catering & event management software

Training Guide

Managing Your Rooms in Guestrooms Manager

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Unit 1: Setting Up Your Guestrooms Manager

The Guestrooms Manager add-in to Caterease is the place to go when you want to book a new sleeping rooms contract for a new function or when you want to edit or review an existing sleeping room contract. You can also generate numerous prints from Guestrooms Manager, including the Rooms Contract; Contract (with Event Details); Group Rooms Control Log; Guestroom Breakdown; Deposits Due; Payments Made; and Accounts Receivable.

The Guestrooms Manager has three display tabs: General, Miscellaneous, and Comments. The General tab allows you to view or edit any general event information, such as party name, theme, guest count, arrival or departure date, etc. The Miscellaneous tab is where you can enter more specific event details, such as Method of Reservation, Pay Method, Reservation Cut-Off Date, and Contract Return Date. The Comments tab provides a place to store any comments and/or notes related to the guestrooms booking.

As with the other Managers in the program, the Guestrooms Manager makes use of the Caterease toolbars at the top of the screen. Buttons on these toolbars enable you to add or delete group bookings, search for a particular group rooms booking, navigate quickly from one booking to another, and perform other important functions.

The first section of this booklet discusses Guestrooms Manager setup functions, and the remaining sections outline the Guestrooms Manager module and its features.

Objectives:

Upon completing this unit, you will be able to:

- *Add a new sleeping room.*
- *Assign rates to a sleeping room.*
- *Establish extended room rates.*
- *Establish a daily and monthly inventory.*
- *Establish tax rates and other miscellaneous settings.*

Adding a New Guestrooms Type in Guestrooms Manager

You can quickly and easily store all of your guestroom types and their corresponding rates into the Guestrooms Manager module. The Guestrooms Manager Setup screen, pictured on the following page, allows you to enter all of the sleeping room types your facility offers, along with regular and special (seasonal or promotional) rates. Once the room types are entered, all you will need to do is retrieve them whenever you book a guestrooms contract.

Adding a New Guestrooms Type

1. Access the Guestrooms Manager Setup form by first clicking the **Administration** ribbon tab, located at the top of your screen.

2. Next, click the **Options** button and choose **Guestrooms Mgr Setup**.
   Result: *The Guestrooms Manager Setup window opens, with the **Room Type** tab selected by default.*

3. Click the **Add Room Type** button, located on the upper right-hand side of the window.
   Result: *A blank line is added to the bottom of the list.*

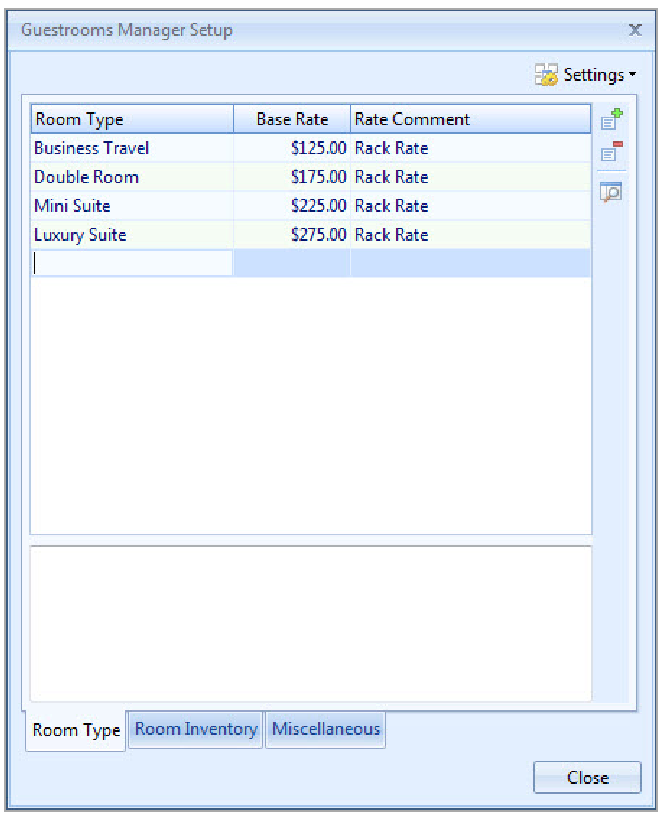
4. Type a name for the room type into the Room Type field.

5. Press your **[Enter]** key to move to the next field.

6. Type a base room rate into the Base Rate field, and press **[Enter]**.

7. **[Optional]** Type a comment into the Rate Comment field.

8. Repeat steps 3 through 7 to add more room types/room rates.



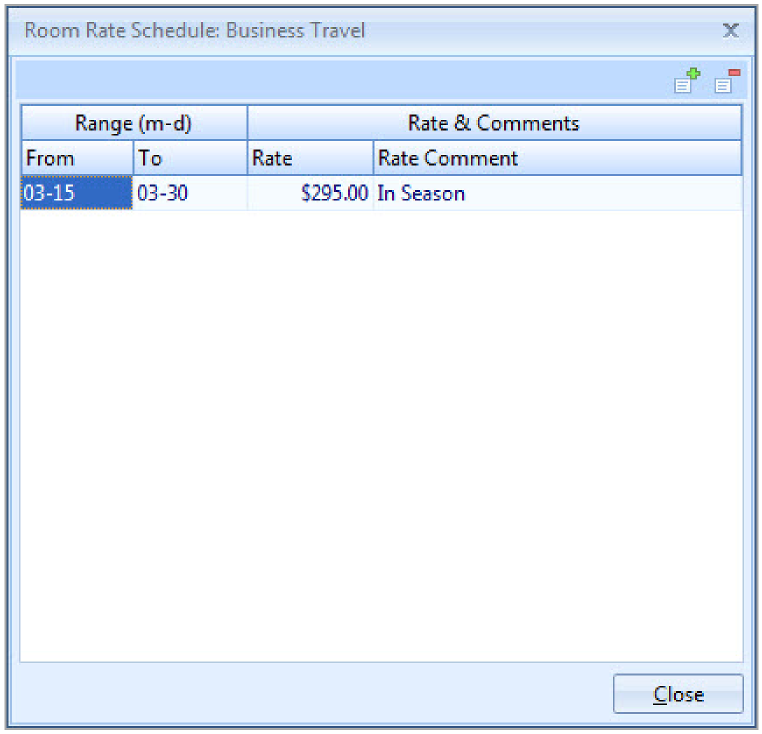
9. When finished adding Room Types, click **Close**.

Establishing Extended or Seasonal Room Rates

Not only can you establish base or "rack" rates for your rooms, but you can even create special rates for any date range during the year.

1. Access the Guestrooms Manager Setup form by first clicking the **Administration** tab.
2. Next, click the **Options** button and choose **Guestrooms Mgr Setup**.
   Result: *The Guestrooms Manager Setup window opens, with the* ***Room Type*** *tab selected by default.*
3. Click on the Room Type for which you want to establish an extended/seasonal rate.
4. Click the **Show Extended Room Rates** button , located on the upper right-hand side of the window.
   Result: *The Room Rate Schedule window opens.*
5. Click the **Add Rate** button , located on the upper right-hand side of the window.
6. Type a start date for the new rate into the From field, and press your **[Enter]** key to move to the next field.
7. Type an end date for the new rate into the To field, and press **[Enter]**.
8. Type the extended rate into the Rate field, and press **[Enter]**.
9. **[Optional]** Type a rate comment, such as "Seasonal," "Weekend," etc., into the Rate & Comments field.
10. Repeat Steps 5 - 9 to add additional extended/seasonal room rates.

11. Click **Close** when finished adding extended rates.

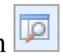


Establishing Inventory in Guestrooms Manager

You can establish a daily or monthly inventory of sleeping rooms and have Caterease automatically flag you if you attempt to book more sleeping rooms than you have available.

Establishing a Daily Inventory

1. Access the Guestrooms Manager Setup form (**Administration** > **Options** > **Guestrooms Mgr Setup**).
2. Click the **Room Inventory** tab, located at the bottom of the form.
3. Click the down arrow on the **Settings** button, located at the top right-hand side of the form.
4. Select **Room Inventory** and then choose **Daily**.
5. Choose a month and year (top right of the display) to set a daily inventory for.
   Note: *The current month and year display as a default. Use the up-and-down arrows to adjust the month and year.*

6. Click the **Daily Inventory Review** button  , located on the right-hand side of the screen.
   Result: *An Inventory window opens, showing the daily inventory for the currently selected month.*

7. Click the **Select Room Types** button , located at the top left-hand side of the form.
   Result: *The Select Room Type window opens, with your current list of room types.*

8. Highlight a room type, or select several by dragging your mouse over them or holding your **[Ctrl]** key as you click.

9. Click the **Select** button.
   Result: *The selected room types are added to the daily inventory window.*

10. Click the X at the top of the window to close the Select Room Types window.

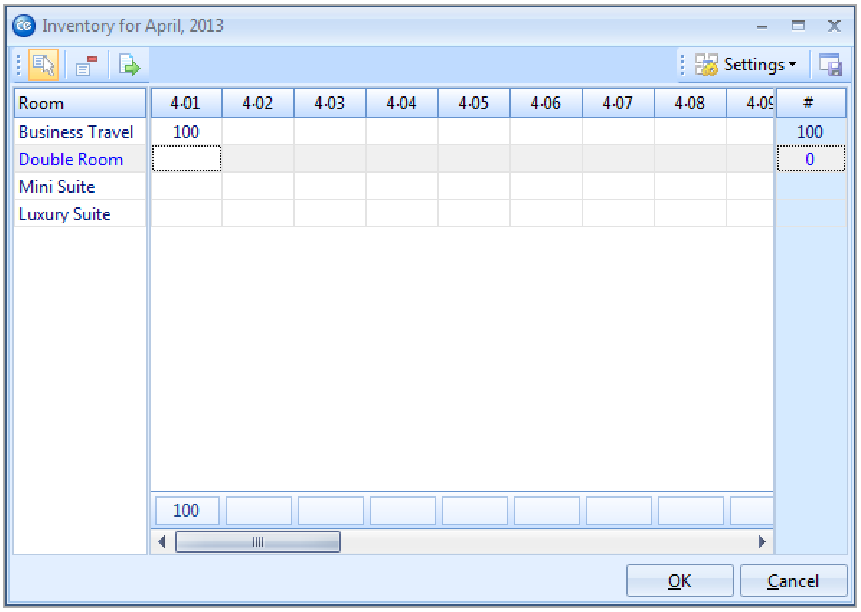
11. Click into the first date column and type a number for your inventory for that day.

12. Press **[Enter]**.
    Result: *Your cursor moves to the column for the next day, and the total number of rooms in inventory for the month are displayed in the column at the far right of the window.*

13. Repeat for other dates and room types.

    Note: *You may click the **Copy Day to Entire Month** button*  *to populate the other days of the month.*

14. When finished, click **OK**.
    Result: *The window closes and your work is saved.*



Establishing a Monthly Inventory

1. Access the Guestrooms Manager Setup form (**Administration** > **Options** > **Guestrooms Mgr Setup**).

2. Click the **Room Inventory** tab.

3. Click the down arrow on the **Settings** button, located at the top right-hand side of the form.

4. Select **Room Inventory** and then choose **Monthly**.

5. Choose a month and year (top right of the display) to set an inventory for.

6. Click the **Select Room Types** button .
   Result: *The Select Room Type window opens.*

7. Highlight a room type, or select several by dragging your mouse over them or holding your **[Ctrl]** key as you click.

