



# Maestro Quick Reference Guide

## Sales & Catering Booking Templates Version 5.4.10

Date: 12/13/16

### Introduction

This feature allows users to create and then select from Multiple Templates 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 Room Booking Screens, 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 chose to select a Template, options to include or exclude (Y/N) items from the template in the new booking. For example, a user may wish 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 configure as many templates as required.

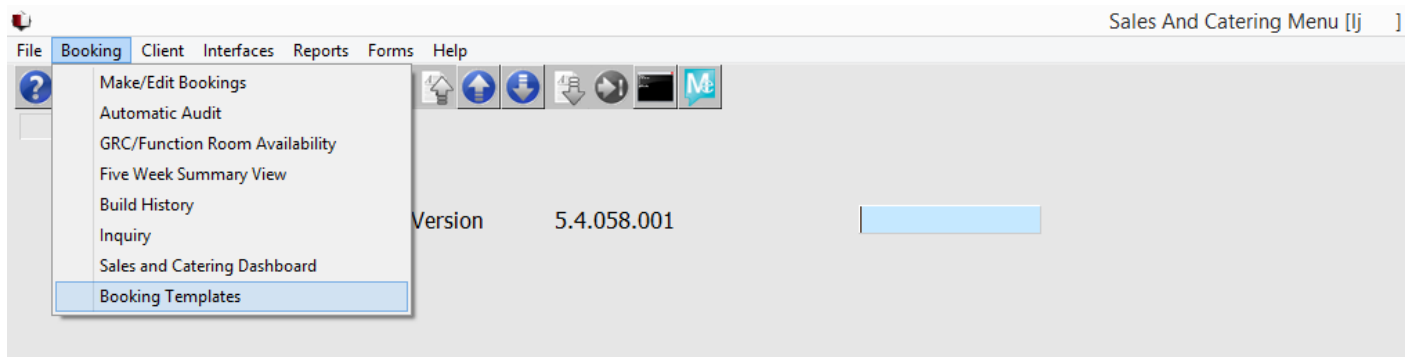
Booking Templates are available from Inquiry conversion, Make/Edit Booking New Booking & GRC Screens.

### Procedure

The following outlines the steps required to create and use a Booking Template. Users should already be familiar with Booking creation.

### Template Creation, Modification or Deletion

From the Sales & Catering Menu > choose Booking > Booking Templates



## Booking Template

Booking Templates [lj ] - Maestro Resort

File Record Edit Window Event Help

Description	Days	Template#	MrktSgmt
Wedding in the Georgian Ballrm	1	5601	WED
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	WED
Christmas Party	2	5625	SOCIAL
Dinner Event	1	5629	SOCIAL
Dinner / Breakfast / Lunch	2	5641	COR
2 Day Wedding - Imperial	2	5644	WED
Wedding Package 1	1	5661	WED
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	WED
Complete Meeting Package - 3 D	3	5799	COR
Complete Meeting Package 2 Day	2	5800	COR

Search Desc:

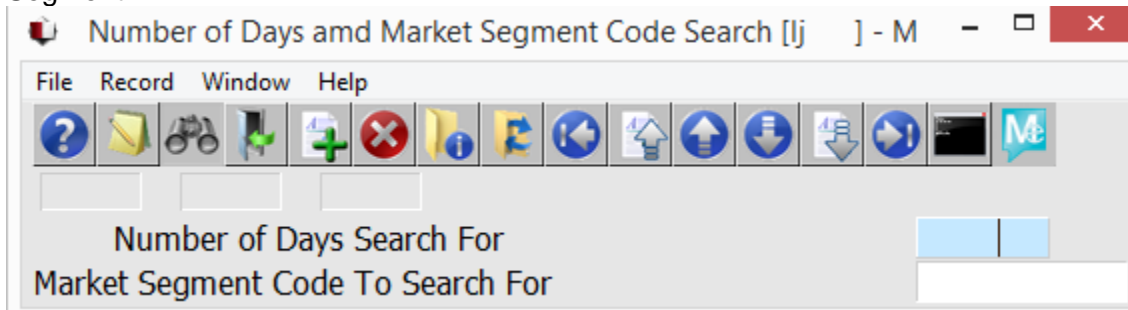
The Booking Template Screen offers the following features;

- Record
  - Select. To select a template, or user can use mouse to click on a template
  - Delete. To delete a highlighted template. Or user can highlight a template and press F7, or click the Delete icon.
  - Create. To Create a new template, or user can press F6 on the template screen.
- Edit
  - Create a new Template
  - Edit details on an existing template. Highlight the desired template to edit, then Edit > Edit template.
- Window
  - Property. Templates can be property specific, choose the desired property to create, edit or view Templates.
  - Booking Text. Allows for editing or entry of booking text on highlighted Template
  - Booked Function Rooms. Displays Function rooms associated to highlighted Template and allows for edit of template.

