



Sales & Catering Booking Templates

Quick Reference Guide

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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.

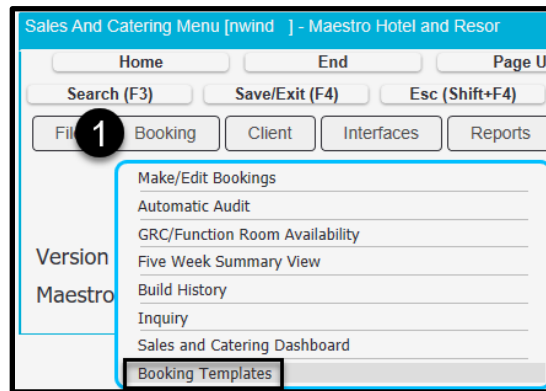
The reader should be familiar with the following Maestro functions:

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



I. Access and Create

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



I.I Booking Templates Screen

Booking Templates [nwind] - Maestro Hotel and Resort			
Training 5.5 DB 40ms			
Home End Page Up			
Search (F3) Save/Exit (F4) Esc (Shift+F4)			
File 1 Booking Client Interfaces Reports			
Version			
Maestro			
Make/Edit Bookings			
Automatic Audit			
GRC/Function Room Availability			
Five Week Summary View			
Build History			
Inquiry			
Sales and Catering Dashboard			
Booking Templates			

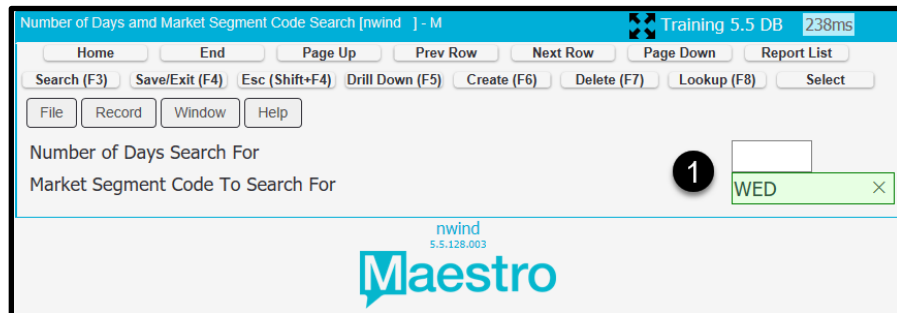
Booking Templates [nwind] - Maestro Hotel and Resort			
Training 5.5 DB 40ms			
Home End Page Up Prev Row Next Row Page Down Report List			
Search (F3) Save/Exit (F4) Esc (Shift+F4) Drill Down (F5) Create (F6) Delete (F7) Lookup (F8) Select			
File Record Edit Window Event Help			
Description	Days	Template#	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:	
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nwind 5.5.128.003
Maestro

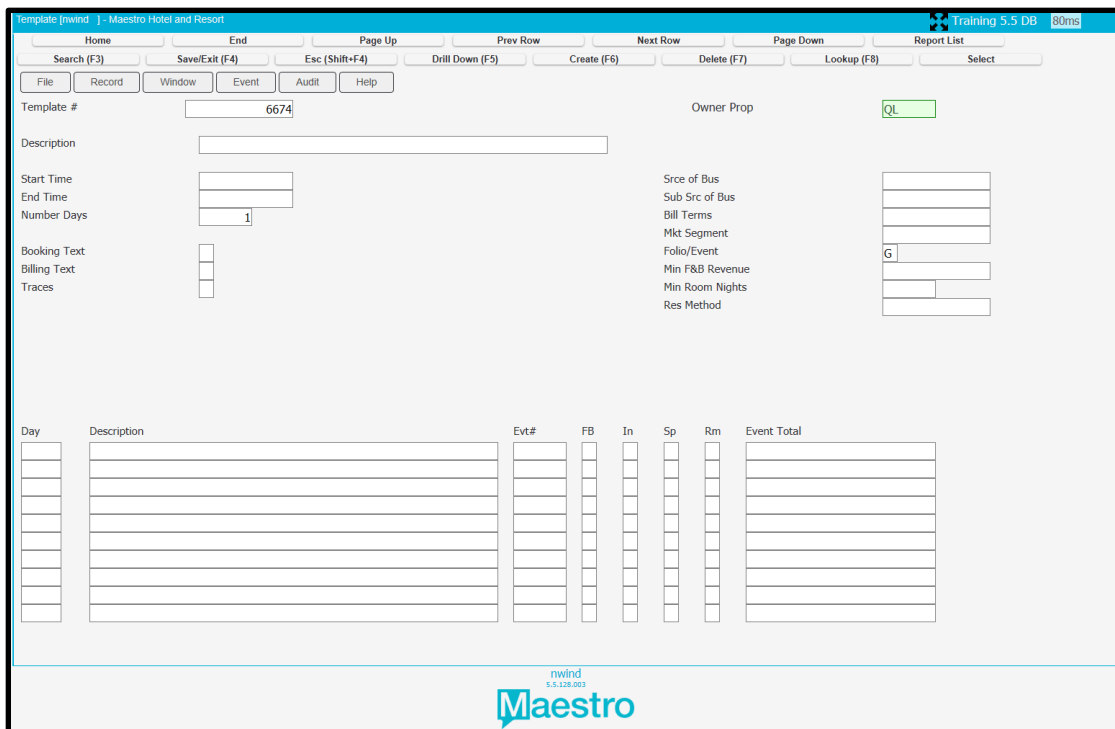
Field	Action / Purpose of Field
Description	Displays the description of the booking template
Days	The number of days this booking template will cover
Template #	The template ID #
MrktSgmt	The Market Segment the booking template is for - OPTIONAL
Search Desc:	Input any combination of letters that might 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

