Dynamic Packaging QRG
Quick Reference Guide

Date: November 15

Introduction

This Quick Reference Guide will explain the steps required to create and attach a Dynamic Packaging Template to any rate type in Maestro. It assumes that the reader has already created the rates required for use in the Dynamic Packaging Template and is therefore familiar with:
- The Maestro user Interface
- Posting Code creation
- Creating Daily rates, Night Audit Breakdown & Variable Packages
- Building non-room rates (e.g. Other Charges)
- Building Third Party Activities
- Building Spa Services
- Packaging on the Fly

Dynamic packaging templates allow management to attach an existing Spa service, Other Charge rate (i.e. a non-room rate) or third party activity rate to a room rate. The attached dynamic packaging template then posts during the night audit process in a similar way as a variable package.

Note that Package Reconciliation can be applied to the Other Charge used within a dynamic packaging template by configuring this option on the Other Charge rate Type. For further information please refer to the Dynamic Packaging Template QRG.

This guide will describe the 6 steps required to successfully implement Dynamic Packaging Templates:
- Set-up and Configuration
- Creating a Dynamic Package template
- Attaching a Dynamic Package template to a rate
- Booking a Dynamic Packaging template
- Reporting on un-booked items

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Set-up and Configuration

In order to configure Dynamic Packaging Templates the system option to allow Dynamic Packaging must be activated.

System Options

In order to activate Dynamic Packaging and Dynamic Packaging template a charge posting code needs to be created in Global Maintenance. This posting code will only be used by Maestro therefore Northwind recommend this start with a "Z" in order that it remains at the bottom of the posting code look-up list. The Description should be set to "Dynamic Package"
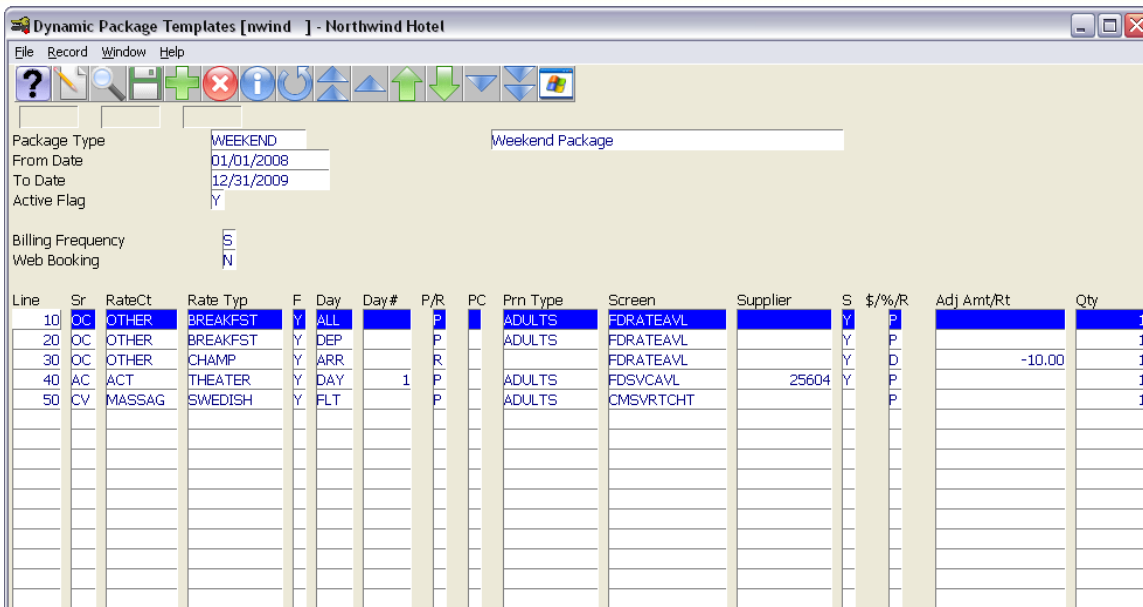
Once created log into Front Desk Maintenance select Setup | Front Desk Global

In the Dynamic package code field look-up and select the posting code just created from the list. This posting code will be used to post the full package charge onto the Guest folio.