- Booking Trace. Displays Traces associated to highlighted template and allows for edit.
- Duplicate Template. Allows highlighted Template to be duplicated.
- Event
  - Sub Event. Displays Sub event details associated to highlighted template.
- Search Desc
  - A search feature to search for templates based on Description line entry.

The Booking Template Screen displays the Template Description line, number of days the template covers, the Template # and the Market Segment associated to the Template.

The F3 search key or Icon, allows for search of Templates by number of days or Market Segment.



#### To create a new Template;

- From a blank row on the Booking Template Screen, press F6 to create, or Click the Create Icon on the menu bar
- A blank Template Screen with a prepopulated Template #, Property code, and default Number of Days of 1, will appear.
- Enter the desired;
  - Description – This will default as the Booking Description
  - Start & End Time – This will default as the Booking Start & End Time
  - Number of Days – will default to booking
  - Booking Text – Consistent text that may be required for every booking can be entered
  - Billing Text – Consistent billing text can be entered, and will default to booking
  - Traces – Consistently used Traces can be assigned and will default to booking
  - Source & Sub source of Business codes – These will default to booking
  - Bill Terms – Code entered will default to Booking
  - Market Segment – Code entered will default to Booking
  - Folio/Event – Code entered will default to Booking
  - Min F&B and Room Nights – Code entered will default to Booking
  - Res Method – Code entered will default to Booking

The above codes are all optional entry can will / can vary from Template to Template. For example for a Corporate or Social Market Segment, user may decide not to use a default Source of Business code as it that code can vary booking to booking. For other Market Segments it may apply to have a consistent Source of Business code configured in the Template so users do not have to enter with every booking.



### Social Sample

Template [lj ] - Maestro Resort

File Record Window Event Audit Help

Help (F1)

Template # 5644 Owner Prop QL

Description 2 Day Wedding - Imperial

Start Time 04:00pm  
End Time 11:59pm  
Number Days 2

Booking Text   
Billing Text   
Traces Y

Srce of Bus  
Sub Src of Bus  
Bill Terms  
Mkt Segment WED  
Folio/Event N  
Min F&B Revenue 10000.00  
Min Room Nights 10  
Res Method IND CALL

Day	Description	Evt#	FB	In	Sp	Rm	Event Total
1	Rehearsal	1	Y	Y		Y	206.66
2	Wedding & Reception	2	Y	Y		3	1,049.45

### Corporate Sample

Template [lj ] - Maestro Resort

File Record Window Event Audit Help

Template # 5728 Owner Prop QL

Description Complete Meeting Package 2 Day

Start Time 08:00am  
End Time 06:00pm  
Number Days 2

Booking Text Y  
Billing Text   
Traces

Srce of Bus GROUP  
Sub Src of Bus CORP  
Bill Terms TBD  
Mkt Segment COR  
Folio/Event N  
Min F&B Revenue  
Min Room Nights  
Res Method RM LIST

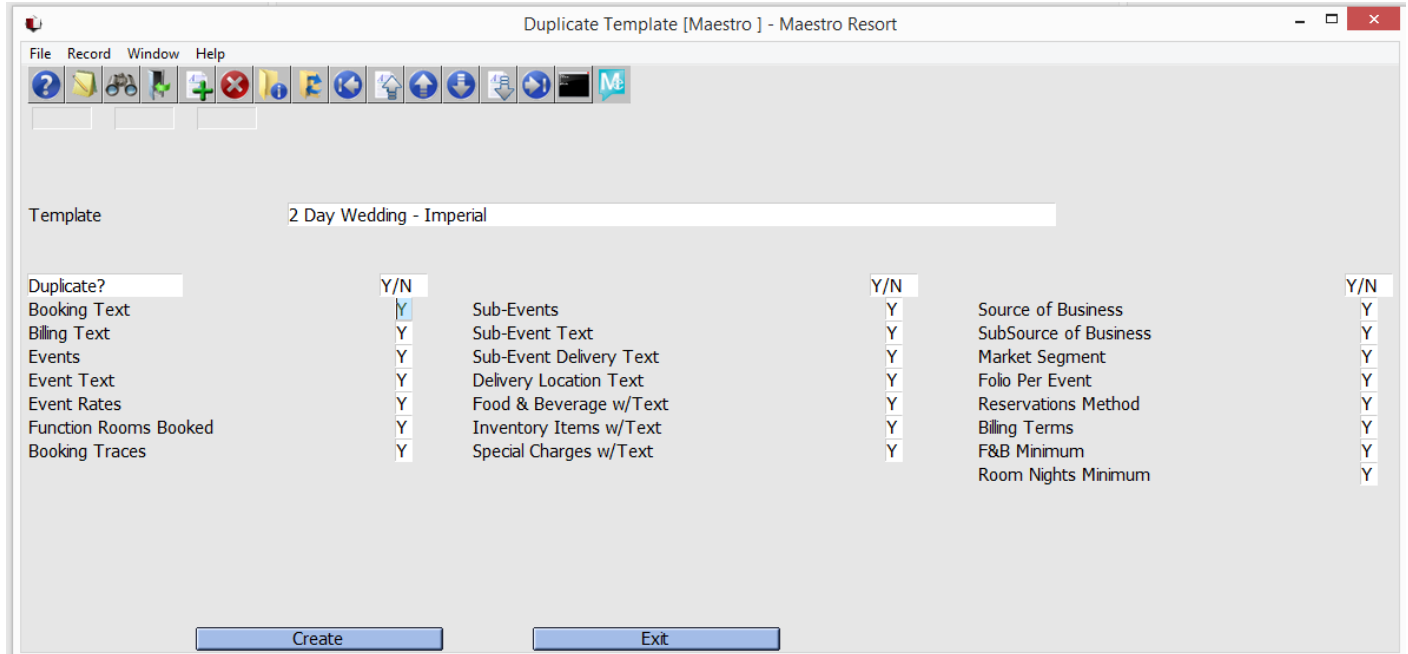
Day	Description	Evt#	FB	In	Sp	Rm	Event Total
1	Complete Meeting Package	1	Y	Y			128.46
2	Complete Meeting Package	2	Y	Y			128.46





