators, corporate companies and PCO's).

Select the company by scrolling down or by typing the starting letters of the company's name.

**Note:** if the company is not on the list, use the **New** button to create the company.



New Reservation

Who is making the booking ?

An Individual

A Travel Agent, Company or Website

Rate :

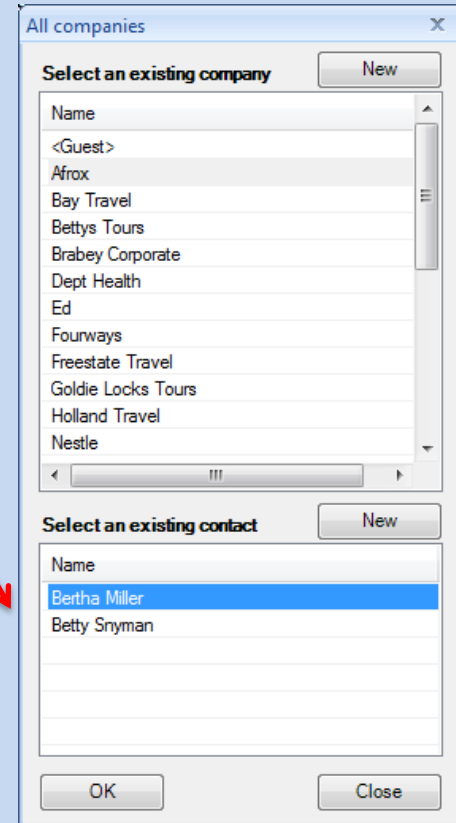
Group

One guest pays all accommodation

Each guest pays their own accommodation

If more than one **contact person** for the company is available, select the person who requested the reservation.

**Note:** if they are not in the list, use the **New** button to create that contact person.



The screenshot shows a dialog box titled "All companies" with a close button (X) in the top right corner. It is divided into two sections:

- Select an existing company:** This section has a "New" button on the right. Below it is a list box containing the following items: <Guest>, Afrox, Bay Travel, Bettys Tours, Brabey Corporate, Dept Health, Ed, Fourways, Freestate Travel, Goldie Locks Tours, Holland Travel, and Nestle. A scrollbar is visible on the right side of the list.
- Select an existing contact:** This section has a "New" button on the right. Below it is a list box containing the following items: Bertha Miller (highlighted in blue), Betty Snyman, and several empty rows.

At the bottom of the dialog box are two buttons: "OK" and "Close". A red arrow points from the text box on the left to the "Bertha Miller" entry in the contact list.

For company reservations. The **default rate** associated with the company will automatically be selected (in this example the Default rate was applied)

Other rates that are valid for the company may be selected by using the **Change** button

Commission % defined for the rate as well as a deposit % required for this company will be applied when the rate is selected.

You may select a **Custom Rate (your own price)** that will apply to this reservation only.

All alterations to the reservation such as date changes, room changes etc. will use this rate when adjusting transactions.

**Note:** NO commission will apply for **Custom Rates** unless recorded for the company.

You can do this after recording the reservation, which will then insert the commission transaction.

Once recorded, all future reservations where the **custom rate** is used will then use the same commission %.

New Reservation

Who is making the booking ?

An Individual

A Travel Agent, Company or Website

Rate :

Group

One guest pays all accommodation

Each guest pays their own accommodation

When an **Individual** requests the reservations (No company involved).

Select the **Rate** that must apply to this reservations

The **default venue rate** will automatically be inserted as the first option.

The rate can be changed by selecting the **Change** button

You may select a **Custom Rate (your own price)** that will apply to this reservation only.

All alterations to the reservation such as date changes, room changes etc. will use this rate when adjusting transactions.

The screenshot shows a 'New Reservation' window with the following elements:

- Who is making the booking ?**
  - An Individual
  - A Travel Agent, Company or Website
- Rate :**
- Group**
  - One guest pays all accommodation
  - Each guest pays their own accommodation

At the bottom of the window are three buttons: , , and .

Two red arrows are present: one points from the text 'The rate can be changed by selecting the Change button' to the 'Change' button next to 'Default Rate'; the other points from the text 'You may select a Custom Rate (your own price) that will apply to this reservation only.' to the 'Custom' button.

If the accommodation must be charged to **one room** (master room), select “One guest pays all accommodation”.

If **each guest** must pay for themselves, select “Each guest pays their own accommodation”.

Click on **Next**

The screenshot shows a 'New Reservation' dialog box with the following elements:

- Who is making the booking ?**
  - An Individual
  - A Travel Agent, Company or Website
- Rate :**
- Group**
  - One guest pays all accommodation
  - Each guest pays their own accommodation

At the bottom of the dialog box, there are three buttons: , , and .