Creating a Dynamic Packaging Template

Dynamic Packaging Templates are created in Front Desk Maintenance in Rates | Dynamic Packaging Template

In the Dynamic Packaging Template screen Other Charges, third party activities and Spa Services can be used. Alternatively a combination of all 3 rate types can be used on the same template. There is no limit to the number of other charges, Third party activities or Spa Service that can be used in the same template.

To create a new template press "F6" or the create icon on the toolbar. In the package rate field key in a name for this template – a maximum of 8 characters; Alphanumeric entries are accepted. A description of the package can be entered into the adjacent field – a maximum of 28 characters; Alphanumeric entries accepted.
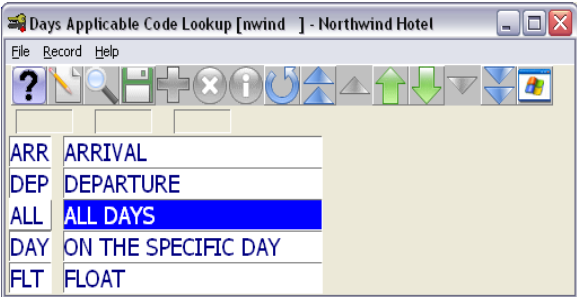
The "from" and "to" dates specify the date range the template is valid. If a template is attached to a room rate and the template ends prior to the rate, then, the rate displayed on the quick availability chart will exclude the Dynamic Package Template.

The Active Flag activates the template. If set to an "N" and the template is attached to a room rate then the rate displayed on the Quick Availability chart will exclude the template. This provides management the ability to "turn off" the template without having to stop selling the rate.

Web Booking will allow this rate & attached template to be booked via the ResWave interface.

Adding items to the template is done in the main body of the screen. The following is a list of the fields and their use:

Option	Description/Action
Line	Press "f6" to create a line number
SR	Identifies whether an Other Charge, Third Party Activity or Spa Service is being attached. A look-up can be performed to select the appropriate source
RateCt	Perform a look-up to select the appropriate Rate Category – note that room is not a valid rate category
Rate Type	A look-up can be performed to select the correct rate type to use.

	If the rate cannot be located check the correct rate category (RateCt) has been selected. The same rate type can be re-used in the template providing the way it is used differs. In the above example the Breakfast component occurs twice as breakfast is consumed on all stay over days and on the day of departure. Where rates have multiple seasons and the Dynamic Package template covers multiple rate seasons each rate season should be added
F	If the item should be forced enter a "y" or "N" if the item is not forced. Forced items in a package require that when a reservation is made these items must be included and cannot be changed. Non-forced items do not have to be booked when a reservation is made
Day 	Day controls the occurrence of the item in the template. Arr – The item occurs on the day of arrival only Dep – The item occurs on the day of departure only All – The item occurs on every stay-over day. It does not occur on the day of arrival or departure Day – The item occurs on the specific day. This option is used in-conjunction with the Day # field (see below). Note that if Day is selected and the Day # left blank this item would occur on the ARRIVAL day Float – The item occurs at any point during the guest stay. No specific day is required for the item to occur
Day #	Where the "Day" option has been selected in the day field this field must be populated with relative day of stay for the item to occur.

	The arrival day is counted as day zero. In the above example the Theater item occurs on a relative day of stay of one which is the second day of the guest's stay
P/R	Is the item to be assigned based on the number of guests - per person or is it per room. In the above example 1 order of champagne will be delivered to the room only on the day of arrival
P/C or Prn Type	If the item being added to the template is based on the number of people on the reservation then either Maestro Person Categories or property defined person categories can be used. The hard-coded Maestro person categories can be used to identify the number of people by using the P/C field. The person categories as defined by your property can be used by using the Prn Type field. Note that only one person category type should be used per item. A combination of the person category types can be used on the same template.
Screen	This will auto-populate and currently cannot be changed
Supplier	If a Third Party Activity is being used a look-up can be performed in order to select the appropriate supplier. This field cannot be modified if a third party activity is not used. Where Multiple suppliers (see "S" below) are required this will become the default supplier to appear on the booking screen.
S	If multiple suppliers exist for the same third party activity drill down to the package template item supplier code screen. A look-up can be performed to find the appropriate supplier. Each supplier to be included must be listed here.
$/%/R	A look-up can be performed in order to select from the options in relation to the amount the guest will be