## Copy or Duplicate a Template

Completed Templates can be duplicated and then modified for ease of creation. From the Window menu option, choose Duplicate Template. Users can then chose which fields from the current template they wish to copy to the new template. Enter “Y” yes, or “N” no, for the fields to be copied from the current Template to the new Template.



## Modifications

To modify an existing template, simply highlight the desired template, F5 to drilldown into the template or from the menu chose Edit > Edit Template. Any desired entry areas can then be modified.

## Deletion

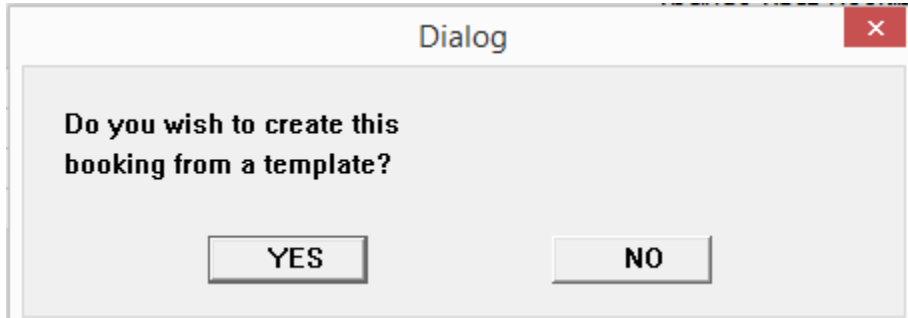
If a Template is deemed no longer required it can be deleted (F7 or Icon). If a template is modified or deleted, it has no impacted on bookings created using the template.

Users can create as many Templates as desired.

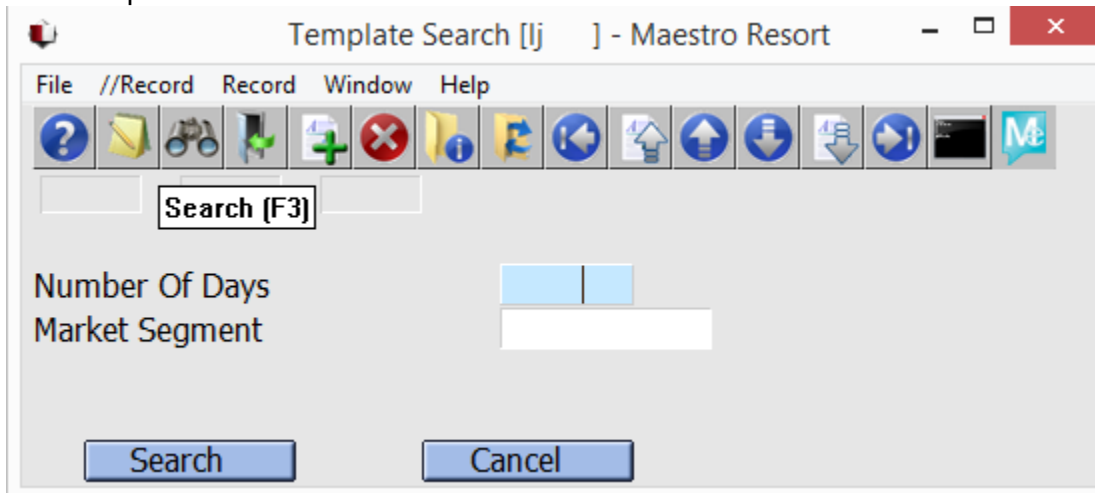
## Making a Booking with a Template

Once Templates have been created, when making a Booking the user will be presented with a Dialog box asking if they wish to use a template for their booking or not.

