Sales and Catering – Booking Traces
Quick Reference Guide

Introduction

This Quick Reference Guide will explain how Booking Traces can be utilized in the *Sales and Catering* Module, how they are generated, and how they can be maintained. It is assumed that the user is able to complete the Booking process.

Procedure

Booking Traces in *Sales and Catering* give the user the ability to assign tasks to themselves, or other users, via a Booking. These traces can be helpful in maintaining due dates and task completions that need to be attended to for a specific Booking.

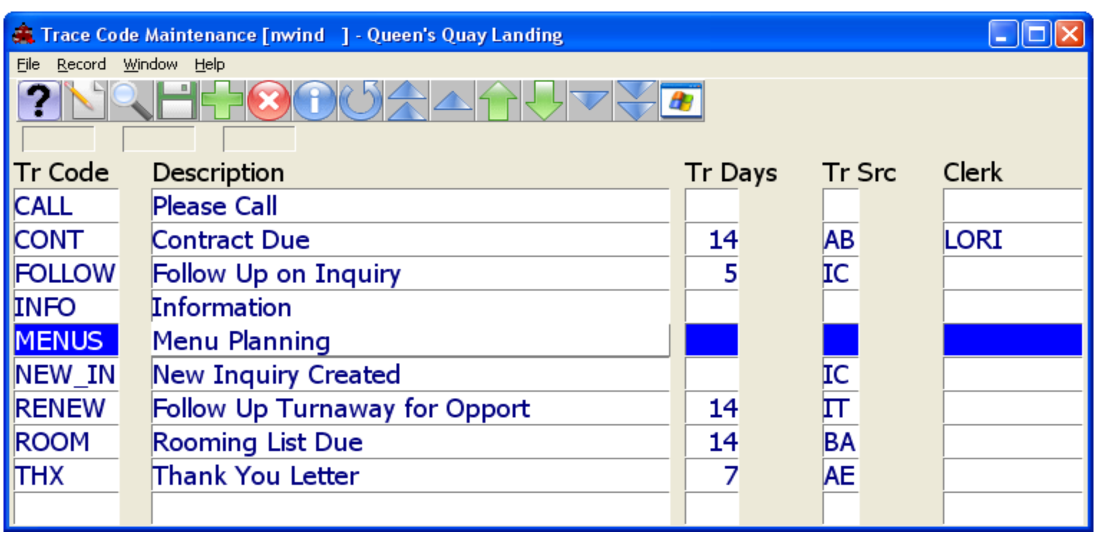
There are four steps to successfully create and manage your *Sales and Catering* Booking Traces. You must first log into *Sales and Catering Maintenance* and recognize which traces are being automatically created with the creation of a Booking.

Example: There are four steps to effectively utilize traces*:*

Step One – Create the traces that you would like to use in *Sales and Catering Maintenance*
Step Two - Define which traces are to be automatically generated when creating a Booking.
Step Three – Delete or assign any traces based on your bookings specifics.
Step Four – Retrieve Traces and complete tasks assigned

Step One, Creating Traces in Sales and Catering Maintenance

In order to view that Traces that have been created for *Sales and Catering* Bookings, you must log into *Sales and Catering Maintenance.* Select from the menu bar *Codes | Trace Code Maintenance.* The below screen will appear.