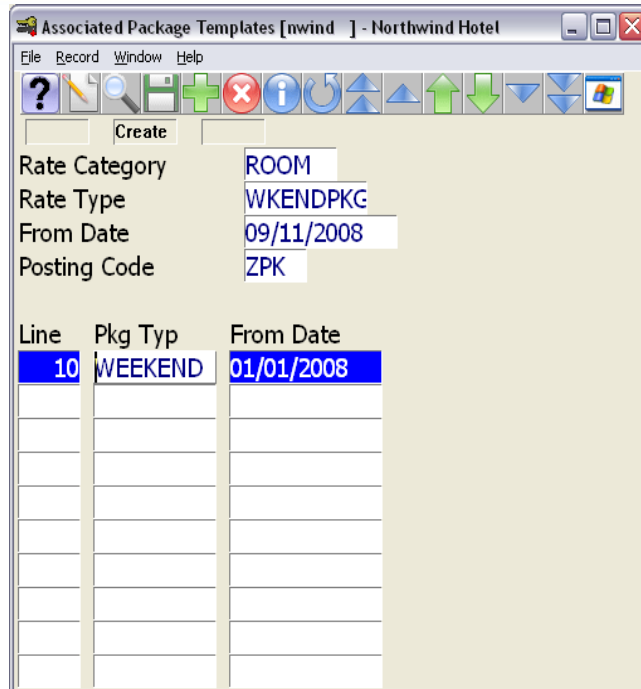|	
Percent/Amount/Rate Flag [nwind] - Northwind Hotel File Record Help P PERCENTAGE ADDITION/REDUCTION D $ VALUE ADDITION/REDUCTION R REPLACEMENT RATE	charged for this item. The base cost of the item is located in the daily rate schedule for the Other charge, Third Party Activity or Spa Service. This a mandatory field. The option selected here determines what Maestro will do with the value (or the blank) in the Adj Amt/Rt field. P – Percentage Addition/Reduction. Increase or decrease the rate that is loaded in the Rate type or Spa Service by a certain percentage D - $ Value Addition/ Reduction. Increase or decrease the amount the guest will be charged for the item. R – Replacement rate. Replaces the rate that is loaded in the daily rate schedule If the rate loaded in the daily rate schedule is to be used then option 'P' should be selected and the adj amnt/rt field left blank.
Adj Amt/Rt	The value entered here changes all the values in the daily rate schedule based on the selection made in the $/%/R field. A positive number will increase the rate, while a negative number will decrease the rate if P or D is selected in the $/%/R field. If R in the $/%/R field is used and the adj Amt/RT field is left blank Maestro assumes the rate value should be zero (i.e. the guest is not charged). If an Other Charge is used which includes Package Reconciliation the amount keyed in the adj amt/Rt field will not change the amount to be reconciled.
Qty	Enter the quantity of the item to be charged. This field works in conjunction with the P/R field. The quantity assigned is either per person on the reservation or per room.

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	Note if this field is left blank then the item will not be included on the Dynamic Package template