This dialog box will appear when converting an Inquiry to a Booking, there is a “Bookw/Template” button on the GRC/Function Room Availability screen, and when user chooses New Booking from the Make/Edit Booking Screen.



When the YES option is chosen, the user is then presented with the Template Search screen. Search can be performed based on the Number of Days the template is configured for, or the Market Segment assigned to the template. Available Market Segments can be viewed with an F8 look up in the field.



If both search options are left blank, all templates configured will be presented. 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.



Booking Templates [lj ] - Maestro Resort

File Record Edit Window Event Help

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Corporate Meeting Georgian A	1	5603	COR
Dinner / Breakfast / Lunch	2	5641	COR
Full Day Tuscan Package	1	5694	COR
Complete Meeting Package 2 Day	2	5728	COR
Full Day Tuscan Package - with	1	5740	COR
Corporate Retreat	1	5773	COR
Complete Meeting Package - 3 D	3	5799	COR
Complete Meeting Package 2 Day	2	5800	COR

Enter on the Template desired. The Create Booking from Template screen, then allows for entry of the new bookings details

- From / To Date
- Client Code – F8 will allow for Client Profile Look up and search
- Gtd number of Adults
- User can then choose “Y” yes or “N” no for the items to be copied from the template to the new booking. All default to “Y”
- Once completed, click Create to launch new Booking, or Exit to abandon.

Create Booking from Template [lj ] - Maestro Resort

File Record Window Help

03/15/2017     03/16/2017

59998  
 Northwind Communications  
 50

Duplicate?	Y/N		Y/N		Y/N
Booking Text	Y	Sub-Events	Y	Source of Business	Y
Billing Text	Y	Sub-Event Text	Y	SubSource of Business	Y
Events	Y	Sub-Event Delivery Text	Y	Market Segment	Y
Event Text	Y	Delivery Location Text	Y	Folio Per Event	Y
Event Rates	Y	Food & Beverage w/Text	Y	Reservations Method	Y
Function Rooms Booked	Y	Inventory Items w/Text	Y	Billing Terms	Y
		Special Charges w/Text	Y	F&B Minimum	Y
				Room Nights Minimum	Y





When the Create option is chosen, the Booking will appear with the defaults from the Template as selected.

Booking [lj ] - Maestro Resort

File Record Edit Window View Event Form Reports Audit Help

Booking# 5901 Status QT QUOTE Owner Prop QL BEO Status NEW  
 Acct Managr LJ Conf Serv Mgr Acct Mgr Text N  
 Client 59998 Northwind Communications Client Text Y  
 Bill To 59998 Description Complete Meeting Package 2 Day Srce of Bus GROUP Booking Text Y Trace  
 Contact Sub Src of Bus CORP Billing Text  
 Onsite Cntct Bill Terms TBD Date Created 12/13/2016  
 Mkt Segment COR Decision Date 12/27/2016  
 Follo/Event N Inquiry Number  
 Contract Due 12/27/2016  
 Min F&B Revenue  
 Min Room Nights  
 Waitlist Rooms N

Start	Date	Time	Day	Expected	Guaranteed
	03/15/2017	08:00am	WED	50	50
End	03/16/2017	06:00pm	THU		

Adults Children

Group Res #  
 Room Nights  
 Guest ADR  
 Res Method RM LIST  
 Cutoff Days/Date  
 Cutoff Cycle

Group Res Group Block Special Rate Charge Routing Rooming List

Event Date	Event	Evt#	FB	In	Sp	Rm	G Adt	G Chld	Event Total	Ad
03/15/2017	Complete Meeting Package	1	Y	Y			50		3,506.00	
03/16/2017	Complete Meeting Package	2	Y	Y			50		3,506.00	

### 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 conflict. The booking will be created and the user can resolve the conflict.

In the below example, the Meeting room on the Template is already booked, so the Meeting room has been placed on Waitlist for the newly created booking.

Possible conflicts are expired items (menu), meeting room assigned to template is unavailable, Gtd number of adults exceeds capacity of assigned meeting room.

Booking Creation Error Detail [lj ] - Maestro Resort

File Record Help

Booking Number 5902

Event#	SubEv#	Event Date	Bld	Room	Menu Code	Description
1		12/14/2016	QL	GEORGIAN A		Room is waitlisted