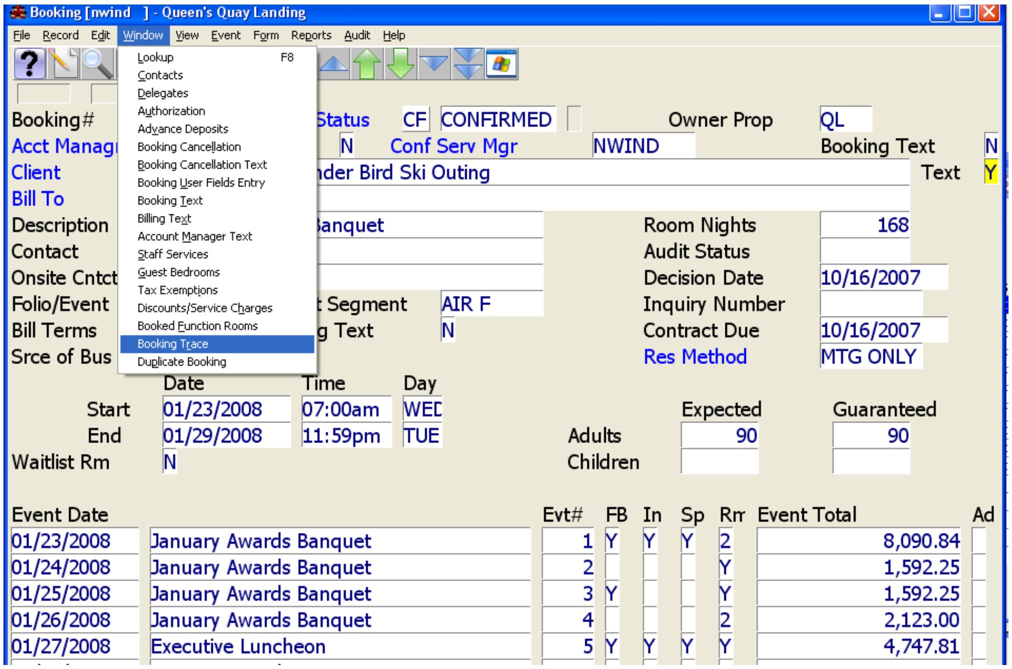


Tr Code	Description	Tr Days	Tr Src	Clerk
CALL	Please Call			
CONT	Contract Due	14	AB	LORI
FOLLOW	Follow Up on Inquiry	5	IC	
INFO	Information			
MENUS	Menu Planning			
NEW_IN	New Inquiry Created		IC	
RENEW	Follow Up Turnaway for Opport	14	IT	
ROOM	Rooming List Due	14	BA	
THX	Thank You Letter	7	AE	

In the above example, a trace code has been created for a MENU PLANNING meeting.

- The code has been titled “MENUS”.
- The description will appear on Trace Reports for you to review, but can also be expanded on to allow for more specifics.
- A blank entry in the ‘Tr Days’, ‘Tr Src’ and Clerk fields allow you to specify when and to whom this trace will be sent, dependent upon the booking.

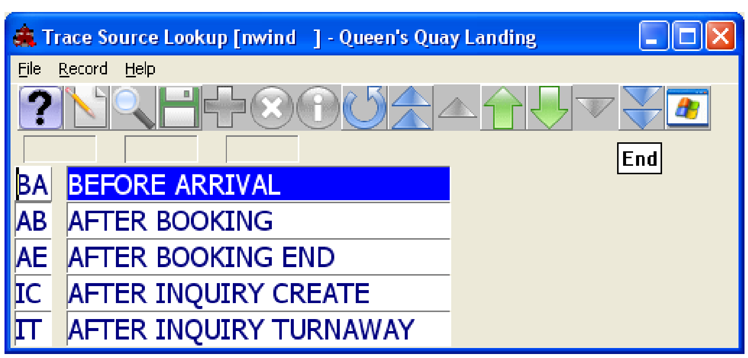
Booking Traces can be accessed from within a Booking, located under *Window* | *Booking Traces.*



Step Two, Defining Automatically Created Booking Traces

After the Traces have been created, you must decide which Booking Traces should be automatically generated from the creation of a Booking.

- ‘Tr Days’ recognizes the number of days relative to the ‘Tr Src’ that the trace will be sent.
- ‘Tr Src’ is the Source of the Trace. The below screenshot displays the options available.
- The ‘Clerk’ field allows you to specify which individual or group will receive the trace. If this field is left blank, the Booking Account Manager will receive the trace.

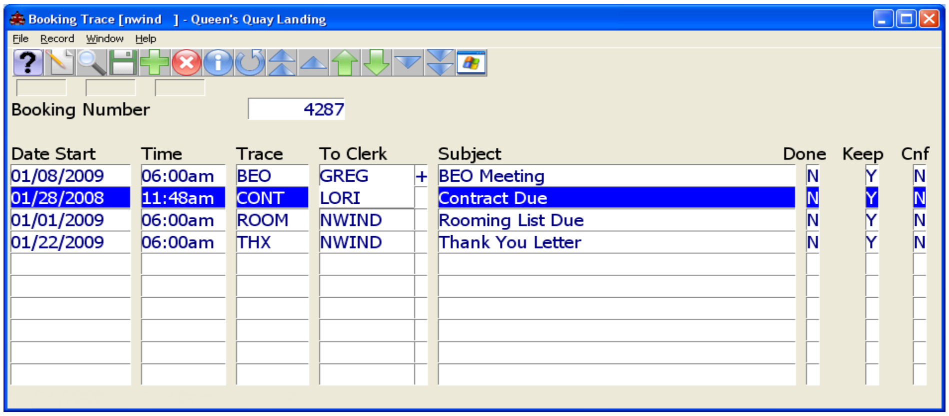


There are 5 ‘Tr Src’ Options. In the above Example, a “***Contract Due***” trace has been created, and will be sent to “***Lori***”, “***14 Days***” “***AB***” (After the Booking is created).

