

SALES AND CATERING USER GUIDE





SALES AND CATERING

USER GUIDE



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Maestro

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SALES AND CATERING USER GUIDE



1 Welcome to the Northwind Maestro Sales and Catering!

Although all the systems in Northwind Maestro are used for different purposes, they all share the same structure. Once you understand the basics of one system, you've learned the basics of all. This chapter discusses the basic keystrokes and functionality used throughout all systems. In addition, Northwind Maestro is supported on multiple hardware platforms in three very distinct ways. These included: Microsoft Windows, UNIX, and UNIX with Windows TTY. The main differences are as follows:

Microsoft Windows

- Uses a graphical user interface with mouse control.
- Uses a menu bar with pull down selection options.
- Uses a button bar for quick access to commonly used functions.

UNIX

- Uses a text based interface.
- Uses a menu bar with pull down selection options.

UNIX with Windows TTY

• Uses a text based interface with mouse control.

MAESTRO SALES & CATERING provides the features to:

- assist your sales and marketing efforts with comprehensive client contact and history information
- manage function room bookings with tracking of food & beverage, inventory, and special charges
- fill "off premises" catering orders easily and accurately
- integrate with other systems for unlimited reporting and financial analysis

MAESTRO SALES & CATERING is integrated with the account management function of accounts receivable. This provides a method of tracking advance deposits, conference related charges and payments. In addition, the account management can be further implemented to be a part of the fully integrated accounts receivable program.

The following chapters outline the capabilities of MAESTRO SALES & CATERING in more detail and include a step by step section to help you learn MAESTRO SALES & CATERING





1.1 Logging In to Maestro Sales and Catering

To Log in:

1) Choose the Sales and Catering Icon (**without** the red cross). Every Staff member for Sales and Catering will have a unique Clerk Id and Password. It is usually the first initial and last name. Enter your Clerk Id here.



- 2) Use the tab key to get to the password field.
- 3) Enter Password if applicable
- 4) Press Ok or Enter. You will then be in the Main Sales and Catering Menu, with the Giraffe.

| Clerk Login | | X |
|-------------|-------|--------|
| Clerk | nwind | OK |
| Password | NNNN | Cancel |
| | | |





1.2 Getting Started

Regardless of which of the three user interfaces you may be using, (**Menu Bar, Button Bar, or Keyboard**) the functionality of the software is similar and the function keys and menu bar will operate in the same manner. The standard supported keyboard on all three platforms is the 101 key keyboard common on personal computers and ASCII terminals. This keyboard incorporates twelve (12) function keys (F1 through F12) which each command the software to perform a specific function.

This user guide assumes that you have prior knowledge of the keyboard and mouse (where applicable). If you are unsure as to the operation of your keyboard or mouse under windows, please refer to the appropriate user guides supplied with those products

1.3 Function Keys

Each function key has a specific function which it performs regardless of which window is currently being used. For example, F6 (create) will create a new client in client maintenance, but will also create a new booking in booking inquiry. This means that once you are familiar with the purpose of a function key, you can carry that knowledge throughout the system.

Each function key also has a functional equivalent available from the menu bar. For example, F7 (delete) can also be performed by selecting the menu name Record from the menu bar and then the command Delete. Throughout the users guide, references will be made to the menu bar. Using the example given previously would be represented as *Record* | *Delete*. Although this is the method used in the user guide, you may use the equivalent function key and windows users may also use the applicable button from the button bar.



F1 - Help

The **F1** function key will display context sensitive help. This is help that will describe the type of data expected to be entered in the current field.

Help may also be selected by clicking with the mouse on the Blue question mark button displayed on the button bar or by selecting *Help* | *Help*.







F2 - Edit

The **F2** function key will modify the input mode of a field. This works as follows: when a field is first keyed in it is blank and data is entered from left to right. If new data is to be keyed to entirely replace existing data in the same field, it may also be keyed at any time. Using the example of a client name "John Smyth", you want to replace the "Y" in Smyth with an "T" for Smith. Since only a certain part of the field is to be changed, it is natural to press the right arrow to move across the field to reach the appropriate letter. A right arrow is interpreted by the system as a command to move to the next field, therefore exiting the field to modify. F2 will indicate to the system to enter "Edit" mode which interprets right and left arrows as a command to move one character to the right or left respectively. Once the edited field has been excited, the system will revert back to the previous field to field mode.

Edit Mode may also be selected by clicking with the mouse on the Paper and Pencil icon displayed on the button bar or by selecting *File* | *Edit Mode*.



F3 - Search

The **F3** function key will display a search window (where applicable) to allow you to search by a specific field. For example, search by "client last name" in client lookup.

Search may also be selected by clicking with the mouse on the Magnifying Glass icon displayed on the button bar or by selecting *File* | *Search*.



F4 - Return To Previous Window (Exit) (Shift + F4 - Abort without Saving)

The F4 function key will close the current window, and return to the previous window. Return to Previous may also be selected by clicking with the mouse on the Green Disc icon displayed on the button bar or by selecting *File* | *Return To Previous*.



NOTE: If a field has invalid data in it and you attempt to "Return to Previous", the field will be highlighted in red and the window will not close.

To correct this situation, you can modify the incorrect data, press **Shift + F4** or alternately *File* |Exit, to abort the change to this field and close the window. The last correct values from this field will be reset, or if creating new data, it will be aborted.

F5 – Drill Down

The F5 function key is supported in the system as a means to query additional relevant information to the current field.

Using the right button of the mouse will achieve the same result in Windows.





F6 - Create

The F6 function key will create a new record.

Create may also be selected by clicking with the mouse on the Green Cross icon displayed on the button bar or by selecting *Record* | *Create*.

NOTE: In some functions the Create command may be found under the menu name Window.

F6 Create



F7 - Delete

The F7 function key will delete the current entry. Prior to the delete taking effect, a dialog window will be displayed for confirmation.

Delete may also be selected by clicking with the mouse on the Red X icon displayed on the button bar or by selecting *Record* | *Delete*.



F8- Lookup Window

The F8 function key will display a lookup window for fields that have predefined options. For example, the country field of an address will have listed countries in the lookup window.

Window Lookup may also be selected by clicking with the mouse on the Blue "I" icon displayed on the button bar or by selecting *Window Window*.



F9- Undo Field

The F9 function key will undo changes made to a field since the last update. For example, if you start over keying a client name and want to reset the data, use this option.

Undo Field may also be selected by clicking with the mouse on the Blue Circular Arrow icon displayed on the button bar or by selecting *File* | *Undo Field*.



F 10 (Alt) – Access Menu Bar

The F10 function key retains the standard Windows and MS-DOS Shell function of accessing the Menu Bar. Windows also supports this function with the Alt key. When selected, the File Menu Name on the Menu Bar will be highlighted. To access the desired menu, press the underlined letter or use the right and left arrow keys to move from menu name to menu name. Once you are positioned on the desired Menu Name, press Enter or down arrow to see a list of the valid commands.