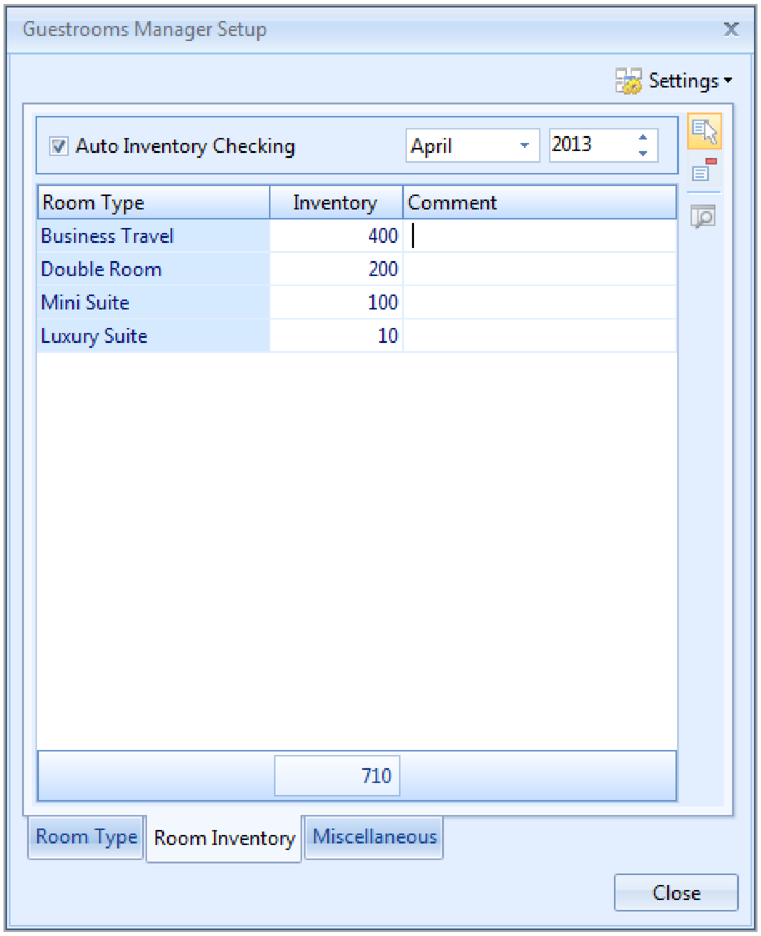
8. Click the **Select** button.
   Result: *The selected room types are added to the inventory window.*

9. Highlight room types to set inventory for.

10. Click into the <u>Inventory</u> column and enter a number for that room type for the month.

11. Repeat for each room type.

12. **[Optional]** Enter comments for each room type's inventory into the Comment field.



Establishing Miscellaneous Guestrooms Settings

There are two different options addressed on the Miscellaneous tab of your Guestrooms Manager Setup screen. First, you can establish up to four separate categories of billable items and then determine from within each guestrooms contract which account should be billed: individual account or master account. Second, you can set your default room tax rates directly from this screen.

Establishing Miscellaneous Settings

1. Access the Guestrooms Manager Setup form (**Administration** > **Options** > **Guestrooms Mgr Setup**).
   Result: *The Guestrooms Manager Setup window opens.*

2. Click the **Miscellaneous** tab, located at the bottom of the window.

3. Click into the first field under **Billable Items**.

4. Type a name of your first billable item category, and press **[Tab]** or **[Enter]** to move to the next field.

5. Repeat for other billable items, continuing to press **[Tab]** or **[Enter]** to move to the next field.

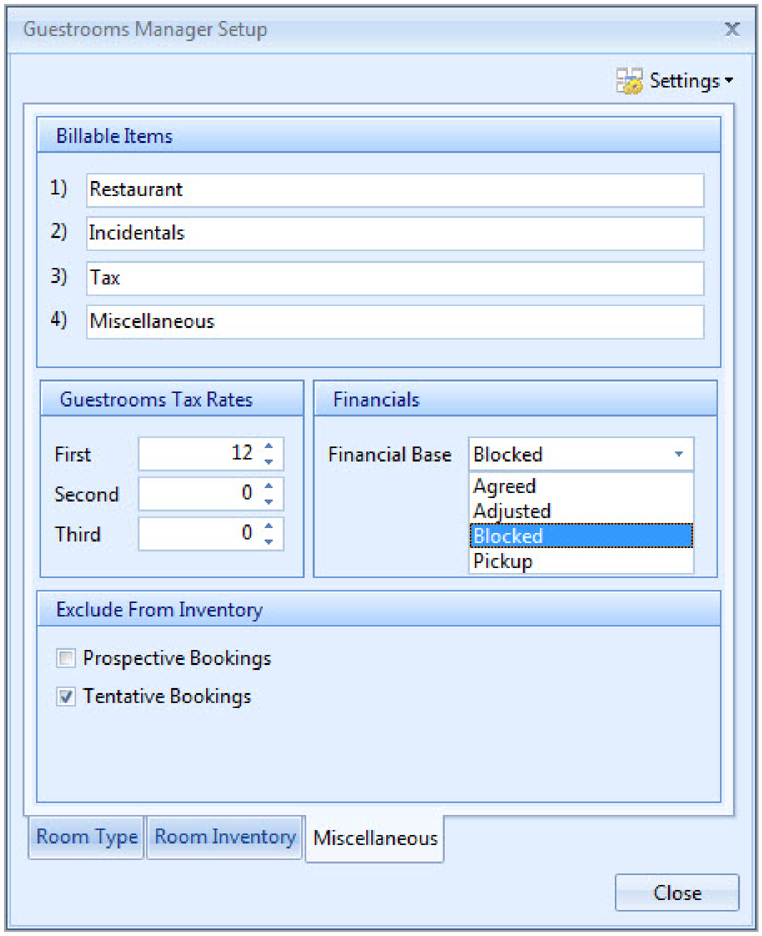
6. Type a default tax rate as desired, into the **Guestrooms Tax Rate** area, or use the up-and-down arrows to raise or lower the rate one percentage point or one-hundredth (.01) of a percent.

7. **[Optional]** Add Second and Third tax rates, if desired, by typing directly into the fields or by using the up-and-down arrows to make adjustments.

8. Click the down arrow to the right of the Financial Base field, under the **Financials** section, and select an option.
   Note: *Four columns or room totals (Agreed, Adjusted, Blocked, and Pickup) can be optionally displayed for each date of your rooms contract. Any one of these numbers can be used as the financial base for those contracts.*

9. **[Optional]** Click the checkboxes under **Exclude From Inventory** to have Caterease ignore any bookings with a status of Prospective Bookings or Tentative Bookings when calculating room inventory.

10. When finished, click **Close**.



A description of the available Financial Base fields is provided below:

Field	Description
Agreed	The number of sleeping rooms you and your customer agree upon for the contract.
Adjusted	An adjusted number when a change is applied to your agreed count (for example, when a customer requests a reduction in the number of rooms).
Blocked	The number of sleeping rooms you block for the customer.
Pickup	The number of sleeping rooms the customer actually uses.

Unit 2: Using the Guestroom Manager Features

Objectives:

Upon completing this unit, you will be able to:

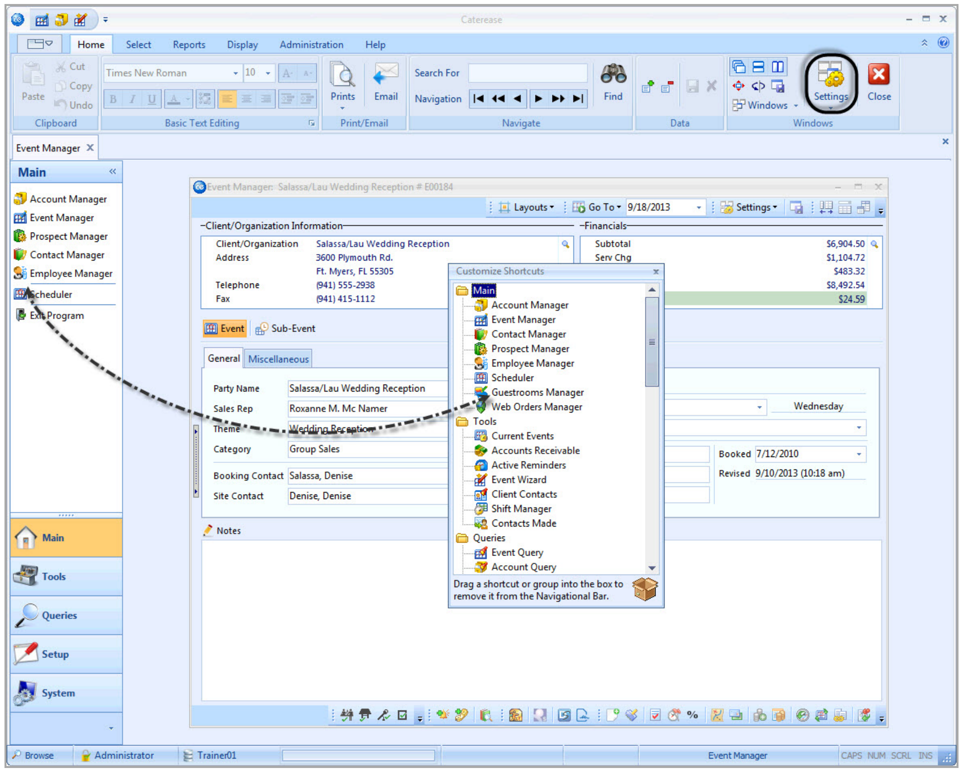
- *Access the Guestrooms Manager module.*
- *Create a Guestrooms Manager shortcut on your Desktop.*
- *Locate an account using the Group Booking Finder tool.*
- *Fill out the Guestrooms Manager tabs.*
- *Enter billing and payment information.*

Accessing Guestrooms Manager

You can quickly and easily add the Guestrooms Manager module to your screen by following the steps below.

1. Click the **Select** ribbon tab at the top of your screen.
2. Click the **More** button, located on the top left-hand side of the screen, within the **Main** section.
3. Select Guestrooms Manager from the drop-down list.
   Result: *The Guestrooms Manager module opens.*
4. **[Optional]** To add the Guestrooms Manager icon to the toolbar panel (for easy access to the program), right-click within the **Main** sidebar area and choose **Customize Shortcuts**.
   Result: *The Customize Shortcuts window opens.*
5. Hold your left mouse button down on the **Guestrooms Manager** icon, from the **Customize Shortcuts** window, and drag over to the **Main** panel.

6. Release your mouse button.



7. To save the Guestrooms Manager program to your Desktop, click the **Settings** button at the top right-hand side of the screen.

8. Next, click **Save** and choose **Desktop**.
   Result: *A confirmation message appears.*

9. Click **Yes** to confirm your choice.
   Result: *An informational message appears.*

10. Click **OK**.

Using the Group Booking Finder Tool

The Group Booking Finder feature is a powerful tool to locate existing group bookings in your program. You can search by various criteria, you can search in a backward or forward direction from your current position, and you can even display a list of all records that match your search.

1. Open Guestrooms Manager.

2. Click the **Find** button, located on the main toolbar at the top of your Guestrooms Manager screen.
   Result: *The Group Booking Finder window opens.*

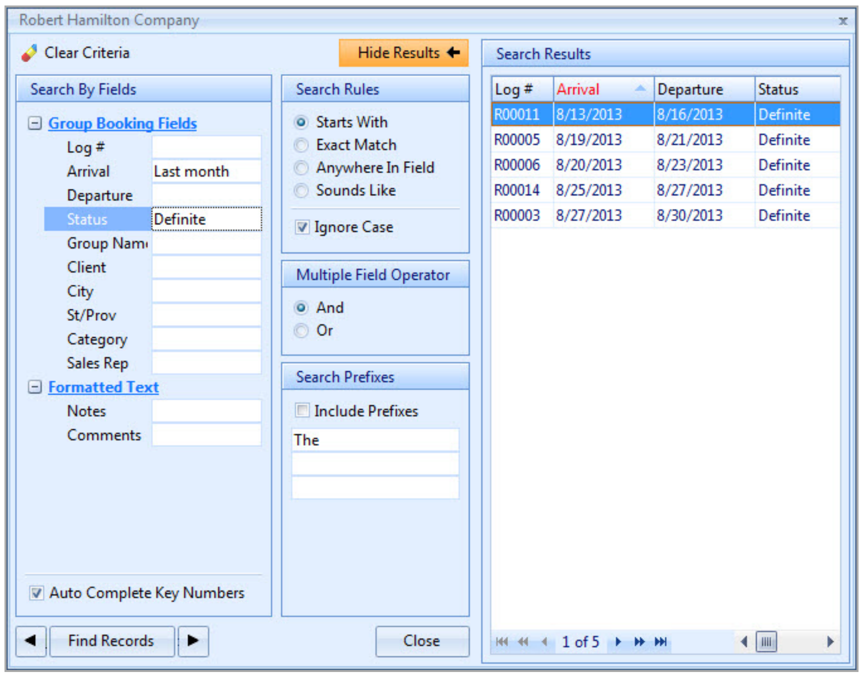
3. In the **Search by Fields** area, type the text you would like to search for. ***Note:*** *You may search by more than one field. Many fields have a corresponding drop-down list of quickpick items from which to choose.*

4. In the **Search Rules** area, select the appropriate rule. ***Note:*** *Confirm that "Ignore Case" is selected if you do not want to worry about capitalization.*

5. **[Optional]** Click the radio button next to And or Or, located in the **Multiple Field Operator** section, if you are searching by multiple search criteria.