All other Booking Traces that are automatically generated by populating a Trace Day and Source will appear on your Booking once it is created.

Step Three, Delete or Assign Traces Based on Booking Specifics

Once a Booking has been generated, you can see the automatic Traces by accessing the *Window* │*Booking Traces.*



A booking was created for 01/15/2009 on 01/14/2008. Lori will therefore get a reminder that the Contract is Due 14 Days after the Booking has been created, or on 01/28/2008.

In this case, there are 4 Automatic Booking Traces. The first two were assigned, Greg. The '+' signifies that there are additional clerks receiving this messages and that it was sent to a group (the Catering department in this case). The second trace is assigned to Lori. The third and fourth were not assigned to a specific clerk or group, so they defaulted to the Account Manager, which in this case is NWIND.

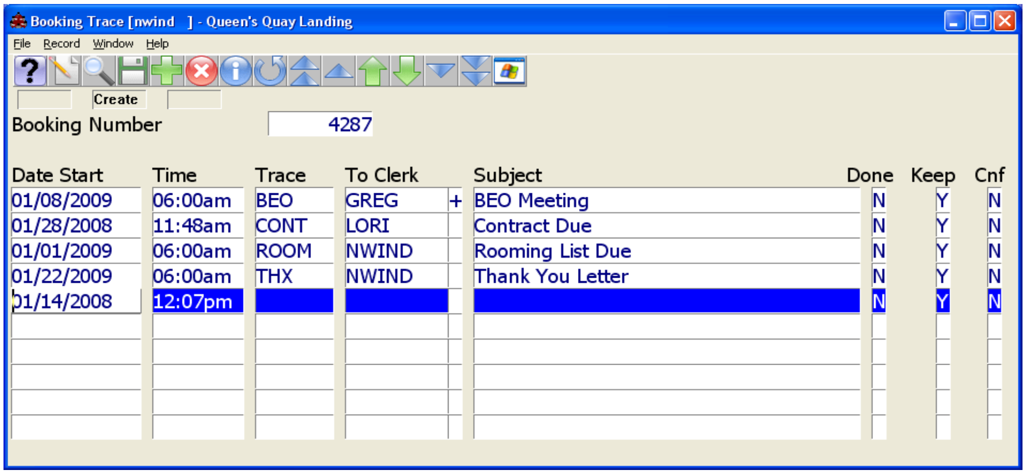
You can manage your Traces within a booking a number of ways. You can:

- DELETE A TRACE
- ASSIGN A TRACE
- ADD ADDITIONAL TRACES
- MARK A TRACE DONE

DELETING A TRACE - Place your cursor on the Trace and Deleting (F7). This would be in the case that in the above example, there were no bedrooms required, and a Rooming List reminder was not needed.

ASSIGNING A TRACE – Place you cursor on the "To Clerk" within the Trace and do a "Lookup" (F8). You will then be presented with the choice of a Clerk or Group. Select one, and "Enter" on the Clerk or Group code to assign the Trace.

ADD ADDITIONAL TRACES – With the Booking Trace screen open, "Create" (F6).



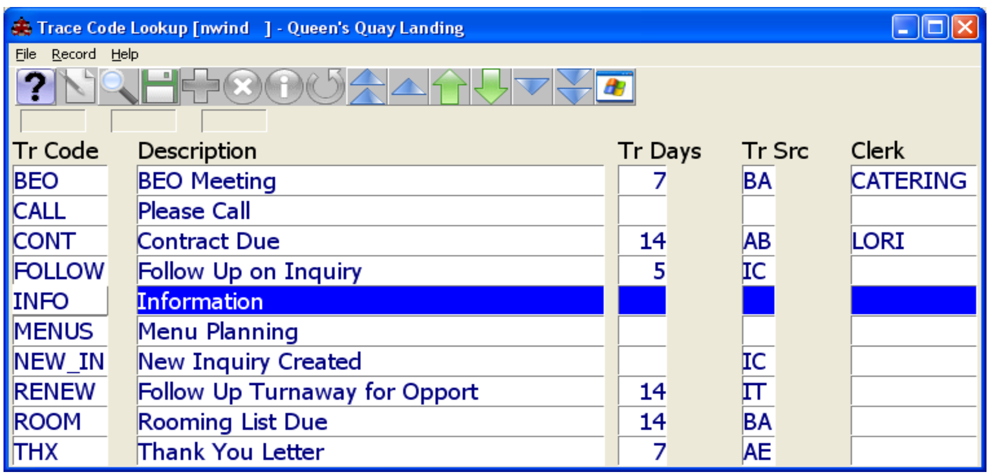
Booking Trace [nwind] - Queen's Quay Landing