Red arrows from the text boxes on the left point to the 'One guest pays all accommodation' radio button, the 'Each guest pays their own accommodation' radio button, and the 'Next >' button.



Group Details - Folio #3 - Test Group 1

Group Transactions | Group Reservations

	Folio	Room Name	Room Type	First Name	Last Name	Arrival	Departure	Adults	Child1
▶	3	2 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0
	4	3 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0
	5	4 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0

Select All | De-Select All | Copy Down

Available Rooms

Arrival 18 January 2012 | Departure 20 January 2012 | Nights 2 | View by Type | Refresh

Rooming List Report | Add Members | Add Group to Conference

Save | Save & Close | Close

Show Balance  
Guest(s): 0.00  
Company(s): 0.00  
Total: 0.00  
Number of Rooms: 3

This screen will show the details of the group booking. Click on Finished.

The Rooming list screen will open and here you can now see all the rooms in the group. The number of adults and children can be copied down to each booking.

# Group Reservations

There are a few things that can be done on this Rooming list screen. The **availability** can also be checked.

The group can also be **linked to a conference** (already existing in the CMS), by selecting "Add Group to conference".

An **other room** can be added, by selecting "Add members". Select the date and the room and that room will then be added to the list of rooms linked to the group.

A **rooming list report** can also be printed from here.

Group Details - Folio #3 - Test Group 1

Group Transactions | Group Reservations

	Folio	Room Name	Room Type	First Name	Last Name	Arrival	Departure	Adults	Child1
▶	3	2 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0
	4	3 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0
	5	4 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0

Select All | De-Select All | Copy Down

Available Rooms

Arrival 18 January 2012 | Departure 20 January 2012 | Nights 2 | View by Type | Refresh

Show Balance

Guest(s): 0.00  
Company(s): 0.00  
Total: 0.00  
Number of Rooms: 3

Rooming List Report | Add Members | Add Group to Conference | Save | Save & Close | Close

The **balance** for the company and guest can also be show by selecting the box "Show Balance" and scroll to the right.

# Group Reservations

To view the group transactions, go to the "Group Transactions" tab.

Group Details - Folio #3 - Test Group 1

Group Transactions | Group Reservations

	Folio	Room Name	Room Type	First Name	Last Name	Arrival	Departure	Adults	Child1
▶	3	2 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0
	4	3 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0
	5	4 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0

Select All | De-Select All | Copy Down

Available Rooms

Arrival 18 January 2012 | Departure 20 January 2012 | Nights 2 | View by Type | Refresh

Rooming List Report | Add Members | Add Group to Conference

Save | Save & Close | Close

Show Balance  
Guest(s): 0.00  
Company(s): 0.00  
Total: 0.00  
Number of Rooms: 3

On a **group reservation**, there is the option to re-allocate the **accommodation charges** to the master room (who then pays for all the accommodation from that account)

Or to re-allocate them to each room account and each room pays their own accommodation (other extras are never transferred in this way and will always stay on the room account).

On the active room account a message indicates if this room account is paying the accommodation or only for incidentals.

The “Group Re-allocate” button is used to re-allocate accommodation charges to the master room or individual rooms.

Transaction Details - Folio #981 - Zolla Bud on Group Folio #981 - Zolla Bud

Group Reservations Rooming List Group Transactions

Display Transactions  
 Summary  Detailed  
 As Invoice   
 Entire Group  All Accounts

Rate Show History

Billing Accounts  
Zolla Bud - Paying accom for all rooms  
Test Own Website

Re-alloc Split Other **Group Re-allocate**

Deposit Details  
Due Date: 27 March 12  
Deposit Due: 0.00 Perc: 50.00  
Received: -1545.00 Owning: 0.00  
   
 Email  Display

Effective Date	Room	Product	Description	Invoice	Folio #	Allocated to	Qty	Unit Price	Tax	Amount	Use
09 May 2012	1	Bed and ...	Bed and Breakfast	Not Inv...	981	Zolla Bud	24	128.75	379.44	3090.00	n/a
09 May 2012	1	Internet CC	Deposit - Intern...	Not Inv...	981	Zolla Bud	1	-1545.00	0.00	-1545.00	Luc
		Charges				Zolla Bud				3090.00	
		Payments				Zolla Bud				-1545.00	
		Expenses				Zolla Bud				0.00	
		Invoiced				Zolla Bud				0.00	

Zolla Bud  
Pro-formas  
  
 Email  Display

Invoices  
  
 Email  Display

Charge (Sale) Payment (Receipt) Expense (C.O.S)

Correspondence Documents  
Invoices: Guest=0 Company=0

Generate Room Charges

Balances  
Zolla Bud: 1545.00  
All Guests: 1545.00  
All Companies: 1236.00  
Total (All Accounts): 2781.00

Edit Reverse Refund

Confirmed

Close



Manage Groups

Arrival Date	Group Name	Booked By	Payment Responsible	
2012/01/18	Test Group 1			

Show future dated only

On this screen a list of all your groups will be **displayed**. From here you can **cancel** the entire group, **go to** the rooming list, group reservations or group transaction screens.