Note: By keying F10, F, S on the below screen, you will access the Search Option in the File Menu



NORTHWIND

| 🌲 Make/Edit Bookings [nwind] - Minerals Hotel | | | | | |
|--|-----------------------------|----|---------|--|--|
| <u>File</u> <u>R</u> ecord <u>W</u> indov | v <u>D</u> iary <u>H</u> el | þ | | | |
| Logout | | 2 | | | |
| <u>E</u> dit Mode | F2 | | | | |
| <u>U</u> ndo Field | F9 | | | | |
| <u>U</u> ndo Row | Shift+F9 | | Inc | | |
| <u>M</u> ail/Reports | | y: | Inc | | |
| <u>S</u> earch | F3 | | | | |
| Print Screen | F11 | | | | |
| <u>R</u> efresh Screen | F12 | | | | |
| Return to Pre <u>v</u> ious | F4 | | | | |
| Lost and Found | | | To Date | | |
| E <u>x</u> it | Shift+F4 | | TO Date | | |
| Eont | | | | | |

F11 - Print Screen

The F11 function key will prompt to print the data on the screen. When selected, a dialog window will be displayed prompting for relevant print information and confirmation. This print option will strip out all graphics from the printed output.

F12 - Refresh Screen

The F12 function key will force a screen refresh of all data displayed on the screen. This is useful only if data becomes illegible or screen colors become distorted as a result of network problems.

Navigation Icons -These correspond directly to the keys of the same names on the keyboard. These keys will function as follows:

Home

- In a multiple row list, will move to the top of the list.
- In a single record window, will display the first occurrence.



Page Up

- In a multiple row list, will move one window of data upwards.
- In a single record window, will display the previous occurrence.







Up

- In a multiple row list, will move one row of data upwards.
- In a single record window, will display the previous occurrence.

Down

- In a multiple row list, will move one row of data downwards.
- In a single record window, will display the next occurrence.



Page Down

- In a multiple row list, will move one window of data downwards.
- In a single record window, will display the next occurrence.



End

- In a multiple row list, will move to the end of the list.
- In a single record window, will display the last occurrence.



Run Windows Shortcut Menu

• Give the option to access Windows Calculator, Notepad and Microsoft Write







1.4 INACTIVE SCREENS

There may be times when you attempt to type and nothing is happening. You may be attempting to access a screen that is not you "**Active Screen**". On the Title Bar on the underlying screen, notice that it says (**Inactive**). Screens become "tiled" as you go to prevent you from working on the underlying screen. Notice also, there are no button bar options on an Inactive Screen as another visual that you are on the wrong screen.

To return to the active screen, press the Space Bar.

| | Iorthwind Hotel | | |
|----------------|---|----------|------------------|
| (| | | |
| Make/E | dit Bookings [nwind] - Minerals Hotel (Inactive) | | |
| File Recor | a window Diary Help | | |
| Booking Di | arv [mwind] - Minerals Hotel | | |
| File Record Fi | fit Window View Event Form Help | | |
| | | | |
| | | | |
| | | | |
| Start Date | Client | Booking# | Description |
| 04/05/2007 | Precise Bearings | 4221 | Training Program |
| 06/01/2007 | Northwind Consulting | 4230 | Growth Seminar |
| 06/16/2007 | Psychiatric Update | 1415 | Booking |
| 07/06/2007 | Northwind Consulting | 4231 | Growth Seminar |
| 08/15/2007 | Grand Prix Masters Association | 4224 | Annual Retreat |
| 09/10/2007 | Northwind Consulting | 4239 | Conference |
| 09/27/2007 | Maestro Pharmaceuticals | 4195 | Group Meeting |
| 10/25/2007 | Maestro Pharmaceuticals | 4229 | Group Meeting |
| 01/02/2008 | Northwind Consulting | 4237 | Conference |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |





1.5 Mail/Reports

An important part of your day will be checking your mail and following up on pertinent client and booking needs. This is where all Message Codes and Traces (Booking, Client and Contact) will appear. Notice that there is a mail indicator on the right hand field below the Look Up Button Bar:



To view your messages, select the *File* | *Mail* | *Reports*. The following pop-up screen will appear:





Choose MESSAGING, and the following screen will prompt.

| 🚖 Received Messages [nwind] - Minerals Hotel | | | | | | | | |
|---|-------------------------|-----------------------------|------------|--------------|--|--|--|--|
| File Record Window | File Record Window Help | | | | | | | |
| | | | | | | | | |
| DateCrtd | Clerk | Subject | Date Read | Message Code | | | | |
| 03/27/2007 | NWIND | CALL CLIENT | 04/11/2007 | | | | | |
| 03/30/2007 | MARK | F&B CHANGE: 4238 04/01/2007 | | | | | | |
| 04/10/2007 | NWIND | F&B CHANGE: 4221 04/09/2007 | | | | | | |
| 04/10/2007 | NWIND | F&B CHANGE: 4221 04/09/2007 | | | | | | |
| 04/10/2007 | NWIND | F&B CHANGE: 4221 04/09/2007 | | | | | | |
| 04/11/2007 | NWIND | | | | | | | |
| 04/11/2007 | NWIND | CALL NWIND GROUP FOR MENUS | | CALL | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

- To enter into the message to see the detail, hit enter on the highlighted line, or go up to *Window* | *Details*.
- To delete a message, put your curser on the line to Delete and choose F7. This message will be moved to the "Deleted Messages" File