6. **[Optional]** Click the **Include Prefixes** checkbox if you would like to include prefixes in your search, and type the prefixes (such as A, An, or The) into the fields provided.

7. Click the **Find Records** button, located at the bottom of the window.



8. **[Optional]** If you accidentally skip over the record you want, and you do not have the Show Results window open, click the **Prior Match** button  on the lower left-hand side of the window to search backward through the records you have found. Click the **Next Match** button  to move forward.

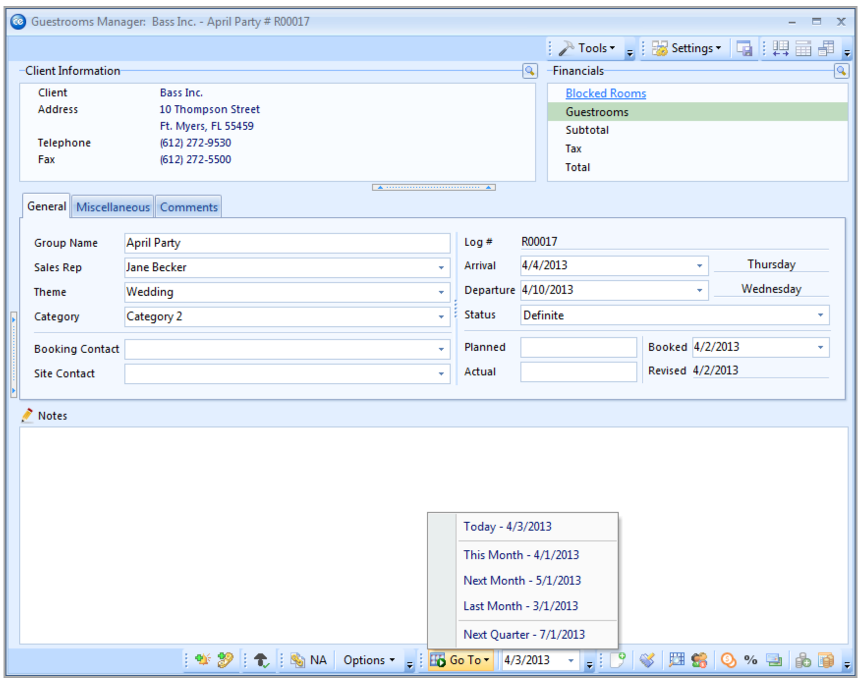
9. Click the **Show Results** button at the top of the Group Booking Finder tool to display a list of all records your search has found thus far.

10. Once your record has been located, click **Close**.

Using the Go To Tool in Guestrooms Manager

You can easily locate records, based on date, using the Go To Tool in Guestrooms Manager.

1. Open Guestrooms Manager.
2. Click the **Go To** button at the bottom of your screen.
3. Choose to go to the first room contract booked for today, this month, next month, last month, or next fiscal quarter.
   Result: *You are moved to the first room contract on your chosen date.*
   Note: *When you use the Go To tool, Caterease automatically re-sorts your room contracts by Arrival Date. Thus, if the first record on a given day is not the one you want, simply use your navigation buttons at the top of the screen to scroll ahead to the desired record.*



Adding a New Guestrooms Contract

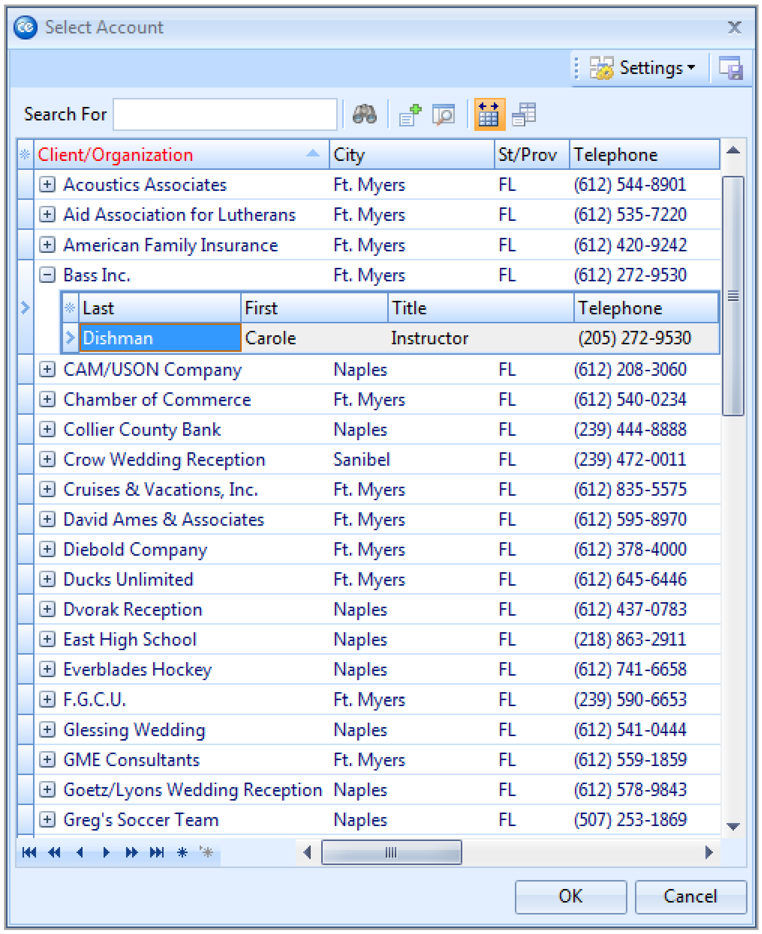
If you wish to add a new rooms contract for a new customer, that means you have never done any business with that customer before; that company's information has not yet been entered into Caterease. If, however, your new contract is for an existing customer, that company's information is already in the program - you need only retrieve it. Once the details of a particular client have been entered into Caterease, you never have to type them a second time.

Adding a New Guestrooms Contract

1. Open Guestrooms Manager.

2. Click the **Add Record** button , located at the top right-hand side of your Guestrooms Manager screen.
   Result: *A confirmation message appears.*

3. Click **Yes** to confirm your choice.
   Result: *The Select Account window opens.*



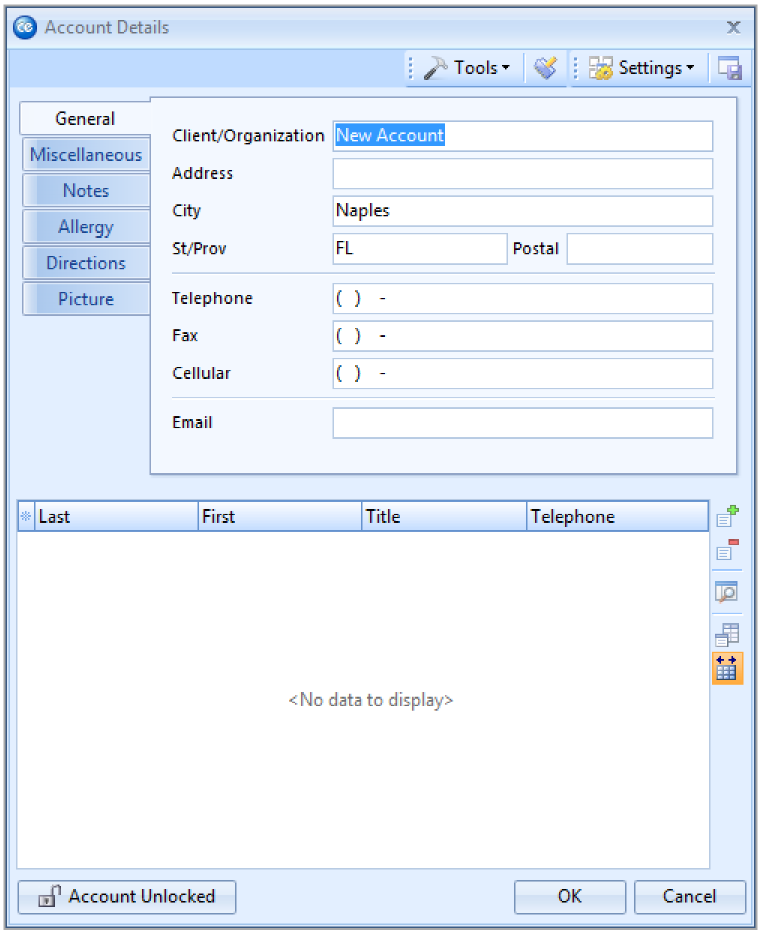
Adding a New Account

1. At the top of the Select Account window, towards the middle, click the **Add New Account** button .
   Result: *A confirmation prompt appears.*

2. Click **Yes** to confirm your choice.
   Result: *The Account Details window opens.*

Entering New Account Information

1. Type the name of your new account (customer) into the Client/Organization field.
2. Press your **[Enter]** or **[Tab]** key to move to the next field.
3. Continue to fill out the fields as desired, pressing **[Enter]** or **[Tab]** after each one to move to the next field.
4. When finished, click **OK**.



Adding Contacts to an Account

1. Click the **Add A New Contact** button , located at the lower right of the Account Details form.
   Result: *The Contact form opens.*
2. Type the last name of the new contact person into the Last Name field.
3. Press your **[Enter]** or **[Tab]** key to move to the next field.

4. Continue to fill out contact information as desired, pressing your **[Enter]** or **[Tab]** key to move from field to field.

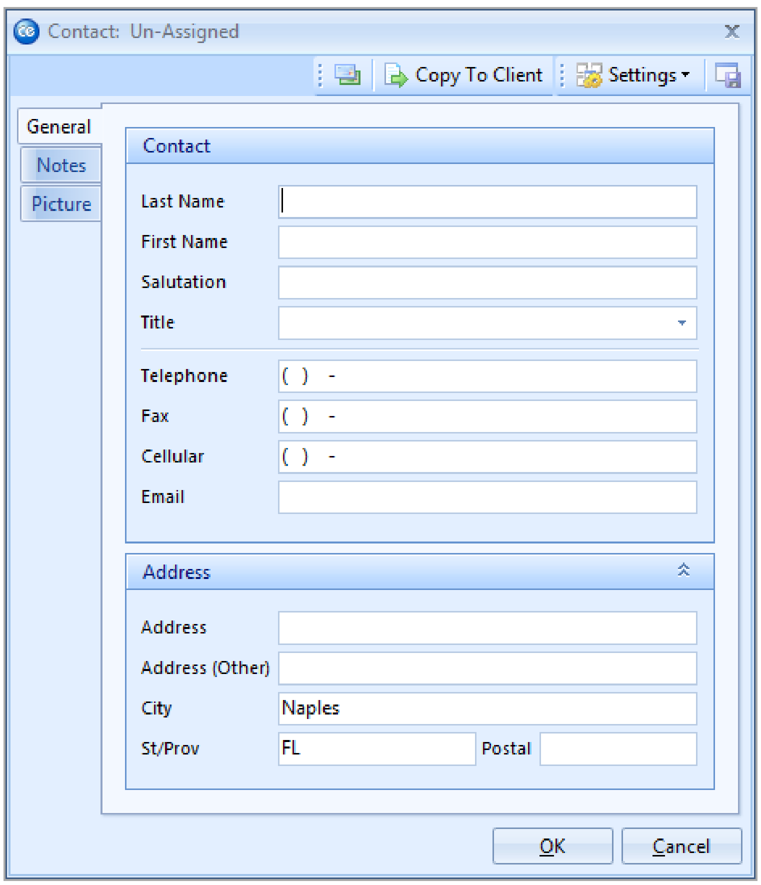
5. In quickpick fields such as Title, click the down arrow at the right of the field and pick an option from the corresponding list.

6. **[Optional]** Click the **Credit Card Information button,** select a credit card from the quickpick list, and type in the remaining credit card information.

7. **[Optional]** Click on the **Notes** tab and type any notes pertinent to this particular contact person. These notes do not print anywhere; they are merely provided for your reference. You can format the text you enter into the **Notes** text block by clicking your right mouse button and choosing **Font**.

