Sales & Catering Booking Templates
Quick Reference Guide

Contents

Overview

Booking Templates can be created in the Sales and Catering Main module. They can be selected during the Booking Process (from the GRC or Make / Edit Booking screen) or when converting an Inquiry from the Inquiry screen.

Templates can be setup to include selected fields on the Main Booking Screen, Event Detail Screens, Function Rooms, Function Room Setups, F&B Menus, Inventory and Special Charges.

When making new bookings users are prompted with an option to select a Template or to proceed with a booking without a Template. When users choose to select a Template, options to include or exclude (Y/N) items from the template in the new booking are available. For example, a user may need to copy the F&B Items but not the Function Space.

Once the template options are selected, Maestro will create the new booking and verify that all items including function rooms are available. In the event that an item is not available, Maestro provides an error log for reference.

Users can create as many templates as required with as much or as little detail as required. Most options are optional.
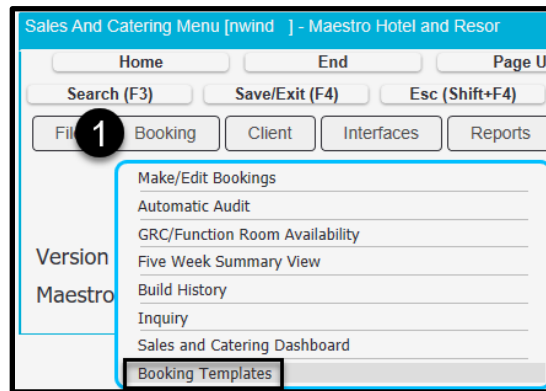
The reader should be familiar with the following Maestro functions:

- Access to Sales and Catering Module
- Creating a Sales and Catering Booking

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I. Access and Create

1) From the Sales & Catering Main Module: Select **Booking** | Select **Booking Templates**