| File Record Window Help Oate Created 04/11/2007 02:15pm CLERK MESSAGE From Clerk NWIND Clerk/Group NWIND To Clerk/Group NWIND Clerk Notestage Constant of the state | 🚖 Mail/Trace Message [mwind] - Minerals Hotel 📃 🗗 🔀 | | | | | | | |
|--|--|---|--------------------|-----------------|--|--|--|--|
| Promotion Clerk Message Date Created 04/11/2007 02:15pm From Clerk NWIND To Clerk/Group NWIND To Program Image: Code Message Code CALL Trace Code Image: Code Subject Call Nwind Group For Menus Keep After Send Effective 04/11/2007 02:15pm Confidential N Expiry 04/11/2007 02:15pm Line Message 10 Menus to be sent to Chef no later than Friday. 20 Guarantee numbers to be confirmed 30 Image: Code | ile Record Window Help | | | | | | | |
| Date Created 04/11/2007 02:15pm CLERK MESSAGE From Clerk NWIND | ?\\\ H +(| $? \mathbf{Y} \mathbf{Y} \mathbf{Y} \mathbf{Y} \mathbf{Y} \mathbf{Y} \mathbf{Y} \mathbf{Y}$ | | | | | | |
| Date Created 04/11/2007 02:15pm CLERK MESSAGE From Clerk NWIND Image: Color of the second of the sec | | | | | | | | |
| From Clerk NWIND To Clerk/Group NWIND To Program | Date Created | 04/11/2007 | 02:15pm | CLERK MESSAGE | | | | |
| To Clerk/Group NWIND To Program CALL Message Code CALL Trace Code Subject Call Nwind Group For Menus Keep After Send N Effective 04/11/2007 02:15pm Confidential N Expiry 04/11/2007 02:15pm Done N Line Message 10 Menus to be sent to Chef no later than Friday. 20 Guarantee numbers to be confirmed 30 | From Clerk | NWIND | | | | | | |
| To Program Message Code CALL Trace Code | To Clerk/Group | NWIND | | | | | | |
| Message Code CALL Trace Code | To Program | | | | | | | |
| Message Code CALL Trace Code | | | | | | | | |
| Trace Code Subject Call Nwind Group For Menus Keep After Send N Effective 04/11/2007 02:15pm Confidential N Expiry 04/11/2007 02:15pm Done N Line Message 10 Menus to be sent to Chef no later than Friday. 20 Guarantee numbers to be confirmed 30 | Message Code | CALL | | | | | | |
| Subject Call Nwind Group For Menus Keep After Send N Effective 04/11/2007 02:15pm Confidential N Expiry 04/11/2007 02:15pm Done N Line Message 10 Menus to be sent to Chef no later than Friday. 20 Guarantee numbers to be confirmed 30 | Trace Code | | | | | | | |
| Effective 04/11/2007 02:15pm Confidential N Expiry 04/11/2007 02:15pm Done N Line Message 10 Menus to be sent to Chef no later than Friday. 20 Guarantee numbers to be confirmed 30 | Subject | Call Nwind Group For Menus | | Keep After Send | | | | |
| Expiry 04/11/2007 02:15pm Done N Line Message 10 Menus to be sent to Chef no later than Friday. 20 Guarantee numbers to be confirmed 30 | Effective | 04/11/2007 | 02:15pm | Confidential N | | | | |
| Line Message 10 Menus to be sent to Chef no later than Friday. 20 Guarantee numbers to be confirmed 30 | Expiry | 04/11/2007 | 02:15pm | Done N | | | | |
| Line Message 10 Menus to be sent to Chef no later than Friday. 20 Guarantee numbers to be confirmed 30 | | | | | | | | |
| 10 Menus to be sent to Chef no later than Friday. 20 Guarantee numbers to be confirmed 30 | Line Message | | | | | | | |
| 20 Guarantee numbers to be confirmed 30 | 10 Menus to be s | sent to Chef no | later than Friday. | | | | | |
| 30 | 20 Guarantee nu | mbers to be co | nfirmed | | | | | |
| | 30 | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

When you have performed the task that the message is asking for, be sure you mark it as DONE (change the N to a Y). Once you have made the change to Y, you will be given the opportunity to delete this message. Simply deleting a message after you read it does not assume that you have done the task at hand. Whether or not this task has been completed will show up on a Trace Report.





CREATE AND SEND A NEW MESSAGE

Choose Messaging, choose F6 (create) Window New Message

REROUTE A MESSAGE

You receive mail that does not particularly pertain to you for the moment, or you are going to be leaving the office early and need someone else to complete the task for you. You can simply reroute the message. **To reroute the message:**

- 1) Double click on the highlighted line to enter in the message, or go up to *Window* | *Details*
- 2) When in the message, go up to *Window* | *Reroute Message*
- 3) Enter in the "New Clerk" the message is now to go to and if you want to keep a copy.

| 🌲 Mail/Trace Message [nwind] - Minerals Hotel | | | | | |
|--|--|-------------------|--|--|--|
| File Record Window Help | | | | | |
| Toggle Done Reroute Message | | | | | |
| Message Distributi | on List | | | | |
| Date Created | 04/11/2007 02:15pm | CLERK MESSAGE | | | |
| From Clerk | NWIND | | | | |
| To Clerk/Group | NWIND | | | | |
| To Program | | | | | |
| | | | | | |
| Message Code | CALL | | | | |
| Trace Code | | | | | |
| Subject | Call Nwind Group For Menus | Keep After Send N | | | |
| Effective | 04/11/2007 02:15pm | Confidential N | | | |
| Expiry | 04/11/2007 02:15pm | Done N | | | |
| | | | | | |
| Line Message | | | | | |
| 10 Menus to be s | Menus to be sent to Chef no later than Friday. | | | | |
| 20 Guarantee nu | Guarantee numbers to be confirmed | | | | |
| 30 | | | | | |
| | | | | | |

| 🚓 Reroute Mail/Trace [nwind] - Minerals Hotel 📃 🗖 🔀 | | | | | | |
|--|----------------|--------------|--|--|--|--|
| File Record Window Help | | | | | | |
| | | | | | | |
| Date Created | 04/11/2007 | 02:15pm | | | | |
| From Clerk | NWIND | | | | | |
| Subject | Call Nwind Gro | up For Menus | | | | |
| To New Clerk Keep Original? | MARK N | | | | | |
| ОК | | Cancel | | | | |





REROUTE SCHEDULE

You are going away on vacation and need to reroute your messages to someone else.

- 1) In Received Messages, choose *Window Reroute Schedule*
- 2) Fill out the date ranges, message type and to whom the messages are to be rerouted to.

| 🚓 Reroute Schedule Inwind 🛛 - Minerals Hotel | | | | | | | | |
|--|------------|----------|---------|--|--|--|--|--|
| File Record Window Help | | | | | | | | |
| ?\\E | | | | | | | | |
| Clerk Code | | NWIND | | | | | | |
| | | | | | | | | |
| From Date | To Date | Msg Type | To Clrk | | | | | |
| 04/11/2007 | 04/18/2007 | 1 | MARK | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
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| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

1.6 Messaging Reports

Messaging Reports are excellent tools to start your day with, or as a follow-up "to do list" for the day. If a colleague is ill, their trace reports can be run also to see what needs to be done while they are away.

Recipient – This is the Clerk Code that you want to run a report for. This can be for your own use, or leave blank to see every clerk code that has traces. This is an important feature for Managers to know about.

From-To Date - The dates you want to view or print

Message Type - Look Up (F8) here to select a Message Type, or leave blank for all

Message Code - This is for use when choosing the Message Type of Clerk Message

Trace Code - Look Up (F8) here to select the Trace Code, or leave blank to see all Traces

Done – N for Not done, Y for done, leave blank to see both.'





From the above fields, you can see how quick and easy it is to view what needs to be done for one or more clerks.

| 📕 print.amailloux.txt - Notepad | | |
|--|-------|---|
| File Edit Format View Help | | |
| 04/11/2007 02:43pm GBMESS2DO Minerals Hotel Pa | age 1 | L |
| For NWIND from 04/11/2007 to 04/11/2007 | | |
| All Message/Trace Types, All Message Codes | | |
| From: Nwind Support Subject: Effective: 04/11/2007 02:04pm WED | | - |
| mail Status: Not Done | | |
| From: Nwind Support Effective: 04/11/2007 02:15pm WED Type: Please Call Status: Not Done | 1enus | - |
| Menus to be sent to Chef no later than Friday. Guarantee numbers to be confirmed | | |
| end of report | | - |
| | | |
| | | |
| | | |
| | | |
| | | ~ |
| < | | > |

1.7 Trace System

There are 3 areas to send a trace: Booking, Client and Client Contact.