Booking Number 4287

Date Start	Time	Trace	To Clerk		Subject	Done	Keep	Cnf
01/08/2009	06:00am	BEO	GREG	+	BEO Meeting	N	Y	N
01/28/2008	11:48am	CONT	LORI		Contract Due	N	Y	N
01/01/2009	06:00am	ROOM	NWIND		Rooming List Due	N	Y	N
01/22/2009	06:00am	THX	NWIND		Thank You Letter	N	Y	N
01/14/2008	12:07pm					N	Y	N

Today's Date will populate, and this can be changed to the desired date. "Enter" through to the "Trace" field and "Lookup" (F8), to select the Trace you wish to create.

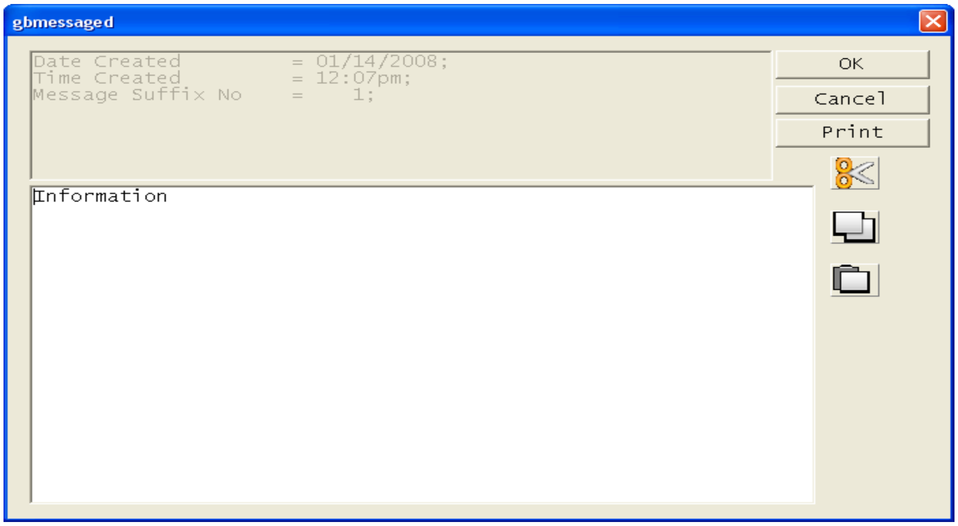
You will be presented with the list of Trace options that were created in *Sales and Catering Maintenance.* Choose a trace and assign a clerk if needed (see above).



Trace Code Lookup [nwind] - Queen's Quay Landing

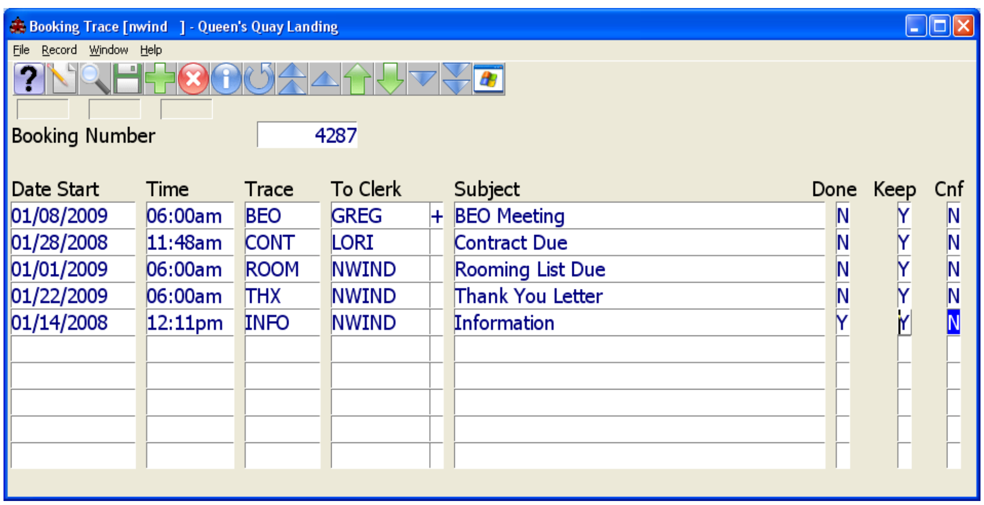
Tr Code	Description	Tr Days	Tr Src	Clerk
BEO	BEO Meeting	7	BA	CATERING
CALL	Please Call			
CONT	Contract Due	14	AB	LORI
FOLLOW	Follow Up on Inquiry	5	IC	
INFO	Information			
MENUS	Menu Planning			
NEW_IN	New Inquiry Created		IC	
RENEW	Follow Up Turnaway for Opport	14	IT	
ROOM	Rooming List Due	14	BA	
THX	Thank You Letter	7	AE	