8. **[Optional]** Click on the **Picture** tab, click your right mouse button, and select **Load From File** if you want to include a digital image of this contact person or another image, such as a logo.

9. When finished, click the **OK** button at the bottom of the form to close the form and save your changes.



Entering General Rooms Contract Information

Whether adding a new guestrooms booking or editing an existing one, the data-entry process is simple. The topics below will help you enter data in the General display of Guestrooms Manager.

Filling Out General Rooms Contract Information

1. On the Guestrooms Manager screen, retrieve the rooms booking you wish to edit, or add a new one.
   Note: *Remember, this screen can be completely redesigned to suit your needs and preferences.*

2. Click into the first field on the **General** tab.

3. Edit each field using the following guidelines, pressing the **[Enter]** key to move from one field to the next:

   - For fields such as Group Name or guest number fields (Planned/Actual), simply click into the field and type.

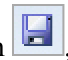
   - For fields with associated drop-down quickpick lists (Sales Rep, Theme, Reference, Category, etc.), click the down arrow at the right of each field and just click a selection from the list.

     Note: *As an alternative to clicking the down arrow, simply begin typing into a quickpick field. The quickpick list will automatically scroll to match what you type.*

   - For date fields, type a date or click the down arrow at the right of the field to access the drop-down calendar.
     Note: *Date fields in the Caterease Professional version offer Smart Date Editing, allowing you to type words such as "today," "tomorrow," "Monday," "EOM" (end of month), even "EOM+1," etc., directly into the field.*

   - If you did not select a default contact person when you created the event, you can retrieve one now by clicking the down arrow next to the Booking Contact or Site Contact field and then clicking the **Select Contact from File** button .
     Note: *If the name you want is not available in this window, you can type it directly into your Guestrooms Manager screen and then add it for future use to the list of contacts associated to the current account by clicking the **Add Contact to File** button* .

4. **[Optional]** Enter general notes pertaining to the rooms booking contract in the **Notes** text block at the bottom of the display.

5. Click the **Save** button , located at the top right-hand side of the screen.

Filling Out Miscellaneous Information

1. Click the **Miscellaneous** tab, located to the right of the **General** tab, in Guestrooms Manager.

2. Enter a Business Type, Operation, Reference, and Pay Method by typing into the fields provided or by clicking the down arrow to the right of the field and selecting from the corresponding drop-down (quickpick) lists.

3. **[Optional]** Fill in the **Optional Billing Information** by typing into the fields provided.
   Note: *These fields might be used if someone else is paying for the guestroom other than the person who is listed on the account.*

Adding or Removing a Field

1. Click your right mouse button on the names of any field on the **General** or **Miscellaneous** tabs.

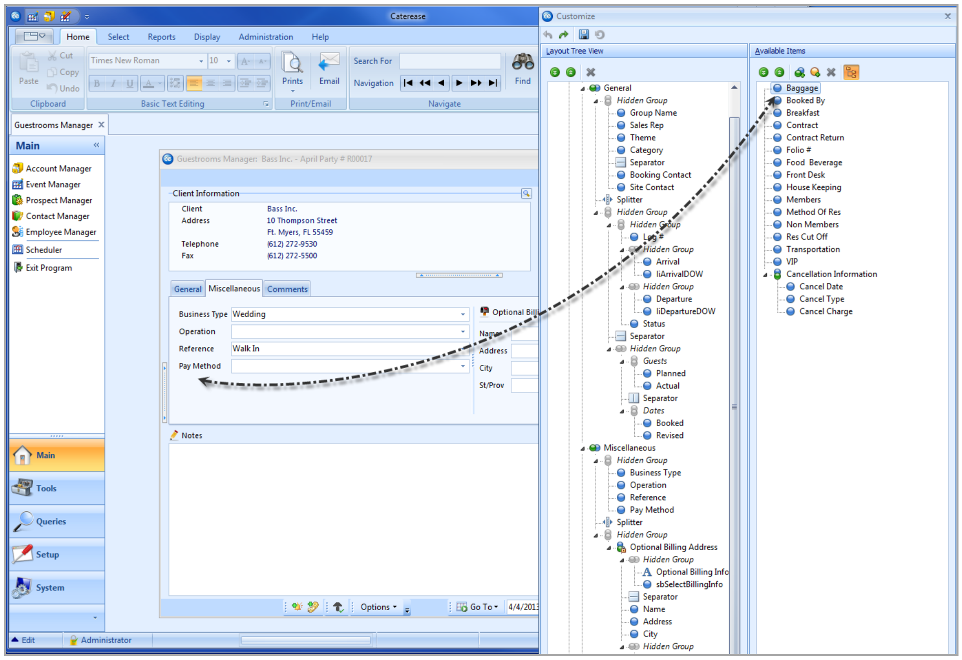
2. Select **Customize.**

3. Drag that field name into the Available Items window to remove a field from the screen; drag an item from the Available Items pane onto your screen to add a field.

4. Repeat as desired to add or remove fields.

5. Click **Close** when finished.

   Note: *Remember to click the* ***Save Current Window Settings*** *button*  *if you wish to set this as your new default arrangement.*



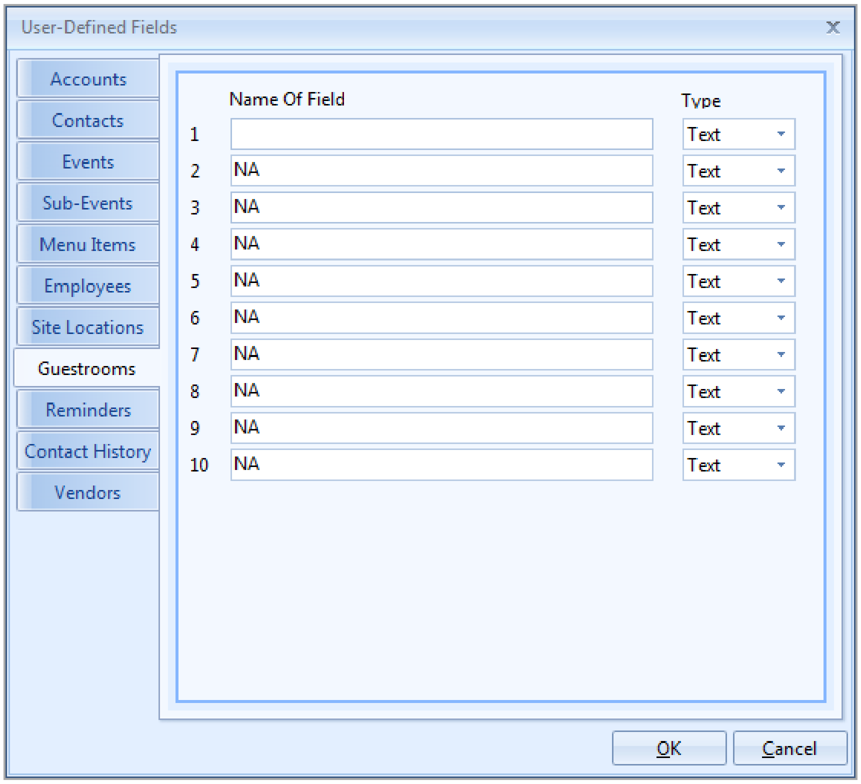
Creating User-Defined Fields

A User-Defined field is one that is created by the user of the software. If there is a need for a new information field that does not exist in the Caterease database, the user may create the field. These fields are searchable and can be tracked via various reports, contracts, and documents. There are 10 available fields in the Guestrooms Manager.

1. Click the **Setup** sidebar area.and choose **User Defined Fields**.
2. Click on the **Guestrooms** tab, located on the left-hand side of the window.
3. Click on the first available field and type in your description of that field.
4. Click the down arrow under <u>Type</u> to format the new field using the following guidelines:
   - **Text:** alpha numeric format
   - **Phone:** formatted for phone number entry
   - **Number:** formatted for numbers only
   - **Currency:** formatted for currency
   - **Date:** formatted for date entry
   - **Time:** formatted for time entry

6. When finished adding user-defined fields, click **OK**.

7. Add the user-defined field to your screen by following the steps outlined in the "Adding or Removing Fields" section, above.

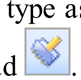


Using the Comments Tab

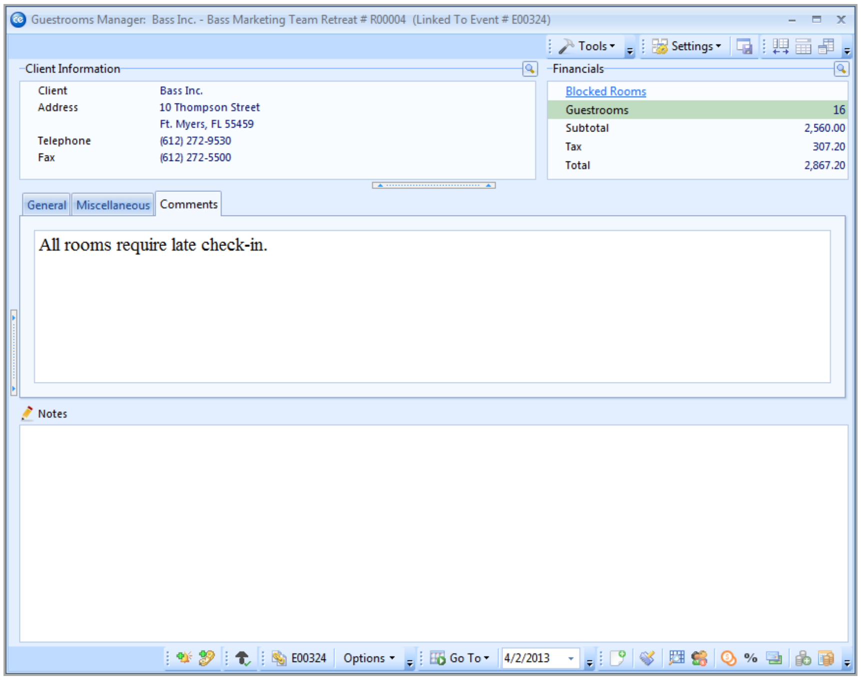
The **Comments** tab in Guestrooms Manager is a place for you to enter the general special requests of your customers. You can choose to either suppress or display these comments on your prints.

1. In Guestrooms Manager, retrieve the guestrooms contract you wish to edit, or add a new one.

2. Click the **Comments** tab.
   Result: *Two text blocks display, one for Comments and one for Notes.*

3. Click into either large white text block and type as desired, or retrieve commonly used comments using the Scratch Pad .

4. Highlight any text and format it using the **Format** toolbar from the **Basic Text Editing** section at the top of your screen.



Copying Comments from the Scratch Pad

The Scratch Pad tool is used to store and reuse commonly used text so you do not have to type the same details over and over; you can simply insert existing text.

1. From the **Comments** tab in Guestrooms Manager, click into the area (Comments or Notes) where you would like the text to appear.

2. Click the **Scratch Pad** button , located at the bottom of the screen. ***Result:*** *The Scratch Pad window opens.*

3. Click the desired category on the left-hand side of the window. Highlight, from the right-hand side of the window, the text you want to copy, and then click the **Insert Text** button.

4. Format the text by using the **Format** toolbar at the top of the screen or by highlighting the text, right-clicking, and selecting **Font**.

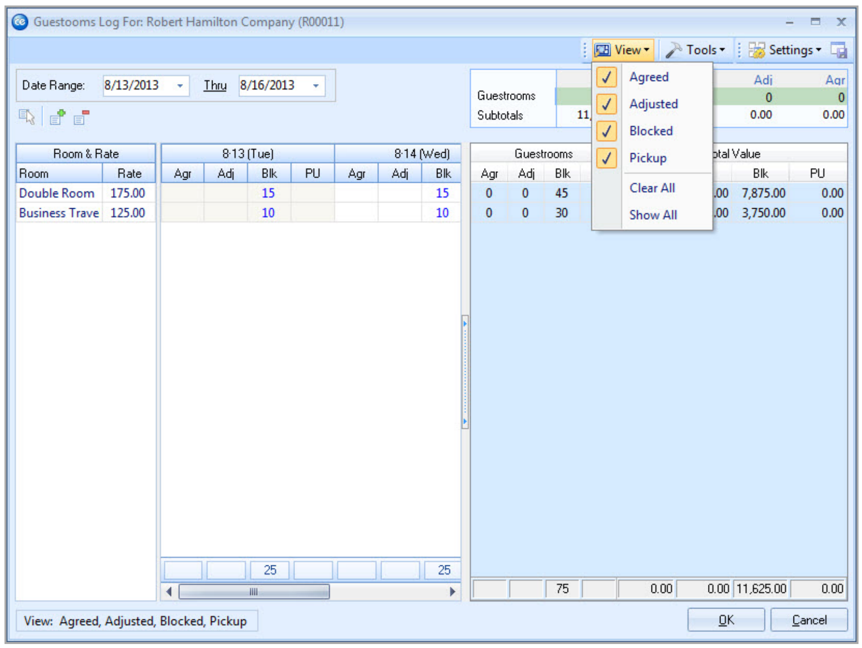
Adding Sleeping Rooms to the Guestrooms Contract

Sleeping rooms can be quickly and easily be added in your Guestrooms Manager via the Guest Log.