Client Traces can be selected by choosing *Window* | *Client Trace*, or drilling down (F5) on Traces in the Client Entry View Screen.

| 🜲 Client Trace [nwi | ind] - Mineral | s Hotel | | | | | |
|---------------------|-----------------|---------|----------|-----------|------|------|-----|
| File Record Window | Help | | | | | | |
| | | | ▲襘棏▽ | 2 | | | |
| Client Code | | 2 | | | | | |
| Date Start | Time | Trace | To Clerk | Subject | Done | Кеер | Cnf |
| 04/11/2007 | 02:45pm | SEND | | Send Info | N | | |
| | | | | - | F | | |

- 1) Create a new trace F6 Create will auto-populate current date and time
- 2) Change date as needed Use F8 for Calendar, change time as needed. This is the date and time the trace will be sent.
- 3) F8 to select the Trace
- 4) "To Clerk" will auto-populate with your clerk name, F8 to choose clerk or group
- 5) Select appropriate person or group that the trace concerns.
- 6) Enter through and a text box will appear. This is used to elaborate further about the Trace:



SALES AND CATERING USER GUIDE



2 Clients ~ The Heart of Every Booking

Clients can be created in advance of a booking or the time a booking is taken.

Clients are automatically assigned a client code that is a sequentially assigned number. This number cannot be changed once assigned.

A client may be a **company** or a **department** or an **individual** based on their requirements. Once this has been established, it is possible to **assign contacts** for this company/department who you will be taking information from about the booking.

Each contact can have a complete address that may be different from the company/department address, allowing for an unlimited number of contacts to be created, each with their own individual mailing information.

| - Minerals Flotel | | | | | |
|--------------------|---|---|--|--|---|
| - millerats riotet | | | | | |
| | | 2 | | | |
| 32211 | | | | | |
| | Sea | arch Category | GROUP | _ | |
| CORP | | Owner Text | t 🗌 | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Northwind Canada | a | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| 60 Renfrew Dr | | | | | |
| Suite 235 | | | Zip/Postal Co | de M4A | |
| Markham | | State/Prov | ON | Country | CA |
| 905-940-1924 | Phon | e Extension | | | |
| | Fax I | Number | | | |
| | | | | | |
| www.maestropms | s.com | | | | |
| | | | | | |
| | | | | | |
| | | CorpID | | Language | |
| | 32211 CORP Northwind Canad 60 Renfrew Dr Suite 235 Markham 905-940-1924 www.maestropms | 32211 Sea CORP Northwind Canada 60 Renfrew Dr Suite 235 Markham 905-940-1924 Phon Fax I | 32211 Search Category Owner Text Owner Text Northwind Canada 60 Renfrew Dr Suite 235 Markham 905-940-1924 Phone Extension Fax Number www.maestropms.com CorpID | 32211 Search Category GROUP CORP Owner Text Image: Corpin text Northwind Canada Image: Corpin text Image: Corpin text 60 Renfrew Dr State/Prov ON Suite 235 State/Prov ON 905-940-1924 Phone Extension Image: Corpin text www.maestropms.com Image: Corpin text Image: Corpin text | 32211 Search Category Owner Text GROUP CORP Owner Text Image: Corpital Code Northwind Canada State/Prov ON 60 Renfrew Dr State/Prov ON Suite 235 State/Prov ON Markham State/Prov ON 905-940-1924 Phone Extension Fax Number Extension www.maestropms.com CorpID Language |

2.1 The Client Profile – Maestro Client Maintenance

Description Fields:

Client CodeNumeric Character, SALES & CATERING automatically assigns the
client code – this is sequential, system generated to avoid duplicates.Client TypeSelect F8, or Window | Look Up to choose a valid Client Type codes
set up from SALES & CATERING Maintenance system.CategorySelect F8, or Window | Look Up and choose Company, Group or
Individual.





Under the category of INDIVIDUAL, the following will be prompted:

| Ms/Mr/Mrs/Miss | Address title of specific client. |
|----------------|---|
| First Name | Enter the first name, otherwise leave blank. |
| Middle Name | Enter Middle Name of Client |
| Surname | Enter Surname of Client |
| Salutation | How this Client is addressed: Example Ms. Cavanaugh, Natalie or Nat |
| Title | Position title |

Under the category of GROUP OR COMPANY, the following will be prompted:

| Company Address 1 | The name of the Company |
|-------------------------------|--|
| Address 2 | First address field such as suite or unit number |
| Address 2 Zim/Destal Cade | A labor summeric abore star for mostel or vir and entry |
| Zip/Postal Code | |
| City | |
| Country Code | select <i>Window</i> <i>Look Up</i> , or press <i>F8</i> to Look Up valid country codes entered in SALES & CATERING Maintenance system. |
| State/Prov Code | Select <i>Window</i> <i>Look Up</i> , or press <i>F</i> 8, or press for lookup of valid |
| | state/province codes entered in SALES & CATERING Maintenance |
| | system. |
| Phone Number | Telephone number. Be consistent with phone number (dash or space) |
| Phone Extension | Telephone extension number if applicable |
| Fax Number | Fax number |
| Parent Company | Parent company of this client (if applicable). Use client code. |
| | Example: Client is IBM Canada and the Parent Company is IBM |
| | International. Lookup is available by selecting <i>Window</i> Look Up, or |
| | pressing $F8$ Company must exist in the Client database |
| Bill to Client | Billing client information if another company is being billed |
| Din to Chent | Company must exist in Client database. Lookun is available as well |
| A = = = = = = 4 | This is the Assessed Mercana of the Olivet De Cla (Cales Mercana) |
| Account | I his is the Account Manager of the Client Profile (Sales Manager) |
| Internet Address | Internet address if applicable www.address.com |
| Language | This is the preferred language of the Client. Blank=English. This does |
| | not change the screens to another language. |





To help build your Client Database, the following tools are at your disposal in the Client Profile. To access these tools, go up to *Window* **Client Maintenance** main screen to see the other options.