Once you "Enter" on the Trace of your choice, and continue to "Enter' through the fields, you will be presented with the below Text Box. This will allow you to expand further on the details of you Trace. This is a free form type screen.



MARKING A TRACE DONE – By placing a “Y” in the “Done” field in the Booking Traces, the Trace will not be sent trough Trace messaging. This is beneficial in the event that you would like to leave some information about the Booking on file, or if the Trace was completed right away.

It is suggested to always keep Traces (leaving the “Keep” field a “Y”) so that you have record of what was completed and what notes were made about the booking for reference.



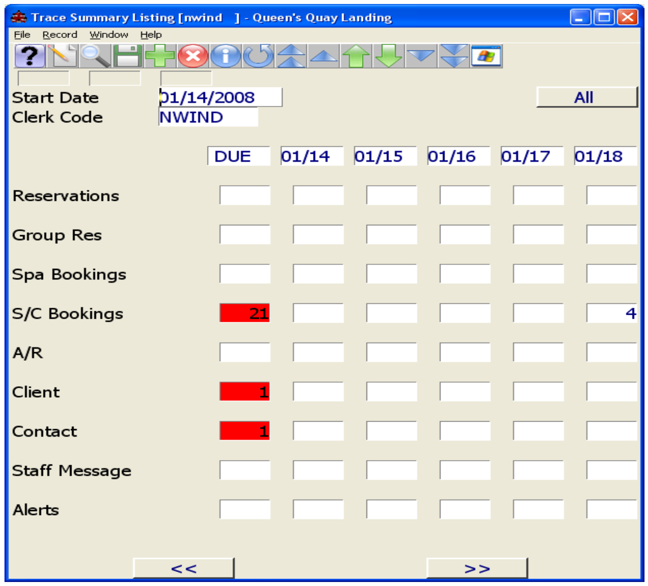
Step Four, Retrieve Traces and Complete Tasks Assigned

Lastly, you need to recognize your outstanding Traces and mark them “Done” as they are completed.

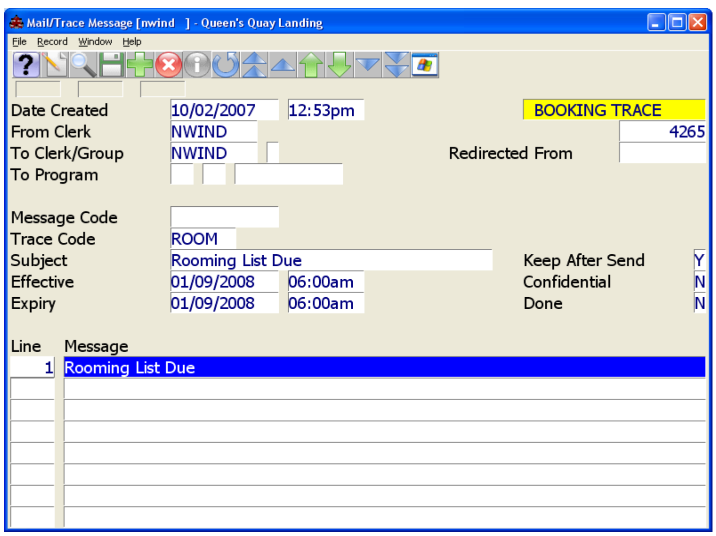
There are 3 ways to retrieve and manage your Booking Traces.

- TRACE SUMMARY
- THE *Sales and Catering* DASHBOARD
- TRACE MESSAGE REPORT

TRACE SUMMARY – This is accessed from *File* | *Trace Summary.* In the below case there are 21 outstanding Booking Traces for 01/14/2008.