I.I   Booking Templates Screen
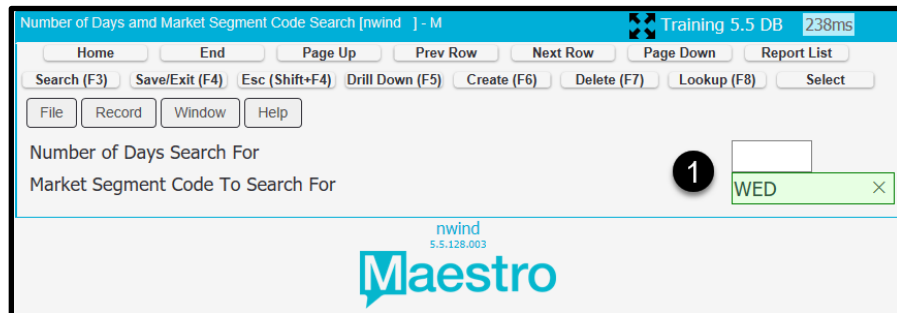
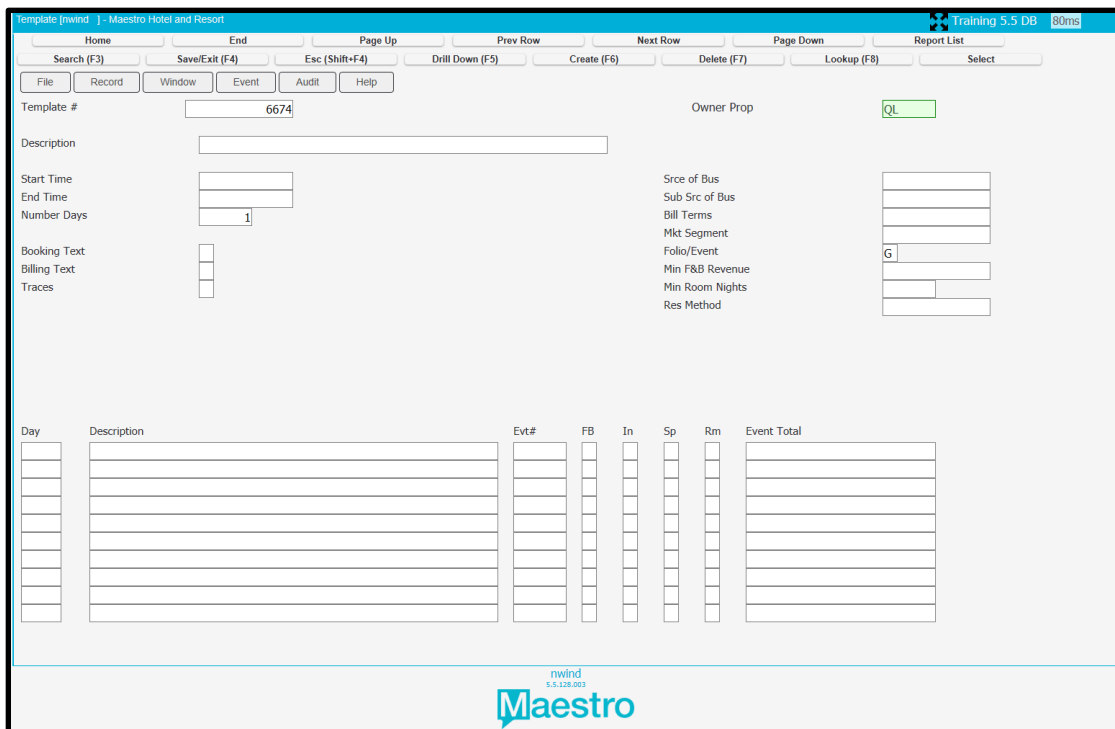| Description	Days	Template#	MrktSgmt
Wedding in the Georgian Ballrm	1	5601	
Corporate Meeting Georgian A	1	5603	COR
7 Day Exec Education - Georgia	7	5606	EXEC
Tour Template	3	5614	TOUR
2 Day Wedding	2	5615	
Christmas Party	2	5625	SOCIAL
Dinner Event	1	5629	SOCIAL
Dinner / Breakfast / Lunch	2	5641	COR
2 Day Wedding - Imperial	2	5644	
Wedding Package 1	1	5661	
Meals Only - Dining Room	3	5675	
Meals + Meeting	3	5678	
Full Day Tuscan Package	1	5694	COR
Complete Meeting Package 2 Day	2	5728	COR
Full Day Tuscan Package - with	1	5740	COR
Meals Only - Dining Room 2 Nig	3	5757	
Corporate Retreat	1	5773	COR
2 Day Wedding - No Rooms	2	5779	
Complete Meeting Package - 3 D	3	5799	COR
Complete Meeting Package 2 Day	2	5800	COR

Search Desc:

Field	Action / Purpose of Field
Description	Displays the description of the booking template
Days	The number of days this booking template will cover
Template #	The template ID #
MrktSgmt	The Market Segment the booking template is for - OPTIONAL
Search Desc:	Input any combination of letters that might exist in a Template Description: I.e., edd will display all templates with the word wedding in the description

1) If there are already many Booking Templates, **Search (F3)** to search the list of created Templates by **Number of Days or Market Segment** to narrow the number of templates on displayed

I.2   Create a New Template

1) From the **Booking Templates** Screen, Select **Create (F6)**

2) A blank **Template** Screen with a prepopulated Template #, Property code, and default Number of Days of 1, will appear

I.3 Social Sample

1) All fields input in the template will transfer over to a booking when this template is selected during the creation of a Sales and Catering booking. *See Making a Booking with a Template section* below

2) These defaults can be edited at the booking level if required

Field	Action / Purpose of Field
Template #	Unique ID # for each template – Maestro auto-generates
Owner Prop	Property this Template is to be used in (only important in a multi-property environment)
Description	This will default as the booking and event descriptions
Start Time	The earliest start time for the daily events to begin
End Time	The latest end time for the daily events to end, latest allowed11:59PM
Number Days	Input the number of days this booking will encompass Sales and Catering Events*
Booking Text	**Drilldown (F5)** – Text that will apply to all bookings utilizing this template
Billing Text	**Drilldown (F5)** – Billing Text that will apply to all bookings utilizing this template
Traces	**Drilldown (F5)** – Add generic traces required for this specific template
Srce of Bus	**Lookup (F8)** – Add to the template if the Source of Business will always be the same for this template
Sub Src of Bus	**Lookup (F8)** – Add to the template if the Sub Source of Business will always be the same for this template
Bill Terms	**Lookup (F8)** – Add to the template if the Billing Terms will be the same for all bookings utilizing this template
Mkt Segment	**Lookup (F8)** – Add to the template if the Market Segment will always be the same for all bookings utilizing this template