Bookings By Client

All past, present and future bookings for the Client that have been booked by any Client Contact will appear here. From here you can rebook the Client into a fresh booking, enter into an older booking to duplicate or simply view what the client had the last time they visited you.

| 🌲 sc c | lient Entry/View [| nwind] - Minerals He | otel (Inactive) | | | | | |
|---------|--------------------|-----------------------|-----------------|----------|------------|------------|----|----|
| File Re | cord Window Help | | | | | | | |
| | | | | | | | | |
| Client | Code | 27548 | NORTHWIND CO | NSULTING | 6 | | | |
| Addre | Booking By Cl | ient Code [nwind] - | Minerals Hotel | | | | | |
| Addre | | | | | 1 | | | |
| Zip/P | | | | × 🔻 💆 | | | ry | CA |
| City | Client Code | | 27540 | | | | | |
| Phon | Client Code | | 2/548 | | | | | |
| Fax N | Bookina# | Description | | | StartDte | End Date | | |
| Land | 4214 | Conference | | | 01/02/2007 | 01/04/2007 | | |
| Lang | 4223 | Design Study | | | 01/26/2007 | 01/28/2007 | | |
| Conta | 4230 | Growth Semina | r | | 06/01/2007 | 06/03/2007 | | |
| Accou | 4231 | Growth Semina | r | | 07/06/2007 | 07/08/2007 | | |
| Lead | 4237 | Conference | | | 01/02/2008 | 01/04/2008 | | |
| Date | 4239 | Conference | | | 09/10/2007 | 09/12/2007 | | |
| | | | | | | | | |
| Trace | | | | | | _ | | |

Client Text

Client text can be created to further elaborate or describe a client. This text is unlimited and easily accessible





S/C Client User Fields Entry

These User Fields are defined by the property as to what additional information they wish to track. This is any additional information you wish to capture about the client. Maestro supports 20 of these user fields in the form of 10 Alphanumeric, 5 Date, and 5 Numeric. These User Entry Fields will be seen again in Contact and Booking.

Client Trace

SALES & CATERING allows for set-up of trace files (reminders) that may be used to produce "to do" lists to help you manage your day. Traces here are apply to both the **Client and Client Contacts**.

| 🌲 Client Trace [nwi | ind] - Mineral | s Hotel | | | | |
|---------------------|-----------------|---------|----------|-------------|---------|--------|
| File Record Window | Help | | | | | |
| | | | ▲╈₽ | 7 | | |
| Client Code | | 27548 | | | | |
| | | | | | | |
| Date Start | Time | Trace | To Clerk | Subject | Done Ke | ep Cnf |
| 04/11/2007 | 04:02pm | CALL | NWIND | Call Client | NY | N |
| 04/11/2007 | 04:03pm | SEND | NWIND | Send Info | NY | N |
| 04/11/2007 | 04:03pm | SITE | NWIND | Site Visit | NY | N |
| | | | | | | |
| | | | | | | - F |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

To create a Client Trace

- 1) Create a new trace F6 Create will auto-populate current date and time
- 2) Change date as needed Use F8 for Calendar, change time as needed. This is the date and time the trace will be sent.
- 3) F8 to select the Trace
- 4) "To Clerk" will auto-populate with your clerk name, F8 to choose clerk or group
- 5) Select appropriate person or group that the trace concerns.
- 6) Enter through and text box will pop up. Add extra notes as needed
- 7) F4 to exit
- 8) "Done" The trace has not been done yet, so keep as no
- 9) "Keep" If you want to keep this trace after it is sent
- 10) "Cnf" is Confidential. The clerk receiving the trace will have to use their password to open up the trace. Traces marked "Confidential" will also not print on trace reports
- 11) The trace is sent as soon as you exit F4 out.





Tax Exemptions

This field allows the Account Manager to place a Tax Code on the Client Profile as a record that the Client is entitled to a tax exemption. This does not directly apply to the booking each time. This only applies to Tax Exemptions, not Service Charges or Discounts. In the example below, the Client is exempt from the Ontario tax of GST.

To record a Tax Exemption:

- 1) Create a new line F6
- 2) Look Up (F8) and choose the tax required.
- 3) Enter it is now in the Tax Code Field.

| 🚓 Client Tax Exe | emptions [nwind] - Minerals Hotel | |
|-------------------|------------------------------------|--|
| File Record Windo | ow Help | |
| ?\\ | | |
| Client Code | 27548 Northwind Consulting | |
| Tax Code | Reason For Evemption | |
| Tax couc | | |
| PSI | Government | |
| | | |
| | | |
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To search for a Client to work on their profile:

- 1) You must be in the Client Profile Screen (From the Main Screen: SC Client Entry View)
- 2) Do a Look Up, F8
- 3) Use the first 3 letters. If you are looking up a Client that is listed as an "Individual" Category, use their last name.
- 4) The Client Code will either appear immediately, or a selection of name will appear. If the latter, select the appropriate client and press enter.

| 🌲 Client Lookup [nwind] | Minerals Hotel |
|--------------------------|----------------|
| File Record Window Help | |
| | |
| Client Name | |
| Account Manager | |
| Contact Name | |
| | |
| (| DK Cancel |





3 Contacts

3.1 Client Contacts & Additional Contact Information

Client Contacts List and Client Contact Entry

With Company and Departmental clients, it is usually useful to have the ability to track contacts individually. The contacts component of MAESTRO SALES & CATERING allows for each client to have an unlimited list of contacts that can be associated. Personal contact information, such email address and telephone number, can be collected for each contact.

To create a new Client Contact

- 1) In the SC Cleint Entry View, select Window Client Contacts
- 2) Create (F6) and the Client Contact Entry Screen will appear
- 3) Fill out details as required see following page

| 🌲 Client Contact List [nwind] - Minerals Hotel | | | | | | | | |
|---|-------------------------|--------------|-----|------------|--|--|--|--|
| Eile <u>R</u> ecord <u>Window H</u> elp | Elle Record Window Help | | | | | | | |
| | | | | | | | | |
| Client Code 27548 S | С | | | | | | | |
| Contact Name | ID | Phone Number | Ext | Fax Number | | | | |
| Bob Barker | 2 | 905-555-5555 | | | | | | |
| Stephen Smith | 1 | 905-555-5555 | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |



NORTHWIND

| 🚓 Client Contact Entry [mv | rind] - Minerals Hotel | |
|--|----------------------------|--|
| <u>File R</u> ecord <u>W</u> indow Reports | Help | |
| | | |
| Client Code | 27548 Northwind Consulting | |
| Source Module | | |
| Line Number | 3 | |
| 10 11 10 10 10 10 10 10 10 10 10 10 10 1 | | |
| Personal Title | Mr | |
| First Name | Mark | |
| Last Name | Kelly | |
| Contact Name | Mark Kelly | |
| Salutation | Mr. Kelly | |
| litle | | |
| Address 1 | | |
| Address 2 | | |
| Zip/Postal Code | LGR UEI | |
| City Ctate Oraci Cada | Markham Chi | |
| State/Prov Code | | |
| Courtry Coue Dhana Number | | |
| Phone Number Rhope Extension | 900-300-3000 | |
| Home Phone | | |
| Coll# | | |
| Eav Number | | |
| Date Of Birth | | |
| Internet Address | | |
| Email Address | mark@maestronms.com | |
| Alternate Email | | |
| Email Opt Out | N | |

Salutation – This is how you refer to the contact.

Address- You will receive a prompt to copy over the address of the company that the contact represents Internet Address - Can be changed to the email address of the individual contact.