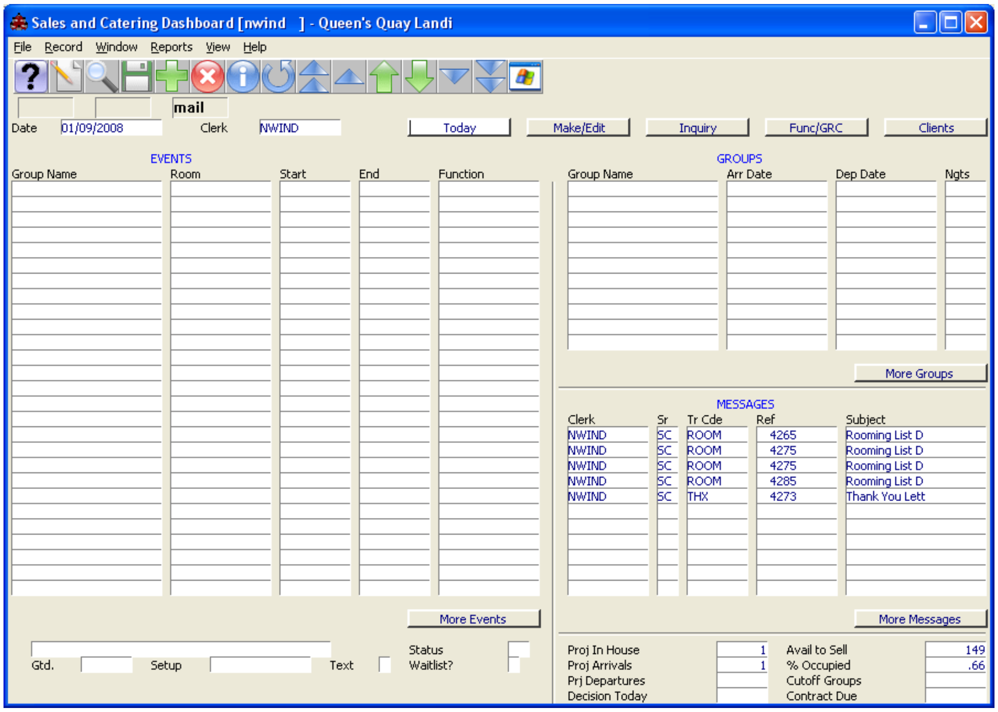


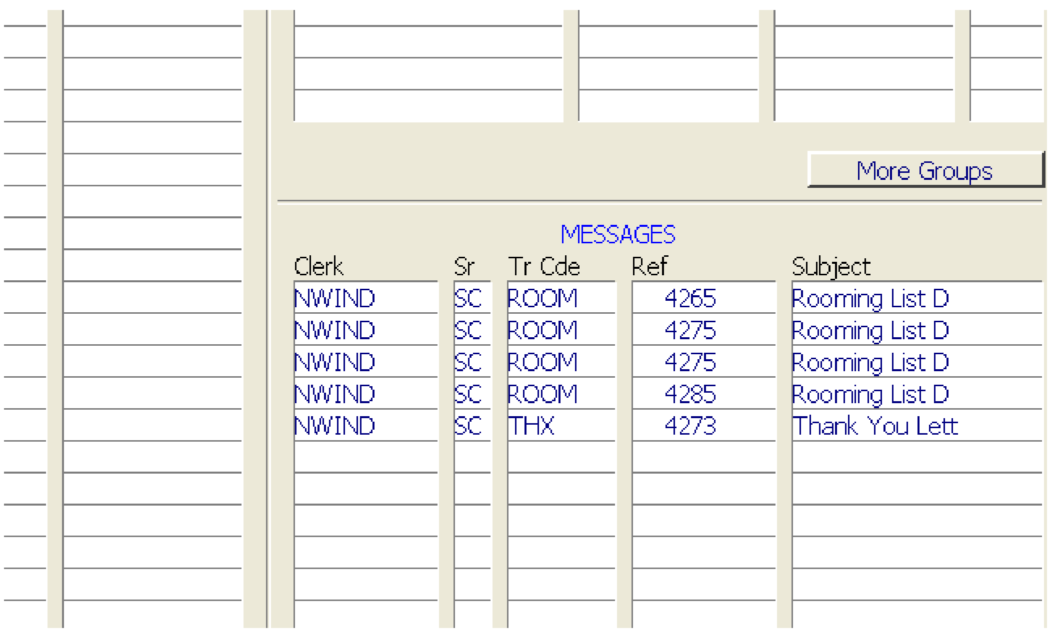
To access these traces "Drill Down" (F5) on the 21. A list of the 21 Traces will appear, and you can "Drill Down" (F5) on any and see the Trace detail.