The Group reservation screen is used when you wish to effect changes **to the entire group**.

Once a change is made, select the Change button to activate the change for all reservations in that group.

The colours for the entire group can also be customized here.  
A group can also cancelled here and the correspondence documents can be accessed from here.

The screenshot shows the 'Group Details' window for 'Folio #3 - Test Group 1'. It features several sections: 'Group Transactions' and 'Rooming List' tabs; 'Folio' (3) and 'Name' (Test Group 1) fields with 'Change' buttons; 'Type' (Normal Reservation) dropdown with 'Change' button; 'Change Group Colour' section with 'F', 'B', 'Reset', and 'Change' buttons; 'Booked By' section with fields for 'Booked By', 'Contact', 'Tel No', and 'Email', each with 'Change', 'More', and 'New' buttons; 'Payment Responsibility' section with similar fields and buttons; 'Rooms' (3), 'Child2' (0), and 'Child3' (0) fields; 'Int. Tour Operator' dropdown with 'Change' button; 'Change remarks' button; 'Add Members', 'Rooming List Report', 'Correspondence Documents', and 'Cancel Entire Group' buttons; and a 'Provisional' dropdown with a 'Close' button. Red arrows point from the text boxes to the 'Change' buttons, 'Change Group Colour' section, 'Cancel Entire Group' button, and 'Change remarks' button.

The **Rooming List** screen is used to manipulate one or more reservations that form part of a group.

You can type information directly in the grid (e.g. insert the guest name) or change dates or pax for individual bookings.

You can also right-click once you highlight one or more reservations and a menu of options will be displayed.

To highlight a single reservation, click on the reservation.

For multiple selections use your shift key (hold it down) for a block of reservations or the Ctrl key to select multiple individual reservations.

The screenshot displays the 'Group Details - Folio #3 - Test Group 1' window. It features two tabs: 'Group Transactions' and 'Group Reservations'. The 'Group Reservations' tab is active, showing a table with the following data:

	Folio	Room Name	Room Type	First Name	Last Name	Arrival	Departure	Adults	Child1
▶	3	2 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0
	4	3 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0
	5	4 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0

Below the table are buttons for 'Select All', 'De-Select All', and 'Copy Down'. Underneath is the 'Available Rooms' section with fields for 'Arrival' (18 January 2012), 'Departure' (20 January 2012), and 'Nights' (2). At the bottom right, it shows 'Total: 0.00' and 'Number of Rooms: 3'. A context menu is open over the first row, listing options: 'Open Reservation', 'Edit Guest', 'Change Guest', 'Change Dates', 'Remove from calendar (unallocated)', 'Move Reservation', 'Remove from group', 'Make this the Master Room', and 'Cancel'. Red arrows point from the text in the blue box to the first row of the table and the context menu.



Group Details - Folio #3 - Test Group 1

Group Transactions | Group Reservations

	Folio	Room Name	Room Type	First Name	Last Name	Arrival	Departure	Adults	Child1
▶	3	2 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0
	4	3 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0
	5	4 - Doubles	Doubles		Test Group 1	2012/01/18	2012/01/20	2	0

Open Reservation  
Edit Guest  
Change Guest  
Change Dates  
Remove from calendar (unallocated)  
Move Reservation  
Remove from group  
Make this the Master Room  
Cancel

Select Dates

Arrival : 18 January 2012  
Departure : 20 January 2012  
Select

Select All | De-Sele

Available Rooms

Arrival 18 January 2012 | Departure 20 January 2012 | Nights 2 | View by Type | Refresh

Rooming List Report | Add Members | Add Group to Conference | Save | Save & Close | Close

Show Balance  
Guest(s): 0.00  
Company(s): 0.00  
Total: 0.00  
Number of Rooms: 3

If the entire groups dates need to be **changed**, this must also be done on the rooming list screen.

**Click** on "Select All" – this will highlight all the rooms.

**Right click** and click on change dates.

Select the new dates and click on Select.

End of training module