Before leaving the Client Contact Entry, Client Contact User Fields can be added that are specific to your needs.





Bookings By Client Contact

This can be accessed by highlight the client in the Client Contact List Screen, and selecting *Window Bookings by Client Contact Name*. This field allows the user to view all past, present and future bookings for the Client Contact.

Client Contact is unique to the Client they are assigned to. If they are contacts for more than on e client, they do not need to be recreated

| 🌲 Booking By Cl | ient Contact Name [m | vind] - Minerals Hotel | | | | | | | | | |
|----------------------------------|---|-------------------------|------------|------------|--|--|--|--|--|--|--|
| <u>File R</u> ecord <u>W</u> ind | <u>File R</u> ecord <u>W</u> indow <u>H</u> elp | | | | | | | | | | |
| | | | | | | | | | | | |
| Client Code 27548 | | | | | | | | | | | |
| Contact Nan | ne | Stephen Smith | | | | | | | | | |
| | | | | | | | | | | | |
| Booking# | Description | | StartDte | End Date | | | | | | | |
| 4214 | Conference | | 01/02/2007 | 01/04/2007 | | | | | | | |
| 4230 | Growth Semina | r | 06/01/2007 | 06/03/2007 | | | | | | | |
| 4231 | Growth Semina | r | 07/06/2007 | 07/08/2007 | | | | | | | |
| 4237 | Conference | | 01/02/2008 | 01/04/2008 | | | | | | | |
| 4239 | Conference | | 09/10/2007 | 09/12/2007 | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

Contact Trace

These traces are created by selecting *Window* | *Contact Trace* within the Client Contact Entry Screen These are similar traces as previously mentioned, and creation follows the same format.

| 🌲 Client Trace [mwi | ind] - Mineral | s Hotel | | | | | | | |
|-----------------------------------|-----------------|----------|----------|---|--------------|--|------|------|-----|
| <u>File R</u> ecord <u>Window</u> | Help | | | | | | | | |
| | | 002 | ▲┲┛ | | | | | | |
| Client Code | | 27548 | | | | | | | |
| Contact Name | Step | hen Smit | n | | | | | | |
| ID | | 1 | | | | | | | |
| | | | | | | | | | |
| Date Start | Time | Trace | To Clerk | | Subject | | Done | Кеер | Cnf |
| 03/30/2007 | 11:00am | CALL | MARK | П | Call Client | | Y | Y | Ν |
| 04/03/2007 | 11:00am | SITE | LORI | + | Site Visit | | N | Y | N |
| 03/31/2007 | 10:16am | NTF | MARK | П | Note to File | | Y | Y | N |
| | | | | П | | | | | |
| | | | | П | | | | | |
| | | | | П | | | | | |
| | | | | П | | | | | |
| | | | | Г | | | | | |
| | | | | Г | | | | | |
| | | | | Π | | | | | |
| | | | | | | | | | |





4 The Booking Process ~ Producing the Contract

There are 6 ways to enter into a NEW Booking:

| 1) Client | SC Client Entry | Window | Bookings by Client – Create New Booking |
|------------|--------------------|-------------|---|
| 2) Client | SC Client Entry | winaow | Client Contacts window Bookings by Client window Create |
| New Book | ing | | |
| 3) Booking | g Make Edit Boo | oking - New | v Booking |
| 4) Booking | g Make Edit Boo | oking – Ava | ailability – Choose View – Book Room – Create Booking once exit |
| 5) Booking | g Make Edit Boo | oking – Sea | rch (reveals Booking Diary) – Edit – Create New Booking |
| 6) Duplica | ting an existing H | Booking. – | (within Booking) Window Duplicate Booking |
| | | | |

How you enter into a new Booking will depend on your Sales Process as a property and how you conduct business. By capturing the information from the contact, entering in a new booking, and then checking availability, this will **allow you to capture a turn-away reason** in the case of no availability.

| 🚓 Make/Edit Bookings [nwind] | - Minerals Hotel | | | |
|--------------------------------------|------------------|--------------|----------|-------------|
| <u>File Record Window Diary Help</u> | | | | |
| | | | | |
| | | | | - |
| Search For Booking By: | | Include Past | Bookings | |
| | | | | |
| LastName/Company | ļ | | | |
| Contact Name | | | | |
| From Date | To Date | | Status | All |
| Description | | | | Quote |
| Booking Number | | | | X Tentative |
| Client Code | | | | X Confirmed |
| Account Manager | | | | Cancelled |
| Conf Serv Mgr | | | | Posted |
| - | | | | - |
| | | | | |
| | | | | |
| Search | New Booking | Availabilit | у | Exit |



4.1 Booking Screen Fields

| 🌲 Booking [nwind] | - Minerals Hotel | | | | | | | | | | | | | |
|------------------------|------------------|-----------------------------------|---------|-----------|------|------|-----|--------|-------|-------|--------|---------|-----|----|
| File Record Edit Windo | w View Event For | rm Reports <u>A</u> udit <u>F</u> | telp | | | | | | | | | | | |
| | | | | ' 🐳 🥭 | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Booking# | 4231 | Status | TN | TENTATIVE | | | (| Own | er Pr | ор | QL | | | _ |
| Acct Managr | MARK | Text N | Conf S | Serv Mgr | | MAR | < | | | | Bookii | ng Text | | Ν |
| Client | 27548 | Northwind C | onsulti | ng | | | | | | | | Te | ext | Y |
| Bill To | 27548 | | | | _ | | | | | | | | | |
| Description | Growth Sem | ninar | | | _ | | Roo | om N | light | 5 | | | | |
| Contact | Stephen Sm | hith | | | _ | | Auc | lit St | tatus | | | | | |
| Onsite Cntct | | | | | _ | | Dec | cisior | n Dat | e | 03/14 | /2007 | _ | |
| Folio/Event | N | Mkt Segme | nt | COR | | | Cor | ntrac | t Du | e | 03/14 | /2007 | | |
| Bill Terms | SPECIAL | Billing Text | | N | | | Res | s Me | thod | | | | | |
| Srce of Bus | REPEAT | | | | | | | | | | | | | |
| | Date | Time | Day | | | | | Exp | pecte | d | Gua | ranteed | | |
| Start | 07/06/2007 | 09:00am | FRI | | Adu | ilts | | | 40 | 0 | | 40 | | |
| End | 07/08/2007 | 05:00pm | SUN | | Chi | dren | | | | | | | | |
| Waitlist Rm | N | | | | | | | | | | | | | |
| Event Date | | | | | Evt# | FB | In | Sp | Rm | Event | Total | | | Ad |
| 07/06/2007 | Growth Semii | nar | | | 1 | | L | | 2 | | | 636. | 00 | |
| 07/07/2007 | Growth Semii | nar | | | 2 | | | | 2 | | | 636. | 00 | |
| 07/08/2007 | Growth Semii | nar | | | 3 | | L | | 2 | | | 636. | 00 | |
| | | | | | | | | | | | | | | |
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Booking Number

This is a Maestro auto-generated number unique to the Booking. This number cannot be changed or manipulated in any way.