Adding Guestrooms to the Contract

1. Open Guestrooms Manager.

2. Click the **Guest Log** button , located at the bottom of the Guestrooms Manager screen.
   Result: *The Guest Log window for the current contract opens.*
   Note: *Four columns of rooms totals (Agreed, Adjusted, Blocked, and Pickup) can optionally be displayed for each date of your rooms contracts. To change options, click the* ***View*** *button and select from the drop-down list.*



3. Click the **Select Room Types** button , located on the left-hand side of the Guest Log window.
   Result: *A list of your optional room types appears.*

4. Retrieve sleeping rooms into your contract. **Note:**

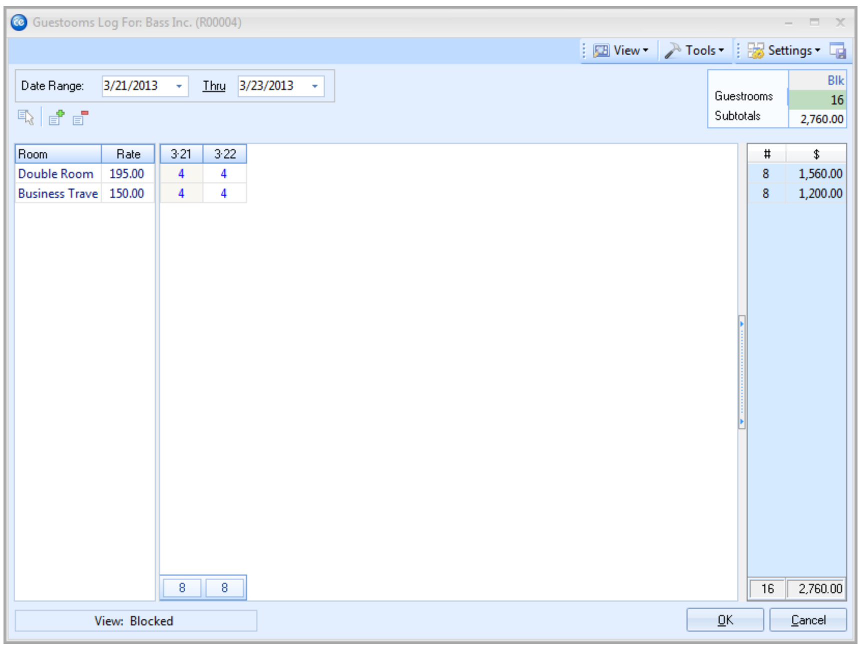
   - Holding your left mouse button down and dragging over several room types allows you to select more than one at a time.

   - Holding down the **[Ctrl]** key on your keyboard and clicking several room types allows you to select non-contiguous types.

   - Clicking **OK** inserts the currently selected room types and closes the window.

- Clicking and holding your mouse button down on the last room type in a group allows you to drag those room types from the window onto your Guest Log form.
- Clicking **Select** inserts the currently selected items and leaves the Select Room Types window open.

5. Click into the first date column for the first room you have retrieved and enter a quantity of rooms for that date.
6. Press **[Tab]** or **[Enter]**.
   Result: *Your cursor moves to the next date column, and calculations are performed at the top right of the Guestrooms Log window.*
7. When finished, click **OK**.
   Result: *The Guest Log window closes, and financial totals for your contract are updated.*



Creating a Rooming List in Guestrooms Manager

The rooming list is provided to the hotel so the hotel can assign rooms within the room block before guest arrive on-site.

Creating a Rooming List

1. Open Guestrooms Manager.

2. Click the **Rooming List** button , located at the lower right-hand side of the screen.
   Result: *The Rooming List window opens.*

3. Click the **Add Guest** button , located on the upper right-hand side of the window.
   Result: *A blank line is added to the bottom of the list.*

4. Enter the last name of the guest into the Last field, and press **[Tab]** or **[Enter]** to move to the next field.

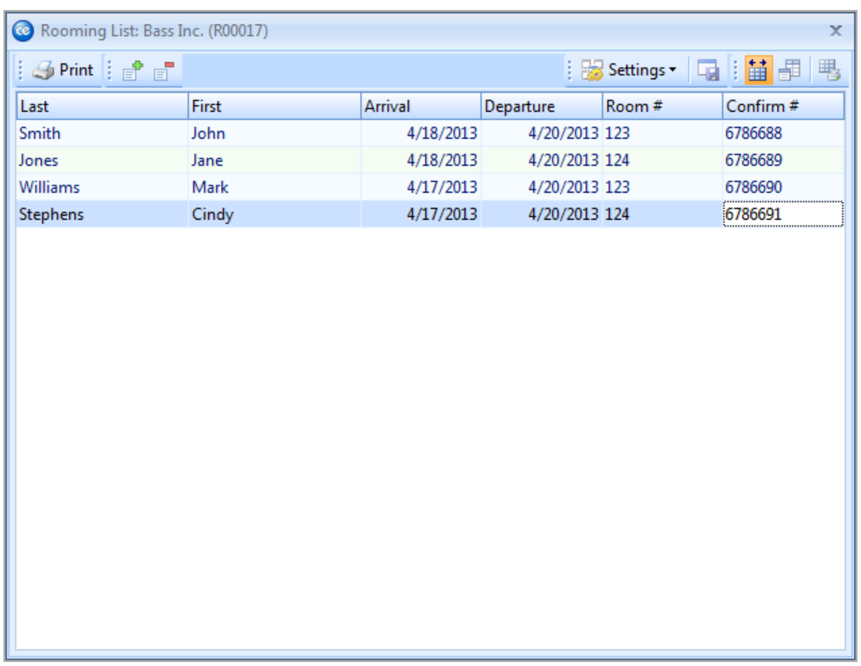
5. Type the first name of the guest into the First field, and press **[Tab]** or **[Enter]**.

6. Enter the Arrival and Departure dates by clicking the down arrow to the right of each field to access a drop-down calendar, and then press **[Tab]** or **[Enter]**.

7. Enter the room number into the Room # field, and press **[Tab]** or **[Enter]**.

8. Enter the confirmation number into the Confirm # field.

9. When finished, click the X, located at the upper right-hand corner of the window, to close the window.
   Note: *You will be prompted to save your changes.*



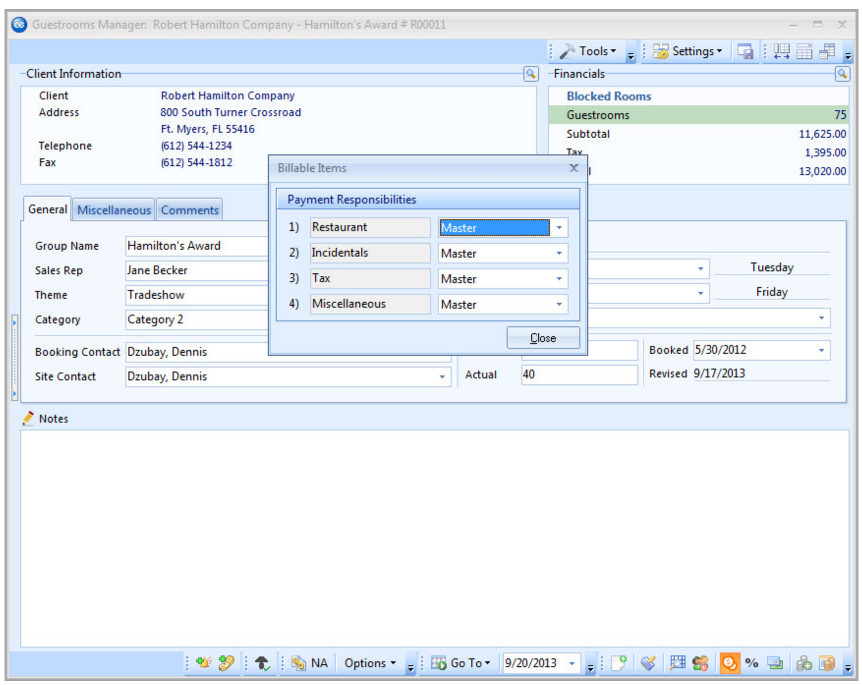
Entering Billing Responsibility in Guestrooms Manager

You can set up various categories of bills: "Restaurant," "Incidentals," etc., and determine whether each individual is responsible for payment or if payment will be covered by the master account. The categories of billing can be determined in the Setup menu of Caterease, and the billing information can optionally print on the Rooms Contract.

Entering Billing Responsibility in Guestrooms Manager

1. From an account in Guestrooms Manager, click the **Billing Responsibility** button , located in the toolbar at the bottom of the screen.
   Result: *The Billable Items window opens.*

2. Click next to **Individual** or **Master**, located in the drop-down list, to assign billing responsibility for each category.
   Note: *These billing categories default to the categories you established in your programs setup menu. If you have not yet established defaults, or if your defaults were established after this particular contract was booked, you can enter billing categories in this window by simply typing into the fields provided.*



3. When finished, click **Close**.

Editing Group Booking Tax Rates

New guestrooms bookings will automatically assume the default tax rates you have established in your program's setup. This rate can be easily edited on-the-fly.

Editing Group Booking Tax Rates

1. From an account in Guestrooms Manager, click the **Tax Rates** button %, located at the lower right-hand side of the Guestrooms Manager screen.
   Result: *The Tax Rates window opens.*

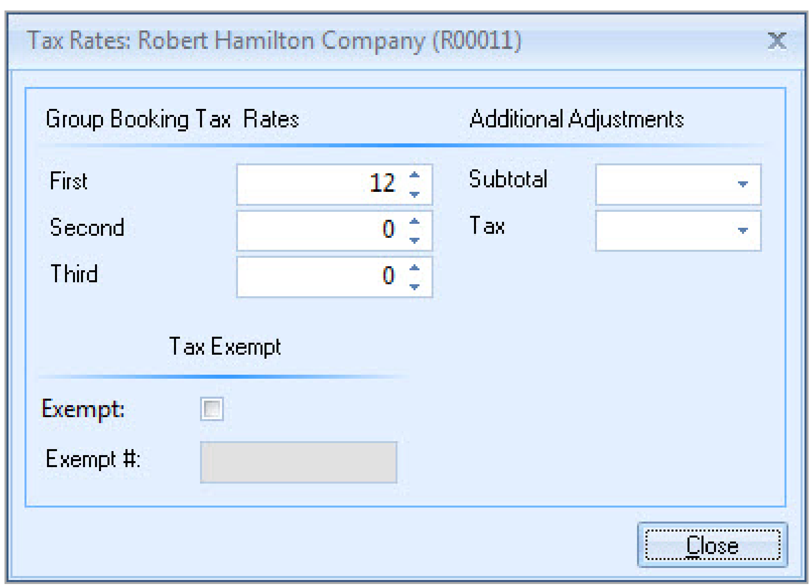
2. Click into any Group Booking Tax Rates field and exit as desired, typing rates or using the up-and-down arrows to increase or decrease the rate one percentage point, respectively.

3. **[Optional]** Click into the checkbox labeled **Exempt**, at the lower left of the form, if you would like to make the order tax-exempt.

4. **[Optional]** Click into the Exempt # field and enter a tax exempt ID number.

5. **[Optional]** Enter the date the tax exemption expires.