Template [nwind] - Maestro Hotel and Resort Training 5.5 DB 7ms

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 Audit Help

Template # 5779 Owner Prop QL

Description 2 Day Wedding

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	159.30
2	Wedding & Reception	2	Y	Y		4	1,405.74

- 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
<u>Template #</u>	Unique ID # for each template – Maestro auto-generates
<u>Owner Prop</u>	Property this Template is to be used in (only important in a multi-property environment)
<u>Description</u>	This will default as the booking and event descriptions
<u>Start Time</u>	The earliest start time for the daily events to begin
<u>End Time</u>	The latest end time for the daily events to end, latest allowed 11:59PM
<u>Number Days</u>	Input the number of days this booking will encompass Sales and Catering Events*
<u>Booking Text</u>	Drilldown (F5) – Text that will apply to all bookings utilizing this template
<u>Billing Text</u>	Drilldown (F5) – Billing Text that will apply to all bookings utilizing this template
<u>Traces</u>	Drilldown (F5) – Add generic traces required for this specific template
<u>Srce of Bus</u>	Lookup (F8) – Add to the template if the Source of Business will always be the same for this template
<u>Sub Src of Bus</u>	Lookup (F8) – Add to the template if the Sub Source of Business will always be the same for this template
<u>Bill Terms</u>	Lookup (F8) – Add to the template if the Billing Terms will be the same for all bookings utilizing this template
<u>Mkt Segment</u>	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
<i>*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</i>	

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

I.4 Corporate Sample

Template [nwind] - Maestro Hotel and Resort Training 5.5 DB 101ms

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 Audit Help

Template # 5800 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

Src of Bus

Sub Src of Bus

Bill Terms

Mkt Segment

Folio/Event

Min F&B Revenue

Min Room Nights

Res Method

GROUP

CORP

TBD

COR

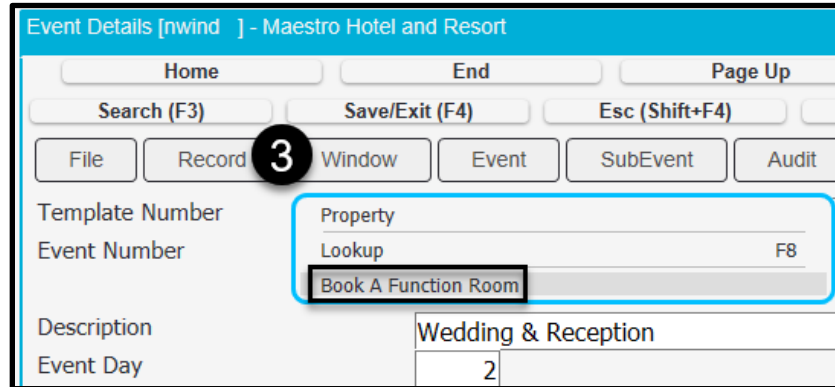
N

RM LIST

Day	Description	Evt#	FB	In	Sp	Rm	Event Total
1	Complete Meeting Package	1	Y	Y		Y	2,489.85
2	Complete Meeting Package	2	Y	Y			149.85