Attaching Dynamic Package Templates

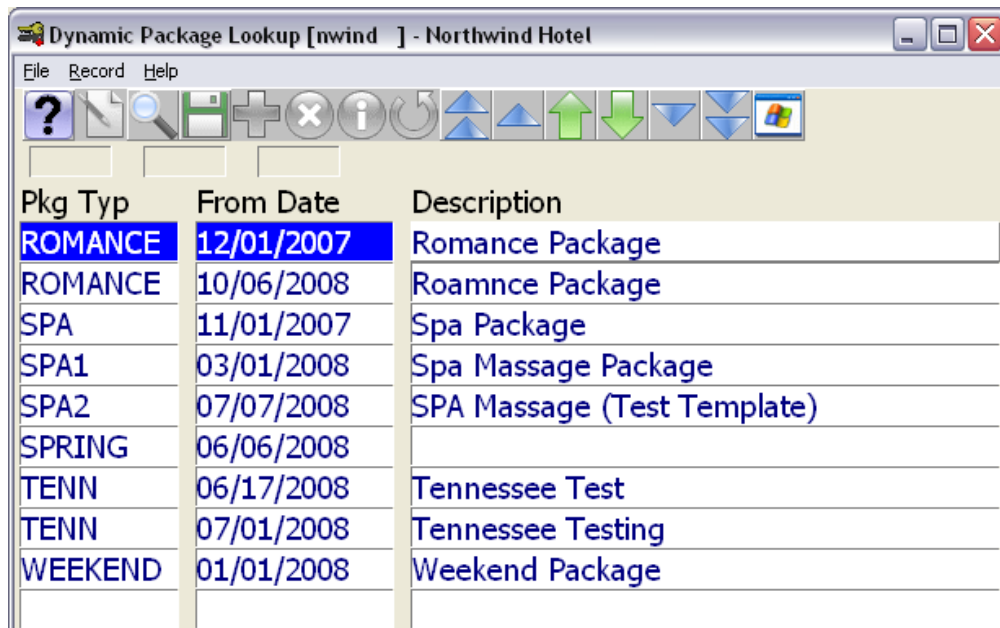Once a Dynamic Packaging Template has been created it can be attached to one or multiple rates.

In the Rate Type that the Dynamic Packaging Template should be associated with drill down on the Assocd Pkg Templates field located in the Rates section of this screen.

In the Associated Package Templates screen generate a line number via the create icon or by pressing F6 in the line field.

A look-up can be performed in the Pkg Typ field and Maestro will display a list of all the Dynamic Package Template that could be associated with this rate.

Once the correct template has been located press enter or double left-click on the package type to select. Only one template can be attached per line, however, multiple templates can be attached to each rate. To attach another template move to the next line on the Associated Package Templates screen and perform a look-up and select the next template.

If there are multiple rate season the template should be attached to the relevant rate seasons.

Booking a Dynamic Packaging Rate

Guest Reservation

To create a guest reservation using a Dynamic Packaging Template, start the reservation creation process as normal. At the Quick Availability Chart a rate that has a Dynamic Packaging Template attached is identified by a 'P' field indicator placed beside the first day rate value.

The rate value displayed includes all forced items in the Dynamic Package as well as the room rate value (including any yielded amounts) for the first day.

Dynamic Package Detail [stuart] - Northwind Hotel

Reservation#   75512
Building   QL
Room Type Code   TTM
Room Rate   WKND

Line	Sr	Rate Cat	Rate Typ	Date	Description	Qty	Amount	F
1	AC	ACT	THEATER	02/02/2009	7pm performance	2	110.00	Y
1	CV	MASSAG	SWEDISH	02/01/2009	Swedish Massage	2	150.00	Y
1	OC	FOOD	PRETHDIN	02/02/2009	Pre-Theater Dinner	2	140.00	N
2	OC	OTHER	BREAKFST	02/02/2009	Breakfast	2	40.00	Y
3	OC	OTHER	BREAKFST	02/03/2009	Breakfast	2	40.00	Y
4	OC	OTHER	BREAKFST	02/04/2009	Breakfast	2	40.00	Y

Drilling down on the 'P' will bring up the Dynamic Package Detail screen. This allows the exact details of what is included in the package to be viewed and what can be added to the package. None of the items in this screen can be modified. Once the screen has been reviewed pressing exit will take the user back to the Quick Availability Chart.

To select the rate place the cursor on the point of intersection (i.e. the rate amount) of the column of the rate type and line of the room type. Press enter or double left-click to select. At the Room Type Booking Screen press enter to continue and Maestro will generate the Book Rate Package Component screen.

Book Rate Package Componants [stuart] - Northwind Hotel

Reservation #   75512
Guest Name   McKechnie, Stuart

VIEW ASSIGNMNT CHART

Booked Value: 1290.00

Line	Description	Up?	F?	Q Reqd	Bk	Date	Day	Amount
1	7pm performance		Y	2	Y	02/02/2009	DAY	110.00
1	Swedish Massage		Y	2	Y	02/01/2009	FLT	150.00
1	Pre-Theater Dinner		N	2	Y	02/02/2009	DAY	140.00
2	Breakfast		Y	2		02/02/2009	ALL	40.00
3	Breakfast		Y	2		02/03/2009	ALL	40.00
4	Breakfast		Y	2		02/04/2009	DEP	40.00

This screen allows the clerk to book an appointment for any Spa Services, third party activities or floating other charges. Items that need to be booked are indicated by a 'Y' in the 'BK' column. Forced items are indicated in the F? Column.