Status

This is the Status of the Booking. Two alpha character code that represents the booking status. Select $Window \mid Look \ Up$ or press F8 to see valid status codes.

Tentative - Quote - Confirmed - Posted - Cancelled

Account Manager

This is the person (Clerk Code) that originally made the booking, or the Manager responsible for the account. F8 Look up to choose in the case of no auto-populate.

Text

This field, next to the Account Manager, allows for notes for the user regarding the booking.

Conference Service Manager

Person or staff member responsible for function





Booking Text

Text that is specific to this booking. Can be accessed by drilling down (F5) on the field, or by choosing Window | Booking Text

Client

This is the Client Code that was created in the Client Profile. If this is a new Client, you may Create (F6) here to enter into a new Client Profile. To look up a Client that already exists, you may do a Look Up (F8).

Text

Located next to the client name, is any text that was noted during the client creation. It will copy, and pertain to this client. You may add additional information at this point, but it will apply to the client for all bookings hereafter.

Bill to

This is also a Client Code. This is where the bill will be allocated to in Accounts Receivable.

Billing Text

Text that applies to the billing process. Can be accessed by drilling down (F5) or from *Window Billing* text.

Description

This is the Booking Description. F8 Look up to choose a generic term, or type within the field what the name of the specific booking should read.

Contact

This is the Client Contact that originally requested the booking. However, it may be necessary on occasion to assign multiple contacts to a booking. There is an additional contact field under *Window* | *Contacts*.

Folio/Event

This is where you will set up the type of Folio for your Booking. There are 3 options here:

- N= One folio for the entire booking. You will still be able to post each day's event when completed.
- Y= One folio for each Event. This would apply in the example of a booking that has a meeting once a month for a year, allowing the Conference/Catering Manager to post the meeting's charges when finished to start collecting payment, while still keeping the booking open.
- **G=** Post to the Group Master. A Group Bedroom Reservation must be set up first and attached (*View Group Bedroom Reservation*)

Market Segment

This is the Market Segment Group that was determined in Maintenance. A detailed report tracks this information in *Reports Management Reports | Market Segment Analysis*.

Start Date/Start Time

Enter the First Event Day and Time according to the client. There is a F8 Look Up feature in any date field that will give you a calendar.

End Date/End Time

Enter the Last Event Day and Time according to the client. There is a F8 Look Up feature in any date field that will give you a calendar.





Decision Date & Contract Due

Will auto populate based on the specifics you have outlined in maintenance. This may be over keyed to adjust dates.

Expected Adults Number of expected adults in the booking

Expected Children Number of expected children in the booking

Guaranteed Adults

Number of guaranteed adults. This number will auto-populate through the events.

Guaranteed Children

Number of guaranteed children.

Audit Status

Indicates if the audit has been started, done or posted for this booking. System generated when audit is started.

4.2 "EDIT" (Drop Down Menu within Booking)

Move Booking to New Date

You can move the entire booking and all contents to a new date. (Recommend checking availability first)

Create New Client

Can be selected from the *Edit* | *Create new Client* menu, or simply press F6 to Create with your curser on the Client in the Booking Screen

Edit Booking Client

Allows you to edit the Client Profile

Edit Booking Client Text

The text that was set up in Client Profile is accessible via the booking instead of having to go back into the Client Profile. This is also where you can read the Client Text.

Edit Billing Client Allows you to edit the "Bill to" Client

Edit Billing Client Text

Currently this is the same text field as the Edit Booking Client Text

De-assign Group Reservation

De-assigns the Group Reservation, should you link the wrong block to the wrong booking.





4.3 "WINDOW" (Drop Down Menu within Booking)

Advance Deposits

Advance deposit requests can be made and are tracked by the booking. Each advance deposit request specifies a due date, amount due and requesting clerk. Deposit receipts are applied directly to the booking folio.

Booking Cancellation

You may cancel a booking by changing the status to Cancelled (F8 to lookup cancel code), or by choosing this option. A prompt to ask the reason for the Cancellation will appear. A list of pre-determined cancel codes will be available to give the reason. Cancellations can be viewed in *Reports* | *Management Reports* and selecting Lost Business Reports.

Booking Cancellation Text

Booking Cancellation Text allows you to further elaborate on the Cancel Code as to why the Booking was cancelled. A listing of all released function rooms and the rates associated with them will be populated here when a booking is cancelled.

Booking User Fields Entry

Booking User Fields Entry are User Defined Fields set up in Maintenance. These User Fields are pick lists that are created for the Account Manager to define certain aspects of the Booking.

Booking Text

Booking Text is used for the contract and will pull also onto the invoice.

Account Manager Text

Account Manager Text is used to place any pertinent notes regarding the booking from the Sales Manager to other Staff that will be dealing with the booking.

Staff Services

Staff Services may be used to track hours spent on certain aspects of the booking. Duty Codes and Responsibility Codes must be previously set up in Maintenance.

Guest Bedrooms

Guest Bedrooms is not the Group Block, or anything pertaining to the Group Reservations at your property. It can be used to track delegates that are staying at another property – this is for information only.

Tax Exemptions

As noted in the Client Profile, certain clients may be eligible for a Tax Exemption. This is unique to each booking and will have to be entered each time.

Discounts/Service Charges

These charges have to pre-exist in Global Maintenance. If a Client is eligible for a discount or a unique service charge, it is to be placed here.

Booked Function Rooms

Referral for booked rooms at any time during the booking process. This field shows all Function Rooms booked, dates, times, rate and whether or not the room is waitlisted.





Example

| 🌲 Booked Functi | ion Room | s [nwind | - Minerals Ho | tel | | | | | | | | |
|-----------------------------------|---|----------|----------------|------------|---------|---------|--------|--------|----|---|------|--|
| <u>File R</u> ecord <u>W</u> indo | jile <u>R</u> ecord <u>Wi</u> ndow <u>H</u> elp | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Booking Number | | 423 | 7 Conference | | | Booking | Status | TN | | | | |
| Client Code | | 2754 | B Northwind Co | onsulting | | | | | _ | | | |
| | | | | | | | | | | | | |
| Start Date Time | | Bld | Room | End Date | Time | Usage | Rate | 4 | ١P | W | Evnt | |
| 01/02/2008 | 07:00pr | n QL | SHAW CAFE | 01/02/2008 | 11:00pm | 4 | | 276.00 | | Ν | 1 | |
| 01/03/2008 | 09:00ar | n QL | IMPERIAL A | 01/03/2008 | 05:00pm | 8 | | 280.00 | | N | 2 | |
| 01/03/2008 | 09:00ar | n QL | LOYALIST | 01/03/2008 | 05:00pm | 8 | | 120.00 | - | N | 2 | |
| 01/03/2008 | 06:00pr | n QL | TIARA | 01/03/2008 | 09:00pm | 3 | | | | N | 4 | |
| 01/04/2008 | 09:00ar | n QL | IMPERIAL A | 01/04/2008 | 05:00pm | 8 | | 280.00 | | N | 3 | |
| 01/04/2008 | 09:00ar | n QL | LOYALIST | 01/04/2008 | 05:00pm | 8 | | 120.00 | - | N | 3 | |
| | | | | | | | | | - | Г | | |
| | | | | | | 1 | | | - | Γ | | |
| | | | | | | | | | - | Г | | |
| | | | | | | | | | - | Γ | | |

Booking Trace

These traces are normally set-up in Maintenance to auto-generate the first time the booking is exited. These traces also provide reminders to follow up on such things as receiving of the signed contract, deposit, and rooming list.