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

- 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



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



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



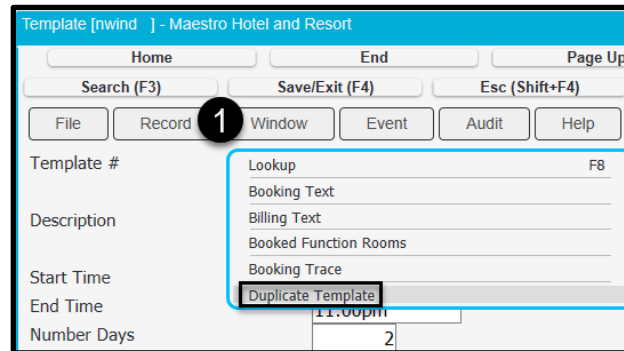
- 9) **Drilldown (F5)** on the Event and Event Delivery Text and add generic information if required



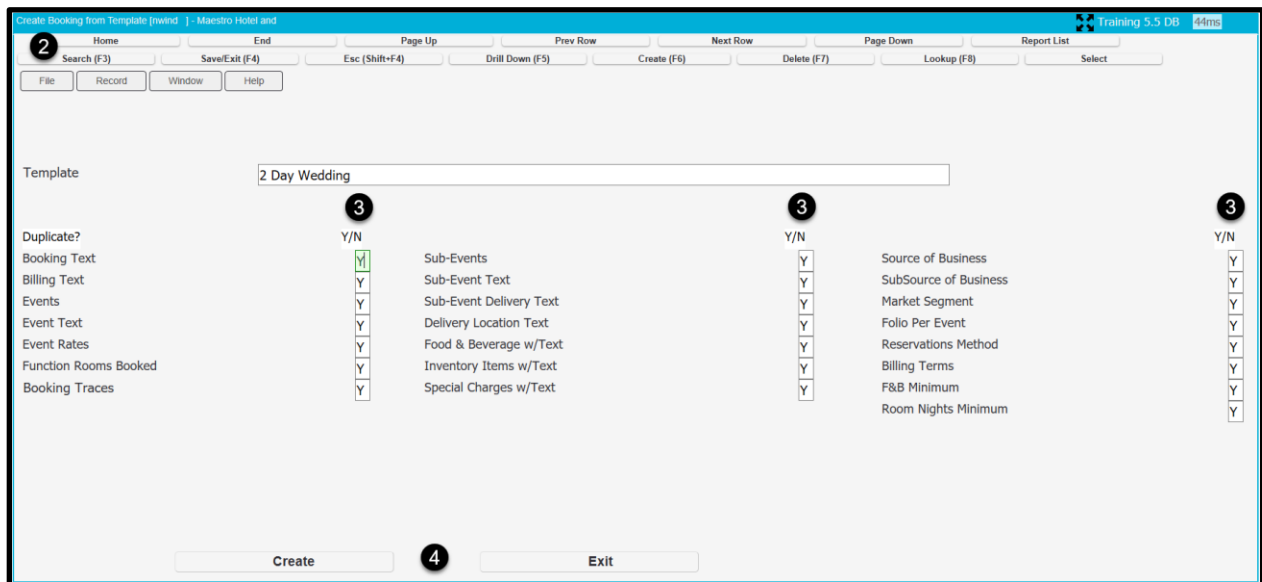
2. Duplicate (or Copy) a Template

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



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

- 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 #

Booking Duplicated [nwind] - Maestro Hotel and Resort Training 5.5 DB 500ms

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 Help

Template Number **5** 6674 has been created

OK

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**

Booking Templates [nwind] - Maestro Hotel and Resort Training 5.5 DB 122ms

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

Search (F3) Save/Exit (F4) Esc (Shift+F4) **3** Drill Down (F5) Create (F6) Delete (F7) Lookup (F8) Select

File Reco **3** Edit Window Event Help

Description	Create New Template F6	Days	Template#	MrktSgmt
2 Day Wedding	Edit Template F5	2	5615	
Christmas Party		2	5625	SOCIAL
Dinner Event		1	5629	SOCIAL

- 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

Description	Days	Template#	MrktSgmt
2 Day Wedding	2	5615	
Christmas Party	2	5625	SOCIAL

- 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

Date: 03/12/2020

Book W/Template

- 3) When the user chooses **New Booking** from the **Make/Edit Booking** screen

Search For Booking By:

Include Past Bookings: ☐

LastName/Company:

Contact Name:

From Date: To Date:

Description:

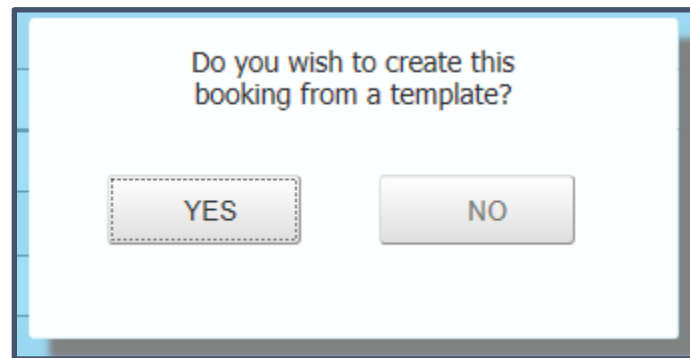
Booking Number:

Client Code:

Account Manager:

Conf Serv Mgr:

New Booking



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.