Folio/Event	Leave as the default or **Lookup (F8)** and select the Folio/Event setting that will be used for all bookings utilizing this template
Min F&B Revenue	Only input a **$ value** here if all bookings utilizing this template require the same minimum spend for Food and Beverage
Min Room Nights	Only input the **minimum # of room nights** if all bookings utilizing this template require the same minimum for overnight guest rooms
Res Method	**Lookup (F8)** to select the Reservation Method for guest reservations on the Group Master. If this option can vary, leave blank
Event Details	
Day	Displays which **day** this event occurs
Description	**Description** of the Event for the day – Can be modified in the booking if required
Evt#	Displays the **Event #** based on order of creation
FB	Displays a **Y** if Food and Beverage have been added to the template events
In	Displays a **Y** if Inventory Items have been added to the template events
Sp	Displays a **Y** if Special Charges have been added to the template events
Rm	Displays a **Y** if one function room has been added, 2 – 9 if 2 – 9 function rooms have been added and + if more than 9 function rooms have been added to this template
Event Total	Displays **total $ owing** including all taxes and service charges per event
If guests are staying overnight for 1 night but events only occur on the second day, then the Number of Days would be 1 as Sales and Catering Events are only occurring on 1 day	

3) All field names that are underlined are mandatory. All other fields are OPTIONAL

1.4   Corporate Sample

Note: There is no limit to how many templates can be created

I.5 Event Details

Only event details that are generic to this template are added. As much or as little detail can be added to the events including Function Rooms, Food and Beverage, Inventory Items, Special Charges and any generic text information.

1) Place the cursor in a blank Row in the Event Details section of the screen and **Create (F6)**

Day	Description	Evt#	FB	In	Sp	Rm	Event Total
1	Event ⬤1	1					

Event Details [nwind] - Maestro Hotel and Resort   Training 5.5 DB 4ms

Home	End	Page Up	Prev Row	Next Row	Page Down	Report List

| Search (F3) | Save/Exit (F4) | Esc (Shift+F4) | Drill Down (F5) | Create (F6) | Delete (F7) | Lookup (F8) | Select |

| File | Record | Window | Event | SubEvent | Audit | Help |

Template Number 5615 2 Day Wedding
Event Number 2

Description Wedding & Reception   Property Code QL
Event Day 2   Event Text
                            Event Del Text

⬤2

| | FOOD/BEV | INVENTORY | CHARGES |

Start	Sub#	End	Bld	Room	Function	Set Up	FB	In	Sp	ST	DT
10:00am	5	02:00pm	QL	BALMORAL	READY ROOM	SEE NOTES				Y	
02:00pm	1	04:00pm	QL	ATRIUM	CEREMONY	THEATRE		Y	Y		
04:00pm	2	11:00pm	QL	GEORGIANAB	COCKTAILS	CASUAL	Y				
06:00pm	3	08:00pm	QL	GEORGIANAB	DINNER	R8	Y				
08:00pm	4	11:00pm	QL	GEORGIANAB	RECEPTION	RECEPTION	Y				

SubEvent Desc   Responsibility

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2) The **Event Details** screen displays where the Event & Sub event Details can be entered as per a normal Sales and Catering booking

All event details can be left blank and added during the Sales and Catering booking process if the details will be different for each booking

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3) Select **Window** | Select **Book a Function Room**
   a. When using a template with predefined rooms, availability of the specific room and start and end times will be verified at time of booking. If the room is not available, this will appear in the Error Log when the booking is attempted to be made from the template

4) Add all function rooms required

5) Add Sub Events by time, with the correct function rooms with a function and set up

Start	Sub#	End	Bld	Room	Function	Set Up
10:00am	5	02:00pm	QL	BALMORAL	READY ROOM	SEE NOTES
02:00pm	1	04:00pm	QL	ATRIUM	CEREMONY	THEATRE
04:00pm	2	11:00pm	QL	GEORGIANAB	COCKTAILS	CASUAL
06:00pm	3	08:00pm	QL	GEORGIANAB	DINNER	R8
08:00pm	4	11:00pm	QL	GEORGIANAB	RECEPTION	RECEPTION

