




Add a Rooming List

1. Access Guestroom Manager.
2. Click the **Rooming List** button , located in the toolbar on the right-hand side of your screen or from your **Tools** menu.
3. Click the **Add Guest** button .
4. Enter details, such as name, arrival and departure dates, room number, and confirmation details, into their respective fields.


(See [Creating a Rooming List](#))

Add Billing Responsibility

1. Access Guestroom Manager.
2. Click the **Billing Responsibility** button , located in the toolbar on the right-hand side of your screen or from your **Tools** menu.
3. Optionally edit your list of Payment Responsibilities by typing over the existing list.
4. Assign billing responsibility to each item in the list by choosing **Master** or **Individual** from the drop-down lists.

(See [Entering Billing Responsibility](#))

Link a Contract to an Existing Event

1. Access Guestroom Manager.
2. Click the **Link to Event** button , located in the toolbar on the right-hand side of your screen or from your **Tools** menu
3. Select an event from the list of events associated with this client.

(See [Using Linked Events in Guestrooms Manager](#) for information about **adding** a linked event.)

Generate the Guestrooms Contract

1. Access Guestroom Manager.
2. Click the bottom portion of the **Prints** button, located at the top of yours screen.
3. Click **Contracts/Invoices > Guest Room Contract or Contract with Function**.
4. Click the **Print** button from the print preview to print the contract. Click the **Email** button to e-mail the contract.

(See [Printing and Emailing a Guestrooms Contract](#))

Additional Resources

[Adding a New Guestrooms Manager Print](#)
[Adding Payments to a Guestrooms Contract](#)
[Scheduling Deposits Due for a Guestrooms Contract](#)
[Using the Guestroom Summary](#)



a product of
Horizon Business Services, Inc.
Naples, FL 34102
T: 239.261.6617
F: 239.261.0067
www.caterease.com
help@caterease.com




Quick Reference Guide:

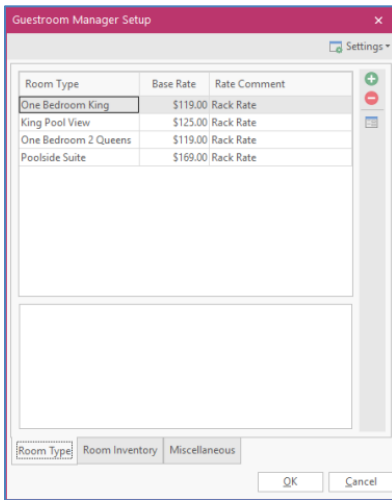
Guestrooms Manager

800.863.1616
www.caterease.com





Add a New Guestrooms Type

1. Click **Administration > Options > Guestrooms Mgr Setup**.
2. Click the **Add Room Type** button  (ensure you are on the **Room Type** tab).
3. Type a name for the room type into the **Room Type** field.
4. Type a base room rate into the **Base Rate** field.
5. Optionally add any comments into the **Rate Comment** field.
6. Repeat steps 2 through 5 to add more room types and rates.
7. When finished, click **OK**.






(See [Adding a New Guestroom Type](#))


Establish Seasonal or Extended Room Rates

1. Click **Administration > Options > Guestrooms Mgr Setup**.
2. From the **Room Type** tab, click on the room type for which you want to establish an extended/seasonal rate.
3. Click the **Show Extended Room Rates** button .
4. Click the **Add Rate** button  from the Room Rate Schedule window.
5. Type a start date for the new rate into the **From** field, and type an end date into the **To** field.
6. Type the extended rate into the **Rate** field.
7. Optionally type a rate comment, such as "Seasonal," "Weekend," etc., into the **Rate Comment** field.

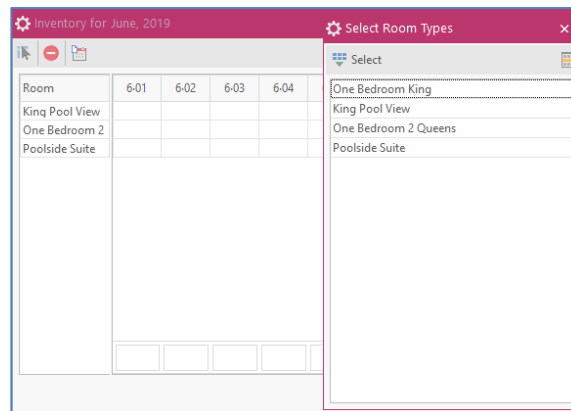
(See [Establishing Extended or Seasonal Room Rates](#))

Establish Daily Inventory

1. Click **Administration > Options > Guestrooms Mgr Setup**.
2. Click the **Room Inventory** tab.
3. Click the down arrow on the **Settings** button .
4. Select **Room Inventory > Daily**.
5. Choose a month and year (top right of the display) to set a daily inventory for.
6. Click the **Daily Inventory Review** button .
7. Click the **Select Room Types** button  from the Inventory window.
8. Double-click a room type or types from the Select Room Types window.
9. Click the **X** at the top of the window to close the Select Room Types window.
10. Click into the first date column and type a number for your inventory for that day.
11. 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.

12. When finished, click **OK**.




(**Note:** You can also establish monthly inventory. See [Establishing Inventory](#).)

Establish Miscellaneous Settings

1. Click **Administration > Options > Guestrooms Mgr Setup**.
2. Click the **Miscellaneous** tab.
3. Click into the first field under **Billable Items**.
4. Type a name for your first billable item category.
5. Type a default tax rate into the **Guestrooms Tax Rate** area. (Add Tax 2 and Tax 3, if necessary.)
6. Click the down arrow to the right of the **Financial Base** field and select an option (Agreed, Adjusted, Blocked, and Pickup).
7. Click into the checkboxes under **Exclude From Inventory** to have Caterase ignore any bookings with a status of Prospective or Tentative.
8. When finished, click **OK**.



Add a New Guestroom Contract

1. Click the **Select** ribbon tab.
2. Click the **More** button and choose **Guestroom Manager**.
3. Click the **Add Record** button , located in the **Home** ribbon tab at the top of your screen.
4. Click **Yes** to confirm.
5. Select the desired account or add a new account.

(See [Accessing Guestrooms Manager](#))

(See [Adding a New Guestroom Contract or Account](#))

Add Sleeping Rooms to the Contract

1. Access Guestroom Manager.
2. Click the **Guestroom Log** button , located in the toolbar on the right-hand side of your screen or from your **Tools** menu.
3. Select a From and Thru **Date Range** by clicking the down arrows to access a calendar or by typing into the fields.
4. Click the **Select Room Types** button  and retrieve guestrooms into your contract.
5. On the Guestrooms Log window, click into the first date column for the first room you have retrieved, then enter a quantity of rooms for that date.
6. When finished, click **OK**.

(See [Adding Sleeping Rooms to the Guestrooms Contract](#))