6. If additional adjustments need to be made to the Subtotal or Tax rates, type the adjustments into the appropriate field.
   Note: *You may also access a drop-down calculator by clicking the down arrow to the right of each field.*



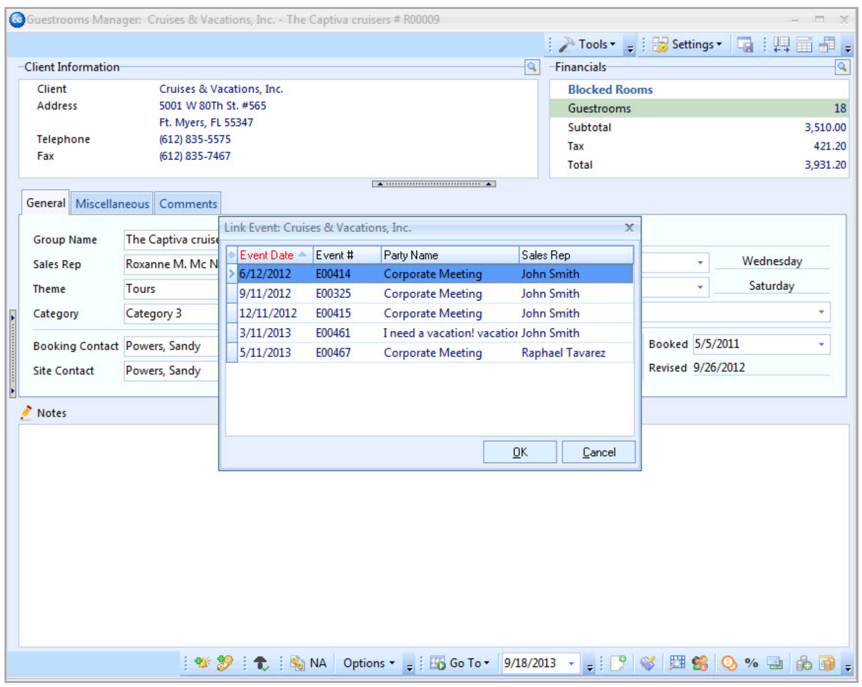
7. When finished, click **Close**.

Using Linked Events in Guestrooms Manager

If you have a group of people staying in your guestroom and who are also holding a function at your facility, you might want to link those two contracts together. This way, you can print a Rooms Contract from your Guestrooms Manager which will include the details of that group's event.

Linking a Guestrooms Contract to an Existing Event

1. Access Guestrooms Manager.
2. Click the **Options** button, located at the bottom of the screen.
3. Select **Link to an Existing Event**.
   Result: *The Link Event window opens.*



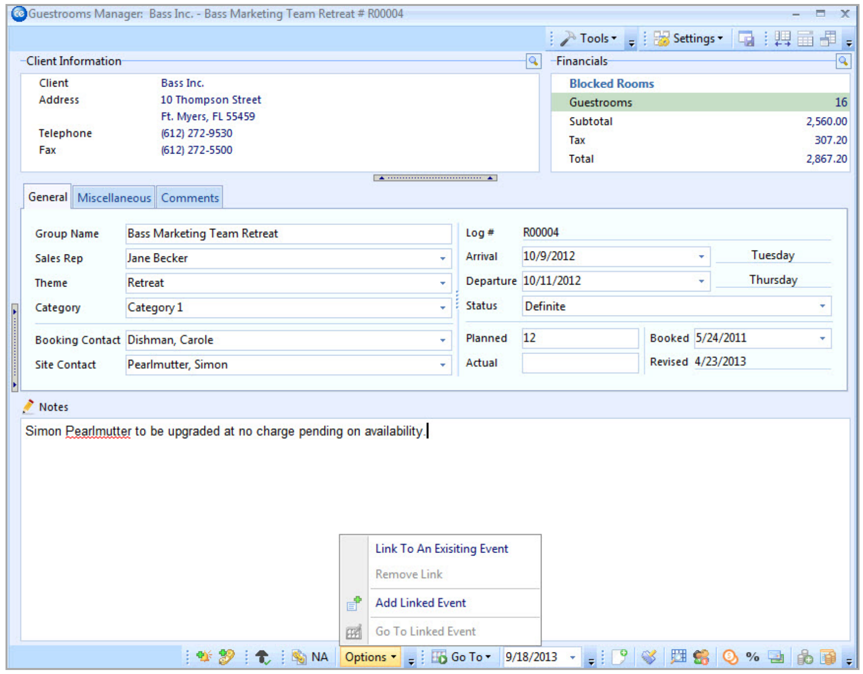
4. Select an event from the list of events associated with this client.
5. Click **OK**.
   Result: *The Link Event window closes, and the link has been established.*
   Note: *To remove a link, click the **Options** button and select **Remove Link**, then click **Yes** at the confirmation message.*

Creating a New, Linked Event in Guestrooms Manager

1. Access Guestrooms Manager.

2. Click the **Options** button, located at the bottom of the screen.

3. Choose **Add Linked Event**.
   Result: *A confirmation prompt appears.*



4. Click **Yes** to confirm your choice.
   Result: *Event Manager opens, placing you on a new event for the current client.*

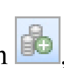
Adding Payments to a Guestrooms Contract

Once a guestrooms contract has been booked in Caterease, all of its financial information can be tracked. This includes the amount paid, upcoming deposits due, and outstanding balance.

Adding Payments to a Guestrooms Contract

1. Open Guestrooms Manager.

2. Retrieve an account or add a new account.

3. Click the **View/Edit Payments On Group Booking** button , located at the bottom of the screen.
   Result: *The Group Booking Payments window opens.*

4. Click the **Add Payment** button , located at the top left-hand side of the Group Booking Payments form.
   Result: *The Payment Details window opens.*

5. Enter, into the Date field, the date the payment was received by typing directly into the field or clicking the down arrow to the right of the field to access a drop-down calendar.
   Note: *This field auto-populates with today's date.*

6. Press **[Enter]** to move to the next field.

7. Enter the payment amount into the Amount field.

8. Enter the Pay Method by typing directly into the field or by selecting an option from the drop-down quickpick list to the right of the field.

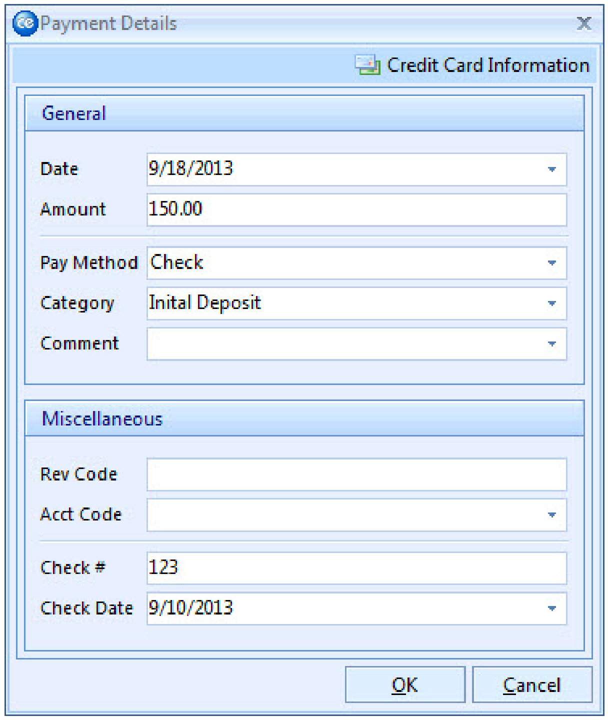
9. **[Optional]** Click the **Credit Card Information** button, located at the top right-hand side of the window, if you would like to enter the customer's credit card date.

10. **[Optional]** Enter a Category or select an option from the drop-down quick-pick list.

11. **[Optional]** Enter additional information into the Comment field or select an option from the drop-down quickpick list to the right of the field.

12. Continue filling out the **Miscellaneous** remaining fields as desired, either by typing directly into the fields or by choosing an option from the corresponding

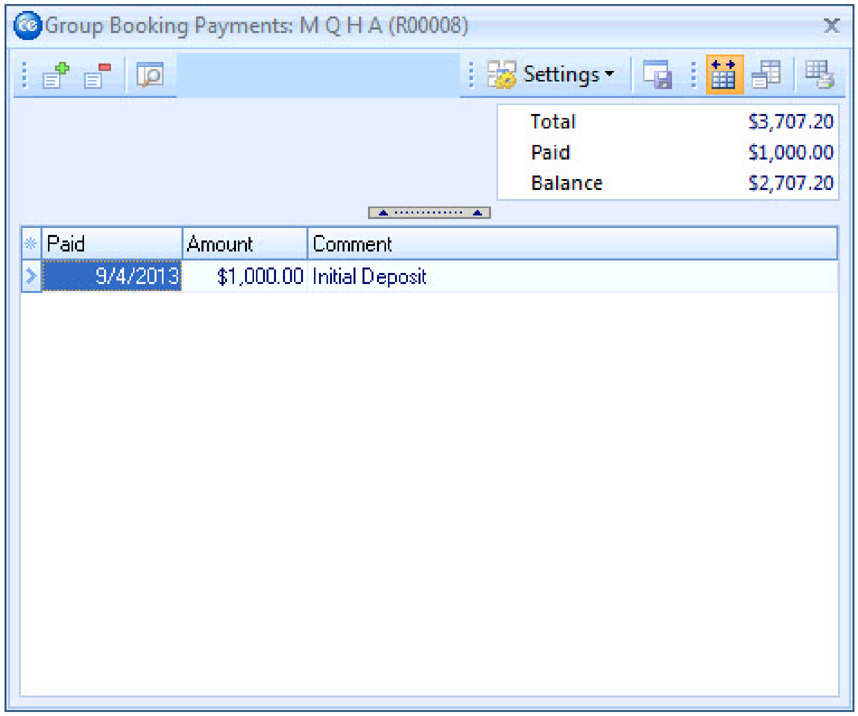
drop-down lists.



13. When finished, click **OK**.

Viewing or Editing Payment Details

1. From the Group Booking Payments window, click on any payment on the list.



2. From an account in Guestrooms Manager, click the **View/Edit Payments on Group Booking** button , located at the bottom of the screen.
   Result: *The Group Booking Payments window opens.*

3. Click the **View/Edit Payment Details** button , located at the upper left-hand side of the Group Booking Payments window.
   Result: *The Payment Details window opens, showing the details of the selected payment.*

4. Edit the information as desired. (See topic above.)

5. Click **OK** to close the Payment Details form.

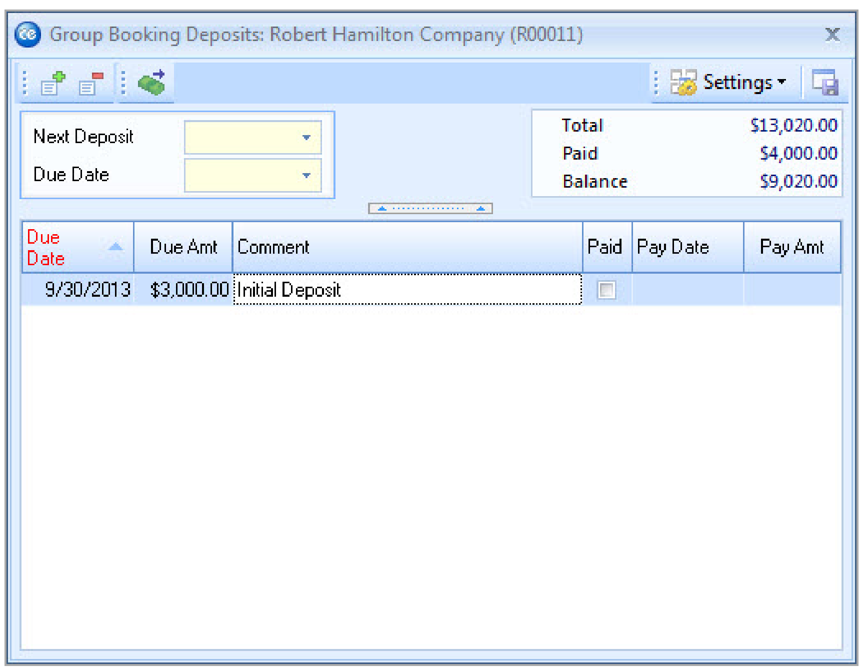
6. Click the X at the upper right-hand corner of the Group Booking Payments window to close the window.

Scheduling Deposits Due for a Guestrooms Contract

The Group Deposits Due feature in your Guestrooms Manager lists money that is due for a rooms contract. Once a scheduled deposit has been paid, you are able to add it to the payments for that contract without having to leave the Group Booking Deposits window.