6) Select **Sub Event** | Select **Food/Bev** Button | Add the Food and Beverage items that are to be served

FOOD/BEV

7) Select **Sub Event** | Select **Inventory** Button | Add the Inventory Items that are to utilized for this template

INVENTORY

8) Select **Sub Event** | Select **Charges** button | Add the Special Charges that will be required for this template

CHARGES

9) **Drilldown (F5)** on the Event and Event Delivery Text and add generic information if required

Event Text	Y
Event Del Text	Y
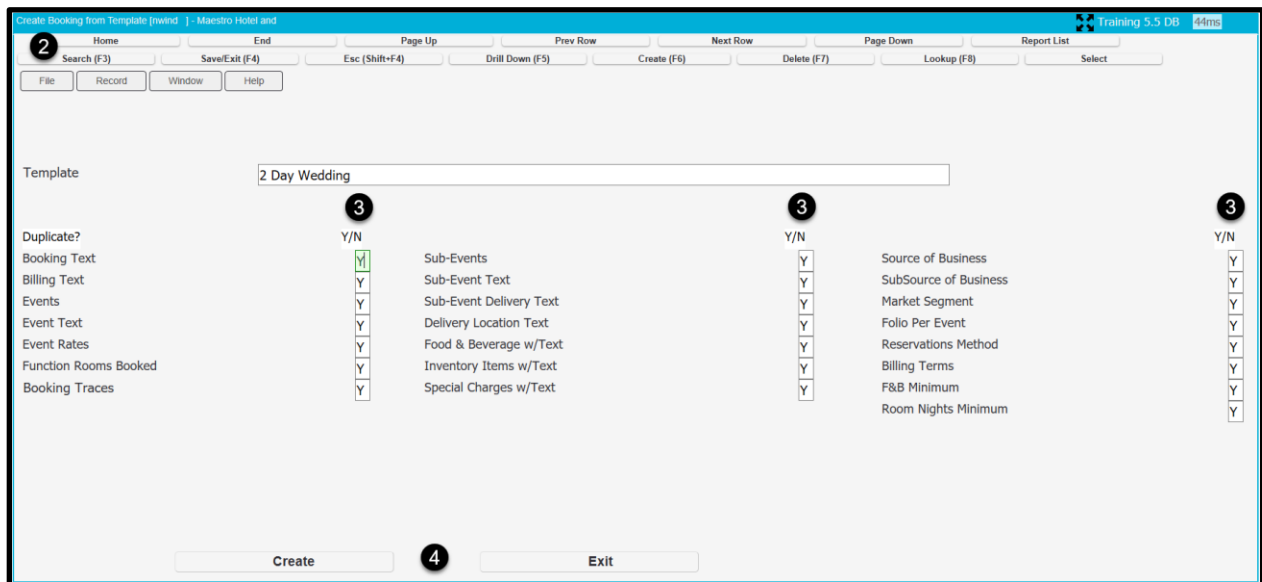
2. Duplicate (or Copy) a Template

Completed Templates can be duplicated and then modified for ease of creation. Access the main Template screen to be copied:

1) Select **Window** Select **Duplicate Template**
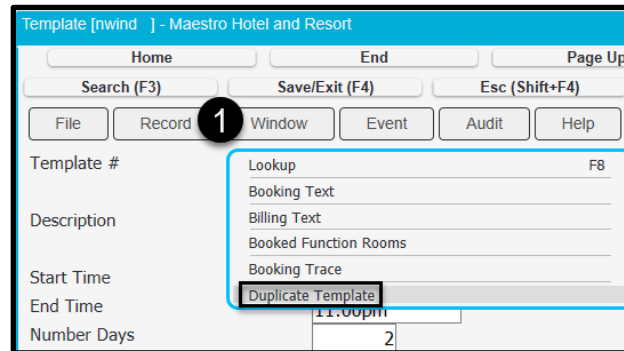
2) The **Create Template from Booking** screen displays

3) Enter "**Y**" yes, or "**N**" no, for the fields to be copied from the current Template to the new Template

4) Select **Create** to complete the duplication or **Exit** to abort the duplication