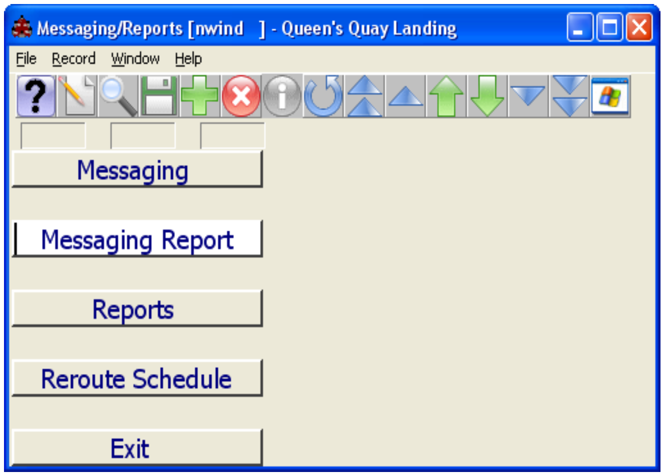
The top right corner reveals that it is a Booking Trace, for Booking number 4265, and a reminder that the Rooming list was due on 01/09/2008.
You can then manage this Trace from within the Booking by marking it "Done", (see above), or it can be recognized as completed by marking it with a "Y" in the "Done" field in the above screen.

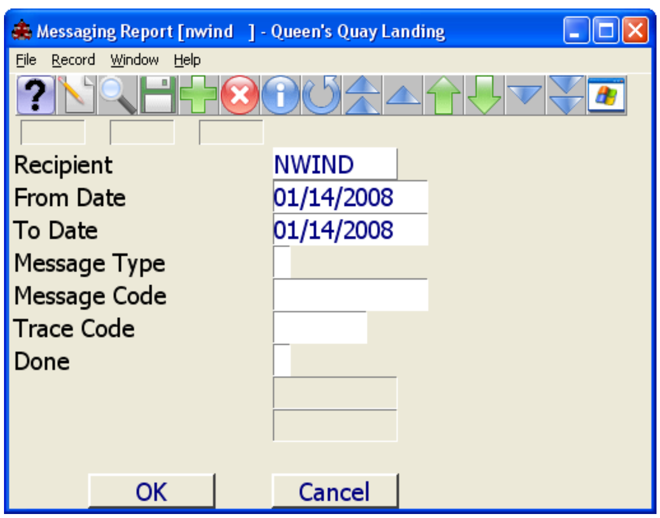
SALES AND CATERING DASHBOARD – The *Sales and Catering* Dashboard can be accessed from the main screen by going to *Booking │ Sales and Catering Dashboard.*
The below screen will appear. The bottom right section is a summary of all the outstanding traces for the day in question. You can "Drill-down" (F5) on any of the traces and access the same above screen.


Sales and Catering Dashboard [nwind] - Queen's Quay Landi
File Record Window Reports View Help
mail
Date 01/09/2008
Clerk NWIND
Today
Make/Edit
Inquiry
Func/GRC
Clients
EVENTS
Group Name
Room
Start
End
Function
GROUPS
Group Name
Arr Date
Dep Date
Ngts
More Groups
MESSAGES
Clerk Sr Tr Cde Ref Subject
NWIND SC ROOM 4265 Rooming List D
NWIND SC ROOM 4275 Rooming List D
NWIND SC ROOM 4275 Rooming List D
NWIND SC ROOM 4285 Rooming List D
NWIND SC THX 4273 Thank You Lett
More Events
More Messages
Gtd.
Setup
Text
Status
Waitlist?
Proj In House 1
Proj Arrivals 1
Prj Departures
Decision Today
Avail to Sell 149
% Occupied .66
Cutoff Groups
Contract Due


More Groups
MESSAGES
Clerk Sr Tr Cde Ref Subject
NWIND SC ROOM 4265 Rooming List D
NWIND SC ROOM 4275 Rooming List D
NWIND SC ROOM 4275 Rooming List D
NWIND SC ROOM 4285 Rooming List D
NWIND SC THX 4273 Thank You Lett