Scheduling Deposits Due

1. Access Guestrooms Manager.
2. Retrieve an account or add a new account.
3. Click the **Group Deposits Due** button , located at the bottom right-hand side of the screen.
   Result: *The Group Booking Deposits window opens.*
4. Click the **Add Deposit** button , located at the top left-hand side of the window.
   Result: *A blank line is added to the deposits list.*
5. Click the down arrow at the right of the Due Date field, and select a deposit due date from the drop-down calendar.
6. Press **[Enter]** to move to the next field.
7. Enter a deposit amount into the Due Amt field or click the down arrow to the right of the field to access the calculator tool.
8. Press **[Enter]**.
9. **[Optional]** Enter a comment into the Comment field.
   Note: *Examples of Comments might include "Initial Deposit," "Final Payment," etc.*



10. When finished scheduling deposits, click the X at the top right-hand corner of the window to close the window.

Adding Payments to Scheduled Deposits

1. Access Guestrooms Manager.

2. Retrieve an account or add a new account.

3. Click the **Group Deposits Due** button, located at the bottom right-hand side of the screen.
   Result: *The Group Booking Deposits window opens.*

4. Click the checkbox in the Paid column.
   Result: *The current date is automatically entered in the Pay Date column and the due amount is entered as the Pay Amt.*

5. Click the **Add to Payments** button if you wish to automatically add a payment to this booking, reflecting this deposit.
   Result: *A confirmation prompt appears.*

6. Click **Yes** to confirm your choice.
   Result: *The Payment Details window opens.*
   Note: *The payment date and amount will default from your Group Booking Deposits window, which the payment method will default from the general booking information (if you have entered a payment method and/or credit card information).*

7. Enter or edit information as desired.

8. Click **OK**.
   Result: *A new payment has been added to this booking based on the paid deposit.*
   Note: *If you wish to review payments made for this contract, click the* ***View/Edit Payments on Group Booking*** *button, also at the lower right-hand side of the display.*

Unit 3: Printing and Emailing a Guestrooms Contract

Objectives:

Upon completing this unit, you will be able to:

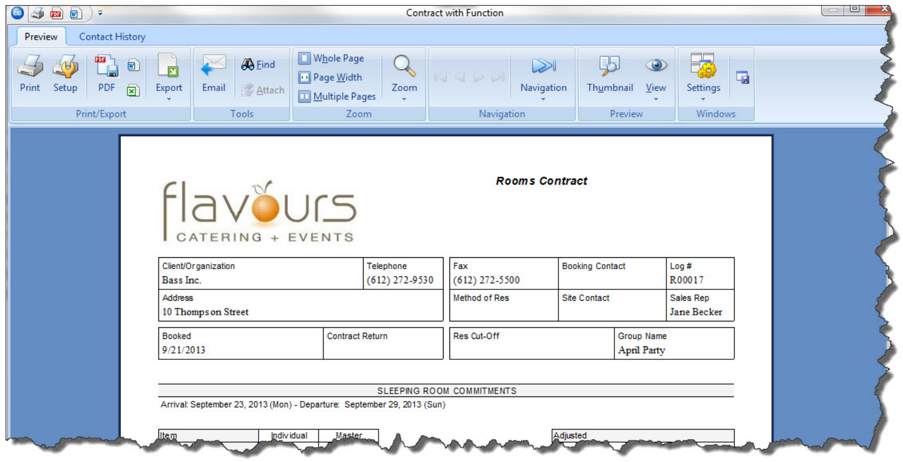
- *Generate a Guestrooms contract.*
- *Print and e-mail a Guestrooms contract.*
- *Use a merge document as the body of an e-mail.*
- *Modify the format of the Guestrooms contract.*

Printing a Guestrooms Contract

You can instantly generate booking-related prints (such as contracts) individually, or generate multiple prints simultaneously with a single mouse click.

1. Retrieve a group rooms booking in Guestrooms Manager.
2. Click the **Prints** button at the top of your screen.
3. Click **Contracts/Invoices**.
   Result: *The Contracts/Invoices drill-down menu opens.*
4. Click **Guest Rooms Contract** or **Contract with Function**.
   Result: *A print preview of your selected print displays.*
5. Optionally click the **Printer Setup** button on the print preview screen to change the selected printer or the number of pages or copies.
   Result: *The Printer Setup window opens, allowing you to change various printer options.*
   Note: *If you use this step, you must click* ***OK*** *before moving on to Step 6, below.*

6. Click the **Print** button on the Print Preview screen.
   Result: *The print is sent to your selected printer.*



Emailing a Guestrooms Contract

You can e-mail your guestrooms contract directly from Caterease. Plus, if you own the Marketing Tools add-in to the program, you can use one of your custom merge letters as the body of an outgoing e-mail.

1. Click the **Email** button at the top of the Print Preview screen.

2. Notice that the print is automatically attached as a PDF at the bottom of the e-mail window.
   Note: *You can change the format of this attachment by clicking it with your right mouse button and selecting* ***Change Type To*** *and choosing a different type.*

3. Type the recipient's e-mail address into the To field, or click the word **To** at the top of the window to access the Caterease address book.
   Note: *The Caterease address book automatically lists all contact people (who have e-mail addresses on file) for the current customer.*

4. Type a subject for the e-mail in the Subject field or click the down arrow at the right of the field to access the customizable quickpick list.

5. Click into the large white text block of the e-mail window and type the body of your e-mail or optionally insert a custom merge letter by clicking the **Merge Doc** button (available if you own the Marketing Tools add-in).

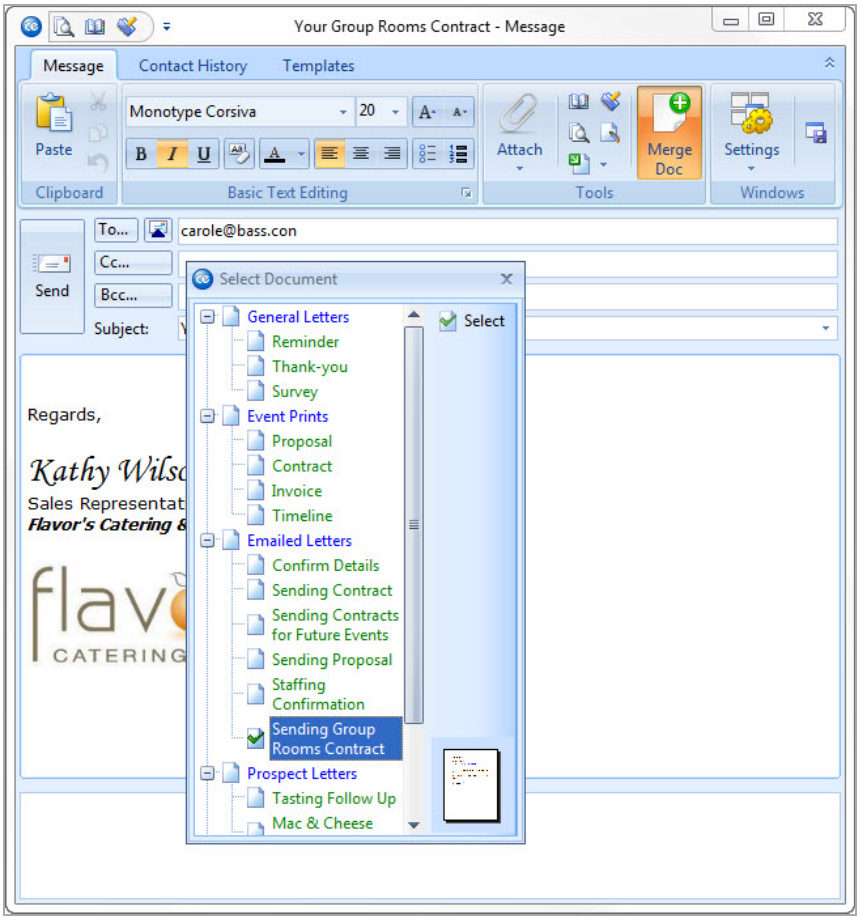
6. When finished, click the **Send** button, located at the top left-hand side of the window, to send the e-mail.

Using a Merge Letter as the Body of an Email

1. Click the **Merge Doc** button , located at the top of the e-mail window.
   Note: *You must own the Marketing Tools add-in to the program to use this feature.*

2. Click on a merge letter to use as the body of the e-mail.

3. Click **Select**.
   Result: *A confirmation prompt appears.*
   Note: *As an alternative, you can double-click the title of the letter to insert it.*



4. Click **Yes**.
   Result: *The letter that you've chosen becomes the body of your current e-mail, and all merge fields merge in appropriate information from this event.*

Modifying a Guestrooms Contract

1. Click the **Setup** sidebar on the left-hand side your screen.
   Note: *Do not close out of Guestrooms Manager; you must have an active window open in Guestrooms Manager.*

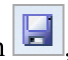
2. Click the **Print Designer** button.
   Result: *The Print Designer window opens.*

3. Click the **Print Type** button, located at the top of the window.

4. Choose **Guestrooms Manager Print**.
   Result: *The list of titles in the left-hand pane of the window updates to show all current prints of this type.*

5. Select the desired Guestrooms Manager print from the left-hand pane.

6. Edit the print as desired.
   Note: *Refer to the Creating Custom Event Prints manual for detailed information about customizing prints*.

7. When finished, click the **Save** button , located on the upper left-hand side of the Print Designer window.

Unit 4: Generating Reports and Queries

There are several reports available to you from Guestrooms Manager. All of them are accessible by clicking the Guestrooms Manager button from the Reports ribbon tab. Although the reports are not quite as flexible as the query tool, they are nonetheless robust tools for obtaining information. This section discusses tracking your Guestrooms Manager data.

Objectives:

Upon completing this unit, you will be able to:

- *Run Guestrooms Manager Reports.*
- *Generate a Guestrooms Query.*
- *Generate a Guestrooms Activity Query.*
- *Customize the query.*
- *View the Guestrooms Summary.*

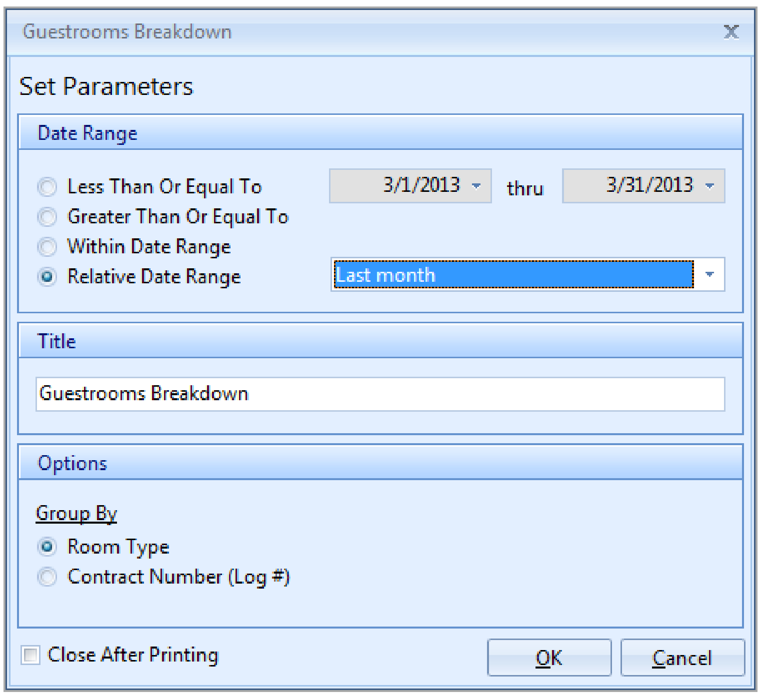
Running a Guestrooms Control Log Report

1. Click the **Reports** drop-down menu at the top of the Caterease screen.
2. Choose the **Guestrooms Manager** subgroup.
3. Select the **Guestrooms Control Log** report.
4. Select the desired **Year** and **Month** from the drop-down lists.
   Note: *The report defaults to the current month and year.*
5. **[Optional]** Enter a custom title for the report by typing over the words "Guestrooms Control Log."
6. **[Optional]** Click the down arrow under Exclude Status and select one or more event statuses to be excluded from the report.
7. **[Optional]** Click the down arrows under Group By and choose to group menu items by a particular detail.
   Note: *You may optionally group by a second field, if desired, by clicking the down arrow to the right of the second field under **Group By**.*
8. **[Optional]** Click the down arrow under Room Type to select a specific room type, e.g., Blocked, Agreed, Adjusted, Pickup).
9. Click **OK** to generate the report.