5) The **Booking Duplicated** pop up appears with the new Template #

3. Edit

To edit an existing template:

1) From the Sales and Catering main screen Select **Booking** | Select **Booking Templates**

2) Select the Template, **drilldown (F5)** into the template OR

3) Select **Edit** | Select **Edit Template**

4) Make any changes as required

5) **Save/Exit (F4)** back to the Sales and Catering main screen

4. Delete

If a Template is no longer required it can be deleted. To delete a Booking Template the Clerk/User must have the **Authorized Function SC TD** added to their Clerk Group or Clerk Code. Authorized functions are added in **Global Maintenance | Security | Clerk Group or Clerk Code Maintenance | Window | Authorized Functions**

1) From the Sales and Catering main screen Select **Booking** | Select **Booking Templates**

2) Select the Template

3) **Delete (F7)** and **OK** to confirm deletion

4) **Save/Exit (F4)** back to the Sales and Catering main screen

Note: If a template is modified or deleted, it has no impact on bookings already created using the template.

5. Create a Booking with a Template

When creating a Booking a Dialog box asking if this booking should be created using a Template pops up. This dialog box will appear when:

1) Converting an **Inquiry** to a Booking

2) There is a **Bookw/Template** button on the **GRC/Function Room Availability** screen

3) When the user chooses **New Booking** from the **Make/Edit Booking** screen
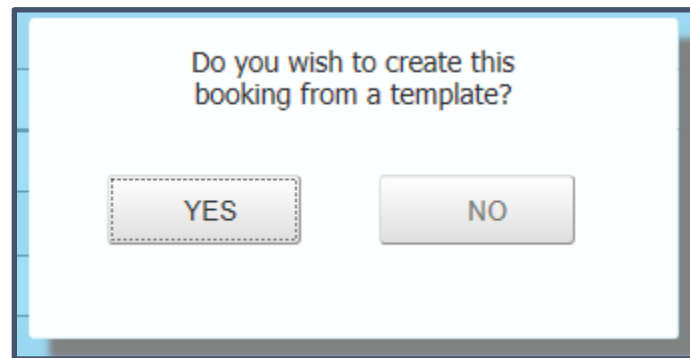
Note: This pop up only appears after a Booking Template has been created. It cannot be turned off

When the **YES** option on the Dialog box is chosen, the user is then presented with the **Template Search** screen.

1) A Template search can be performed based on the **Number of Days** the template is configured for, OR

2) **Lookup (F8)** on the **Market Segment** field to view available Market Segments that could be attached to the Booking Templates

3) If both search options are left blank, all templates configured will be presented when the search button is selected

4) If a number of days or market segment is entered, only those matching the criteria will be returned in the search. In this example, the Market Segment of **COR** was entered and the following Templates with Market Segment COR assigned are available to choose from

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Enter (Select) the required Template. The **Create Booking from Template** screen displays. Fill in the new bookings' details:

1) **From / To Date** – Input the Dates of the Event(s). If a 2-day event has been selected, inputting the From date will autogenerate the To Date to the next day

2) **Client Code – Lookup (F8)** to search for an existing Client or be prompted to create a new profile

3) **Gtd Adults** – Input the maximum # of Guaranteed adults that will be attending

4) Choose "**Y**" yes or "**N**" no for the items to be copied from the template to the new booking. All options default to "**Y**"

Note: If the user selects the **Enter** key to go through the Y/N options, the '**Y**' will automatically change to an '**N**', similar to the duplicate functions within a Sales and Catering Booking

5) Once completed, click **Create** to launch new Booking, or **Exit** to abort

6) When the **Create** option is chosen, the **Booking** screen will appear with the defaults from the Template as selected

6. Booking Creation Error Detail

When creating a booking from a Template and there is a conflict, the **Booking Creation Error Detail** screen will appear advising of the conflict. The booking will be created and the user can resolve the conflict

1) In the below example, the Meeting room on the Template is already booked

2) The Meeting room has been placed on **Waitlist** for the newly created booking

3) **Save/Exit (F4)** to access the Booking screen and resolve the conflicts as required

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4) Possible conflicts are:
   a. Expired items (menu)
   b. Meeting room assigned to template is unavailable
   c. Gtd number of adults exceeds capacity of assigned meeting room

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