The rules governing when and the frequency of the items to be booked are displayed in the Day & date fields. Note if an item occurs more than once during the stay each occurrence will be displayed. The quantity of each component is displayed in the 'Q Red' field.

If a Spa Service is required the guest name on this screen needs to be populated by typing in the first few letter of the last name and selecting a profile from the list, or, creating a new profile on the fly.

The Assignment chart can be viewed and all features utilized as if accessed directly from the guest reservation screen. It is useful in a Dynamic Packaging environment as it enables the user to review what has been booked, when they will be charged, the taxes and the total price for the stay.

The booked value represents all the items in the package that have been booked (including room charges) and excludes any taxes. As both force and non-mandatory items are booked/added this value will increase.

To book an item, place the cursor on the appropriate line, drill down and the booking screen as defined in the Dynamic Packaging Template will be displayed.

Third Party Activities

This screen displays all the third party activities that are forced in the dynamic packaging template. If multiple suppliers are linked to a particular activity they will all be displayed.

The rate category, rate type and number of guests to book the activity for appear at the top of the screen. If the template forces the activity on a specific date or day of the week this is indicated on the screen by marking the day of the week in red.

The supplier client code, name and first available time slot are also displayed. Time Rqs allows the user to enter a time for the activity to take place and quantity for the number of guests attending. The Book Service Charge screen is displayed for confirming the details back to the guest or making further modifications to the booking.

The toggle button at the bottom of the screen can be used toggle between what has been booked and the availability by supplier for the activity.

Exiting from this screen will return the user to the Book Package Rate Component Screen to book the next item. The user will notice that the 'BK' field indicator has been removed as the item has been booked.

Booking Spa Services

Drilling down on a Spa Service will take the user to the Guest Service Booking screen which provides a list of the bookings associated with this client.

Pressing enter on a particular booking will carry over the provider name into the new booking. This allows for enhanced customer service where certain guests prefer a specific provider. It should be noted that if the service provider does not offer the Spa Service that is part of the Dynamic Packaging Template no availability will be displayed on the services rates chart screen.

If there are no past or future bookings Maestro will take the user to the Services Rate Chart screen.

The Services Rates Chart screen displays the rate, day and time that can be booked for the service contained in the dynamic packaging template.

The Provider field can be used to view all providers and to specify a provider to perform the service (providing the provider is attached to this service). The Availability per day will update accordingly.

The phone number, source & sub-source of business and credit card fields are property defined mandatory fields. Maestro will prompt the user to complete these fields if they are mandatory at your property.

The rate values displayed in red indicate that the service is not available on that specific date. Rate values displayed in green indicate that the service can be booked on that date and the available start times per room will populate at the bottom of the screen. The arrow buttons can be used to move forward and back through the time slots.

To book a service start by placing the cursor on a green rate value field. If a specific day or date is specific in the dynamic package the day and date column header will display in red. Next, place the cursor on the desired start time for a room and press enter / double left click. The mouse pointer will turn to an egg-timer as Maestro books the slot. The screen will refresh, if services for multiple adults and/or multiple services are being booked as part of the package the next booking will be presented. Continue booking time slots until the rate values per day turn blank.

This screen can be toggled between the service included in the package and all Spa Services to enable additional Spa Services to be added to the reservation. The booking entry and services by day screen can both be accessed as well.

Exiting the services rates chart screen returns the clerk to the Book Package Rate Component screen. The user will notice that the 'BK' field beside the Spa Service no longer has a 'Y' as the component has been booked.

Booking Other Charges

All Other charges that have rules specifying the day the charge is to be levied do not need to be booked.

Other charges which have been set to float will need to be booked These charges are identified on the Book Package Rate Component Screen as they have 'Y' in the 'BK' field.

Drill-down on the line item to access the Other Charges Availability Screen. This screen displays the specific Other Charge(s) set out in the Dynamic Packaging template. To book a charge place the cursor in the field under the date the charge is for and key the quantity of charges to be levied. Pressing enter will update the total rate. Differing quantities can be used across a range of dates.