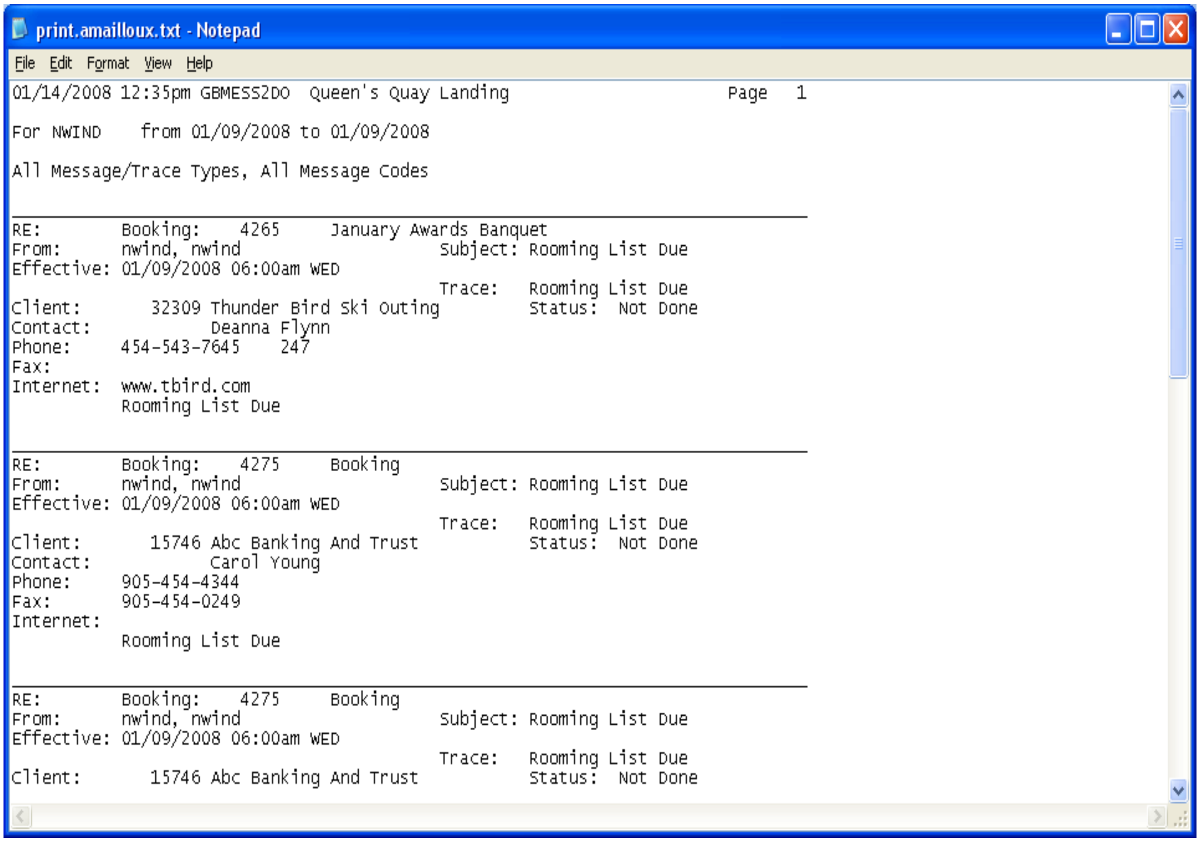
TRACE MESSAGE REPORT – This report can be accessed from *File* | *Mail Reports.* The following screen will appear.





This screen will default the logged-in user in the 'Recipient field, but you are able to review your colleagues traces in the event that they are absent by using the F8 lookup and selecting their user name. You can select either a date range to print or a specific Message Type. A blank selection will print all. You may also include your traces that have been completed within this date range.

The below Messaging Report can be printed and used to complete all tasks for which you have received a trace. After completed, these traces can then be retrieved and marked “Done”.



print.amailloux.txt - Notepad

File Edit Format View Help

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01/14/2008 12:35pm GBMESS2DO  Queen's Quay Landing                      Page   1

For NWIND    from 01/09/2008 to 01/09/2008

All Message/Trace Types, All Message Codes

________________________________________________________________________________
RE:         Booking:    4265     January Awards Banquet
From:       nwind, nwind                      Subject: Rooming List Due
Effective: 01/09/2008 06:00am WED
                                              Trace:   Rooming List Due
Client:        32309 Thunder Bird Ski Outing           Status:  Not Done
Contact:             Deanna Flynn
Phone:      454-543-7645    247
Fax:
Internet:   www.tbird.com
            Rooming List Due

________________________________________________________________________________
RE:         Booking:    4275     Booking
From:       nwind, nwind                      Subject: Rooming List Due
Effective: 01/09/2008 06:00am WED
                                              Trace:   Rooming List Due
Client:        15746 Abc Banking And Trust             Status:  Not Done
Contact:             Carol Young
Phone:      905-454-4344
Fax:        905-454-0249
Internet:
            Rooming List Due

________________________________________________________________________________
RE:         Booking:    4275     Booking
From:       nwind, nwind                      Subject: Rooming List Due
Effective: 01/09/2008 06:00am WED
                                              Trace:   Rooming List Due
Client:        15746 Abc Banking And Trust             Status:  Not Done
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