 The screenshot shows the "Template Search" window. The title bar reads "Template Search [nwind] - Maestro Hotel and Resort". The top right corner shows "Training 5.5 DB" and "16ms". The window contains a toolbar with buttons: Home, End, Page Up, Prev Row, Next Row, Page Down, and Report List. Below this is a second row of buttons: Search (F3), Save/Exit (F4), Esc (Shift+F4), Drill Down (F5), Create (F6), Delete (F7), Lookup (F8), and Select. A third row has File, //Record, Record, Window, and Help. The main area has two input fields: "Number Of Days" (labeled with a circled 1) and "Market Segment" (labeled with a circled 2). At the bottom are "Search" and "Cancel" buttons.

- 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

Booking Templates [nwind] - Maestro Hotel and Resort Training 5.5 DB 45ms

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 Edit Window Event Help

4

Description	Days	Template#	MrktSgmt
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
Inclusive Meeting Package	1	6058	COR
Inclusive Meeting Package - Co	1	6059	COR

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

Create Booking from Template [nwind] - Maestro Hotel and Training 5.5 DB 45ms

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 Help

From Date 1 09/14/2020 To Date 09/15/2020

Client Code 2 70137 X

LastName/Company Northwind Corporation

Gtd Adults 3 40

Duplicate? Y/N

Booking Text Y

Billing Text N

Events Y

Event Text Y

Event Rates Y

Function Rooms Booked Y

Sub-Events Y

Sub-Event Text Y

Sub-Event Delivery Text Y

Delivery Location Text Y

Food & Beverage w/Text N

Inventory Items w/Text Y

Special Charges w/Text N

Source of Business Y

SubSource of Business Y

Market Segment Y

Folio Per Event Y

Reservations Method Y

Billing Terms Y

F&B Minimum N

Room Nights Minimum Y

4

5 Create 5 Exit

- 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

Booking [nwind] - Maestro Hotel and Resort

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 Edit Window View Event Form Reports Audit Help

Booking# 6676 Status QTY QUOTE QL

Acct Manager NWIND Owner Prop Conf Serv Mgr

Client 70137 Northwind Corporation

Bill To 70137

Description Complete Meeting Package 2 Day

Contact

Onsite Cntct

Start Date 09/14/2020 Time 08:00am Day MON

End Date 09/15/2020 Time 06:00pm Day TUE

Adults 40

Children

Expected 40

Guaranteed 40

GROUP CORP

Sub Src of Bus TBD

Bill Terms COR

Mkt Segment G

Folio/Event

BEO Status NEW

Acct Mgr Text N

Client Text N

Booking Text Y Trace

Billing Text

Date Created 03/12/2020

Audit Status

Decision Date 03/26/2020

Inquiry Number

Contract Due 03/26/2020

Min F&B Revenue

Min Room Nights

Waitlist Rooms N

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#	FB	In	Sp	Rm	G Adit	G Chld	Event Total	Ad
09/14/2020	1		Y			40		67.50	
09/15/2020	2		Y			40		67.50	

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

Booking Creation Error Detail [nwind] - Maestro Hotel and

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 Help

Booking Number 6678

Event#	SubEv#	Event Date	Bld	Room	Menu Code	Description
1		06/22/2021	QL	IMPERIAL		Room is waitlisted
2		06/23/2021	QL	IMPERIAL		Room is waitlisted

- 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



Booking [nwind] - Maestro Hotel and Resort

Training 5.5 DB 491ms

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 Edit Window View Event Form Reports Audit Help

Booking# 6678 Status QT QUOTE Owner Prop QL

Acct Manager NWIND

Client 61548 Northwind - Training Services

Bill To 61548

Description Complete Meeting Package 2 Day

Contact

Onsite Cntct

BEQ Status NEW

Acct Mgr Text N

Client Text N

Booking Text Y Trace

Billing Text

Date Created 03/12/2020

Audit Status

Decision Date 03/26/2020

Inquiry Number

Contract Due 03/26/2020

Min F&B Revenue

Min Room Nights

Waitlist Rooms

Start Date 06/22/2021 Time 08:00am Day TUE

End Date 06/23/2021 Time 06:00pm Day WED

Adults Expected 20

Children

Guaranteed 20

2

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