Running a Guestrooms Breakdown Report

The Guestrooms Breakdown Report allows you to track guestrooms by a particular date range, and group them by group type or contract number.

1. Click the **Reports** drop-down menu at the top of the Caterease screen.
2. Choose the **Guestrooms Manager** subgroup.
3. Select the **Guestrooms Breakdown** report.
4. Select a specific date or date range to track menu items for, or use the relative date range options.
   Note: *Items ordered for events occurring during this date range will be listed on the report.*
5. **[Optional]** Enter a custom title for the report by typing over the words "Guestrooms Breakdown."
6. **[Optional]** Click the down arrow under Group By and choose to group menu items by a particular detail: **Room Type** or **Log #.**
7. Click **OK** to generate the report.



Tracking Group Room Payments Made or Deposits Due

The Guestrooms Manager has two very handy reports which will allow you to quickly check all payments received for a particular date range as well as all deposits that will due.

1. Click the **Reports** drop-down menu at the top of the Caterease screen.

2. Choose the **Guestrooms Manager** subgroup.

3. Select the report you want to generate (**Payments Made** or **Deposits Due**).

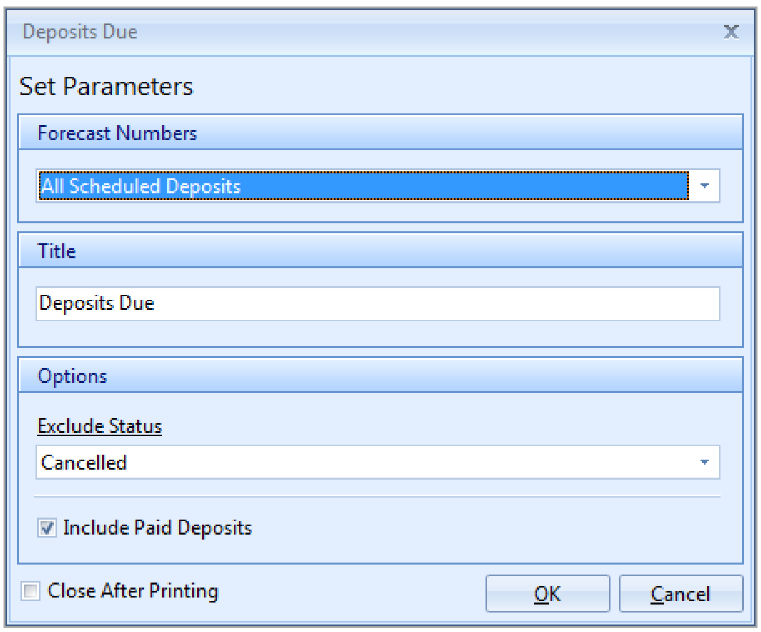
4. Enter a date range for the report.
   Note: *For Deposits Due, click the down arrow under* ***Forecast Numbers*** *and select a range of days out to check deposits.*

5. **[Optional]** Enter a custom title for the report by typing over the words "Payments Made" or "Deposits Due," depending on the report you selected.

6. If running the Deposits Due report, optionally exclude contracts with a particular status by clicking the appropriate checkboxes from the drop-down list.

7. If running the Deposits Due report, optionally include paid deposits by clicking the **Include Paid Deposits** checkbox. If running the Payments Made report, optionally click the **Include Details** checkbox.

8. Click **OK** to generate the report.



Performing a Guestrooms Query

The Guestrooms Query tool allows you to search through your entire database of guest room bookings and find only those bookings you want to see. You can set any number of criteria to search by, and even save queries for future use. Once a query has been performed, you can print various reports based on the results, as well as rooms contracts for any and all records on your results screen.

1. Click the **Guestrooms Query** button in the **Queries** sidebar group.
   Result: *The Guestrooms Query screen opens.*

2. Click the button labeled **Click here to add a new condition**.
   Result: *A query condition is added, stating "Arrival equals <empty>."*

3. Click on the word "Arrival" in the condition and choose any condition from the drop-down list.
   Result: *You are establishing the first criterion for your query.*
   Note: *You can sort this drop-down list of criteria alphabetically using the **Settings** button.*

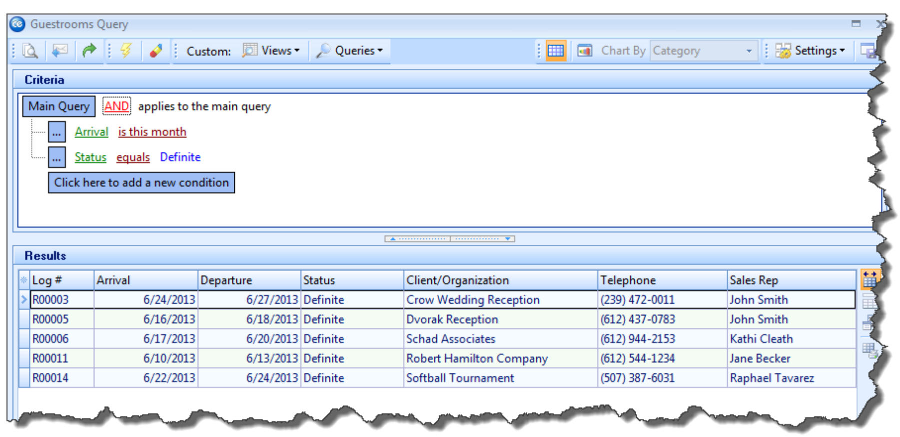
4. Click the word "equals," next to your criterion, and choose any option.
   Result: *Your selection replaces the word "equals" in your condition.*

5. Click the final word in the condition and choose a value for the condition to be compared to.
   Note: *These lists are dynamic. If you are searching by Sales Rep, then this list will be your quickpick list of Sales Reps. If you are searching by date, you will be provided with a drop-down calendar to assist you in picking dates. If you are searching by financial fields, you will be given a drop-down calculator.*

6. Add as many query conditions as desired, repeating Steps 2-5.
   Note: *You can query for records that match one condition OR another, or records that do not match any conditions you set, etc. Simply change the conjunction that applies to the query by clicking the word "And" in the line "AND applies to the main query" at the top of the screen, and select the desired option.*

7. To remove a condition added by mistake, click the button to the left of the condition and select **Remove Condition**.

8. Click the **Perform Query** (lightning bolt) button .



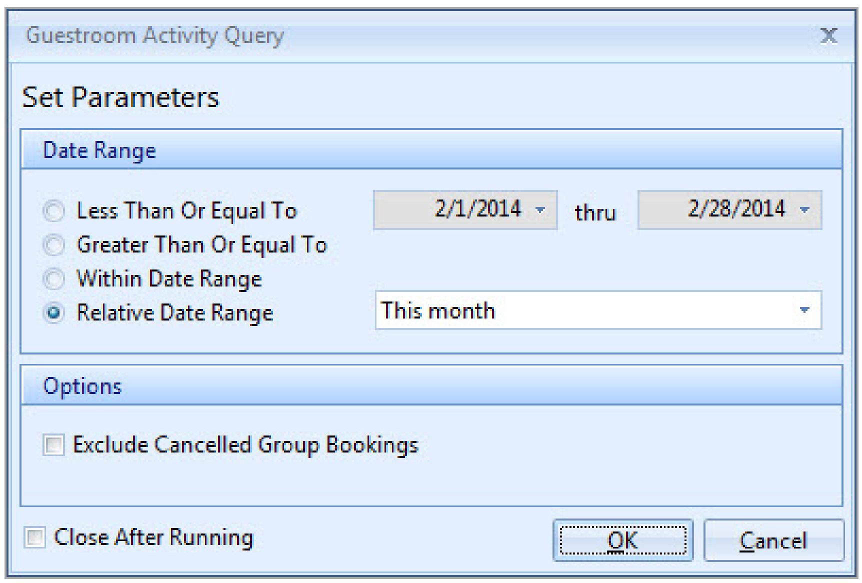
Running a Guestrooms Activity Query

This dynamic tool can show you all guest rooms that have been booked for an entire day or date range. You can then run various "snap filters" (described above) to zero in on the exact details you want to see - for example, how many rooms of a particular type (singles, queens, etc.), have been booked, how many bookings were done by a particular sales representative, etc.

1. Click the **Guestrooms Activity** button in the **Queries** sidebar group.
   Result: *The Guestrooms Activity Query tool opens.*

2. Choose to track guest rooms booked before or on a specific date, after or on a specific date, or within a date range, by clicking on the corresponding radio button.

3. Optionally choose to exclude group bookings that have been cancelled, by clicking the **Exclude Cancelled Group Bookings** checkbox.



4. Click **OK**.
   Result: *A results grid appears, listing all guestroom bookings based on your established date range and options.*

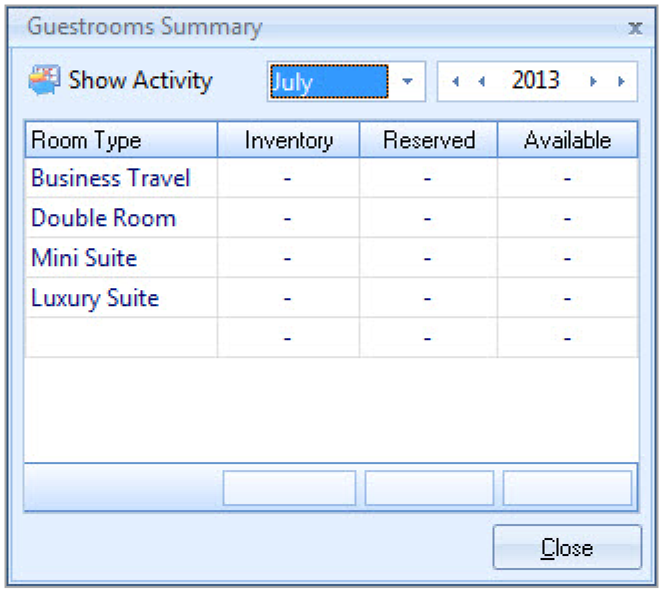
Using the Guestrooms Summary

The Guestrooms Summary tells you the inventory of guestrooms that are available and which are being used for a particular month. Specifically, you will see rooms in inventory, rooms currently reserved, and available rooms remaining. Sleeping room inventory can be set up through the Setup menu as a monthly inventory or a daily one, for each individual room type.

Viewing the Guestrooms Summary

1. Open Guestrooms Manager.

2. Click the **Guest Rooms Summary** button , located at the bottom of the screen.
   Result: *The Guestrooms Summary window opens.*



3. To change months, click the down arrow next to the month name on the top right of the Guestrooms Summary window, then click another month to select.
   Result: *The details on the Guestrooms Summary window instantly update to reflect your new selection.*

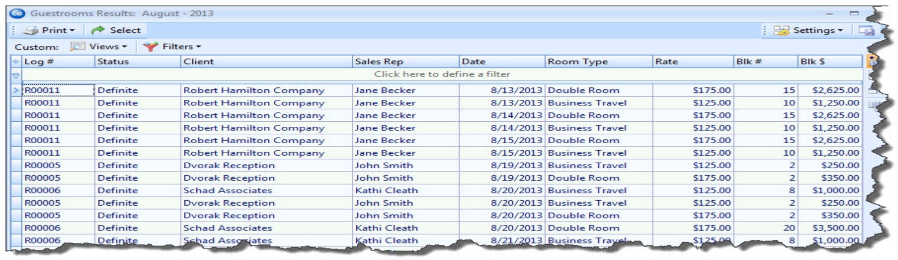
4. Use the left-and-right arrows next to the year to move forward or backward one calendar year, respectively.

5. When finished, click **Close**.

Showing/Printing Room Activity

1. From the Guestrooms Summary window, click the **Show Activity** button, located at the upper left-hand side of the window.
   Result: *The Guestrooms Results detail grid displays.*

2. Sort, group, or filter data displayed in the grid as desired.



3. Click the **Print** button, located at the upper left-hand side of the grid, and choose to print all grid details or details grouped by room type.
Result: *A print preview window appears.*

4. Click the **Print** button on the print preview screen.
Result: *The print is sent to your selected printer.*

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