Alternatively, by placing the cursor in the 'QTY' field key in the quantity per day and press enter to access the Book Charge screen. The Start date, quantity and rate (depending on the user's clerk security privilege) can be changed.

Booking Items Later

It is possible to avoid booking the exact date for Other Charges (where float was used in the Dynamic Packaging Template) as well as the date and time for third party activities and Spa Services by exiting from this screen. Maestro will generate a dialogue box advising that the first available date & time slot during the dates of stay for the reservation will be booked if a third party activity has been forced in the template. If a Spa Service has been forced Maestro will warn the user that not all Spa Items have been booked giving the option to return to the Book Package Rate screen (No) or to continue on and complete the reservation (Yes).

From the Guest Reservation screen 2 additional drilldown fields are available to assist booking un-booked items in a dynamic package as well as accessing Spa services that have been added to this reservation.

1. Managing Reservation with Dynamic Packaging Rates

Once a reservation using a rate with a Dynamic Package Template attached has been created there are several ways it can be modified.

Unbooked Items

Drilling down on the unbooked items field on the guest reservation screen displays the package audit screen. This screen allows the user to toggle between items forced in the package that are unbooked as well as all items in the package for this reservation.

Package Audit [stuart] - Northwind Hotel

File   Record   Window   Help

Reservation#   75512   UNBOOKED ONLY

Date	Pkg Typ	RateCt	Rate Typ	Description	B?
02/02/2009	WEEKEND	ACT	THEATER	7pm performance	Y
02/03/2009	WEEKEND	MASSAG	SWEDISH	Swedish Massage	
02/03/2009	WEEKEND	MASSAG	SWEDISH	Swedish Massage	

Drilling down on un-booked items will enable the user to book a date and time for the select item. Alternatively, drilling down on a booked item will allow the user to change the date and time providing it remains within the frequency and timing rules set-out in the template.

It should be noted that having un-booked items has no impact on the check-in process. Any un-booked items that remain un-booked will be charged on the last night of the guest's stay.

Additional Svcs

Drilling down on this field will allow the user to access any Spa Services that have been assigned to the reservation regardless of whether they are booked outside of a dynamic package or they are forced or not forced components of a dynamic package.

Booking List By Res# [stuart] - Northwind Hotel

File   Record   Window   Help

Reservation#   75512
Guest Name   McKechnie, Stuart

Booking#	Inventory	Date	Time	Inv Type	InvCode	Amount	Sts	P
47763	Service	02/02/2009	08:00am	MASSAG	swedish	75.00	CA	
47764	Service	02/02/2009	12:00pm	MASSAG	swedish	75.00	CA	
47767	Service	02/02/2009	10:30am	MASSAG	swedish	75.00	CA	
47768	Service	02/03/2009	03:30pm	MASSAG	swedish	75.00	CA	
47769	Service	02/03/2009	01:00pm	MASSAG	swedish	75.00	CA	

ServiceType   Massage
Service   Swedish Massage

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Drilling down on a particular booking number allows the clerk to modify (including cancelling) the booking as needed.

Assignment Chart

The Assignment Chart screen displays a star beside the rate type as a visual indicator that this rate has been dynamically packaged. The daily values represent the total package amount to be posted during that night audit.

By placing the cursor on the star beside the rate type and drilling down the Package on the Fly Detail screen can be accessed.

This screen displays all occurrences of each item (including room charge) in the package along with the rate amount.

Modifying Package Item Values

Providing the user has the appropriate authorized functions in terms of clerk security the amounts per package item can be altered. Start by positioning the cursor in the new amount column on the line item to be changed.

Next over key the amount and press enter – Maestro will place the difference between the original amount and the keyed value in the 'Difference to Balance' field. Clicking the adjust total button updates the total package price. Note that adjust total has to pressed for the new item price to be saved and the overall package price to be affected. If an Abort is done before pressing adjust total the new price will not be saved.

Removing Package Items

The Rem from Package button cannot be pressed as the package items are part of a Dynamically Packaged rate and therefore cannot be removed from the package.

The Disassemble Pckge button on the package on the fly detail screen enables the entire package to be unbundled. Each item in the package including room will then have a separate line on the assignment chart.

Package Items can then be deleted from the Assignment Chart if required. It should be noted that deleting Spa services from the assignment chart does not cancel any confirmed spa appointments. Confirmed Spa Appointments relating to this guest reservation should be cancelled by pressing the Book Spa/Services button and drilling down on the Spa Service to access the booking and changing the status to cancelled.

Night Audit Breakdown

Maestro uses the same logic to post a room rate that includes a dynamic packaging template as a Variable Package Rate. The exact details of how a dynamic packaging rate posts can be seen by accessing the guest reservation | Assignment Chart | Assigned Rooms/Rates Detail screen

Assigned Rooms/Rates [stuart] - Northwind Hotel

File   Record   Window   Text   Help

Reservation#   75516

Bld	RmType	Room#	Seq#	Line	Post	Fol	Date	Amount	Rate Type	P
QL	SG	602	1	1	ZDP		01/06/2009	580.00	WKND	Y
QL	SG	602	1	2	AFR	B	01/06/2009	390.00	WKND	Y
QL	SG	602	1	3	ZDP	B	01/06/2009	-580.00	WKND	Y
			1	10	SPA	B	01/06/2009	75.00	SWEDISH	Y
			1	11	SPA	B	01/06/2009	75.00	SWEDISH	Y
			1	1	FDVT	B	01/07/2009	40.00	BREAKFST	Y

On the first night audit Maestro uses the posting code as defined in the Dynamic Package Code system option (see section 2.1) to post the total package price onto the guests' folio along with the applicable taxes.

In a Breakdown folio Maestro reverses this posting code, hence the Dynamic Package Posting code should never report any revenue or be higher/lower than zero. The rate values, quantity and frequency then post as defined in the packaging template and/or rate schedule. Adjustments to posted charges that are part of a dynamic packaging template should be made using the posting code used in the rate or a property defined adjustment code. The Dynamic Package Posting code should not be used to adjust revenue.

Should the need arise where each individual item in a Dynamic Packaging Rate should post directly to the guest's folio the package can be disassembled so that all items appear on the assignment chart and therefore post separately.

Group Reservations

In a group reservation environment Dynamic Packaging Templates can also be used. The process for making an individual group member call in reservation would be the same as discussed in section 3.1

Creating a group member reservation from the group master rooming list using a Dynamic Packaging template is almost identical to any group member reservation using any other type of rate. On leaving the room type booking screen however, Maestro generates the book package rate component screen (see section 3.1 for further details). On exiting from this screen Maestro returns the clerk to the rooming list.

It should be noted that the auto-create group member feature is not recommended for use in a group using a Dynamic Packaging Template Rate. In addition the Batch rate change feature is also not recommended for changing the rate type booked on a reservation to a rate that includes a dynamic packaging template.

Reporting

Exceptions Reports – Un-booked Service Reports

The un-booked service report is located in Audit | Audit Reports | Exceptions Reports

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It displays all the un-booked items that are part of a dynamic packaging rate that were not never booked along with the reservation number, guest name, arrival and departure dates. This report can be incorporated into operational procedures to ensure reservations in-house, for example, have all dynamic package components booked.


```
print.smckechnie.txt - Notepad
File  Edit  Format  View  Help
01/07/2009 04:23pm FD8300      Northwind Hotel                       Page    1

Billed but Never Booked Package Items   01/06/2009


Type    Resv #   Status Category Rate Type Description                     Guest Name                    Arrival    Departure
  I     75515    C/O    ACT      THEATER                                   McKechnie, Stuart             01/07/2009 01/07/2009
  I     75515    C/O    MASSAG   SWEDISH    Swedish Massage                McKechnie, Stuart             01/07/2009 01/07/2009
  I     75515    C/O    MASSAG   SWEDISH    Swedish Massage                McKechnie, Stuart             01/07/2009 01/07/2009
  I     75516    IN     MASSAG   SWEDISH    Swedish Massage                McKechnie, Stuart             01/06/2009 01/07/2009
  I     75516    IN     MASSAG   SWEDISH    Swedish Massage                McKechnie, Stuart             01/06/2009 01/07/2009

end of report
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