Duplicate Booking

Duplicating provides a method in which to copy a booking. When duplicating a booking for the future that has several events occurring on multiple days, the new duplicated booking will create the several events with the **same relative starting day as the original booking**. Be sure to check your availability first, or rooms may be waitlisted. This is discussed further in "Changes to a booking".

4.4 "EVENT" (Drop Down Menu within booking)

All Sub-events

This will show all sub-events' Function and Set-up. Very useful for Sales Managers to assign Functions and Set-ups to the located Function Rooms in order to produce the contract.

Example

| D. | | | | | | | | | |
|-----------|--------------------------------|----------------|-------|---------|-----|------------|------|--------------|-----------|
| 🚓 All Su | bEvents [nwind] - N | Ainerals Hotel | | | | | | | |
| Eile Reco | rd <u>W</u> indow <u>H</u> elp | | | | | | | | |
| ?\ | | 004 | | | - | | | | |
| Bookin | g Number | 4237 | Confe | erence | | | Bo | oking Status | TN |
| Client | Code | | | | | | | | |
| | | | | | | | | | |
| Ev# | EvntDate | Start | Sub# | End | Bld | Room | Gtd# | Function | Set Up |
| 1 | 01/02/2008 | 07:00pm | 1 | 11:00pm | QL | SHAW CAFE | 21 | RECEPTION | AS IS |
| 2 | 01/03/2008 | 09:00am | 1 | 05:00pm | QL | IMPERIAL A | 21 | MEETING | BOARDROOM |
| 2 | 01/03/2008 | 09:00am | 2 | 05:00pm | QL | LOYALIST | 21 | BREAKOUT | AS IS |
| 2 | 01/03/2008 | 10:00am | 3 | 10:30am | QL | IMPERIAL A | 21 | BREAK | OUTSIDE |
| 2 | 01/03/2008 | 12:00pm | 4 | 01:00pm | QL | IMPERIAL A | 21 | LUNCH | INSIDE |
| 2 | 01/04/2008 | 02:00pm | 5 | 02:30pm | QL | IMPERIAL A | 21 | BREAK | OUTSIDE |
| 3 | 01/04/2008 | 09:00am | 1 | 05:00pm | QL | IMPERIAL A | 21 | MEETING | BOARDROOM |
| 3 | 01/04/2008 | 09:00am | 2 | 05:00pm | QL | LOYALIST | 21 | BREAKOUT | AS IS |
| 3 | 01/04/2008 | 10:00am | 3 | 10:30am | QL | IMPERIAL A | 21 | BREAK | OUTSIDE |
| 3 | 01/04/2008 | 12:00pm | 4 | 01:00pm | QL | IMPERIAL A | 21 | LUNCH | INSIDE |
| | | | | | | | | | |





Create New Event

Creates a brand new Event Number. Must have curser in event field, can also F6 to create.

Edit Event Details

This also allows you to enter into the Subevent. Must have curser on the event you wish to enter, can also drill down (F5)

Event Text

Unlimited text may be entered specifying details pertinent to the specific event within the booking. Must have curser on the event the you wish to have text apply, or can choose the event and drill down (F5) on Event Text.

Delivery Location

Similar to text, however, delivery location text is intended for use when off premises catering is being provided and a delivery address or special instructions are required.

Activity List

Actions that must be completed for the event. This may include such items as setup and teardown of the room.

Event Forms

Not applicable

Duplicate Event

Duplicates the event within the booking. Must have curser on the event you wish to duplicate. This is a great feature for weekly meetings under one grand booking.

List Delegates for Event

Not applicable

Event Delegate Rates

Not applicable

4.5 "VIEW" (Drop Down Menu within booking)

Booking Availability

Enter here anytime to look at Function Room and Guest Room (when integrated with Maestro PMS)

Group Bedroom Reservation

This will create or view a Group Bedroom Reservation. This is only applicable when integrated with Maestro PMS. You will be prompted with the option to create a group reservation, or lookup if the rooms have already been allocated through the front desk.

4.6 Checking for Function Room Availability

Checking Availability from the Booking:

1) Go up to *View* Booking Availability on the menu bar





- 2) Fill out appropriate fields on the Availability Selections Screen. As a Sales Manager, you will want to see the big picture and therefore will want to leave a few fields empty. If a client is being very specific and is in a hurry, filling out as many fields as possible will help narrow down the criteria quickly.
- 3) Choose which path to check for Availability (Single Day, Two Week and Month View)

No matter how you enter the booking, checking availability will always start with this screen Note: By selecting a single day (Monday) it will show all availability screens with only Mondays listed.



| Start Date- | This has been automatically populated from the Booking. |
|------------------------|---|
| End Date – | This has been automatically populated from the Booking. |
| Building – | If the property has function space in different buildings, either leave the field |
| - | blank, or do a Look Up (F8) for a specific building. |
| Function – | These are all the possible functions, recommend leaving this blank. |
| Low Capacity - | This is the minimum number of people to see rooms displayed for. |
| High Capacity - | This is the maximum number of people to see rooms displayed for. |
| Start Time – | This will be the default that has been set for all rooms and will auto-populate, change |
| | required, or leave to see the entire day. |
| End Time – | same as above. |
| Consecutive Hou | urs – Can use this when narrowing down for Day View. |

Bedrooms Needed – The number of bedrooms required.

The Days of the Week – Use these if, for example, your Client Contact would like to hold a consecutive meeting on every Monday for the month, or to establish booking patterns.

4.7 Booking Function Space

There are three ways to book function space for a Booking.

- 1) Booking *Make Edit Booking* Availability
- 2) Creating a new booking first, completing the booking screen fields. Select *View* | *Booking Availability*
- 3) Adding additional Function Space for a booking from the booking screen. *Window* | *Booked Function Rooms* | *Window* | *Book a Function Room*

as





General Availability:

- 1) Sales and Catering Menu (with the Giraffe) screen
- 2) Booking
- 3) Make/Edit Bookings
- 4) Availability
- 5) Choose which path; Single Day, Two Week and Month View

4.8 Day View

The Day view presents an availability table showing function room names down the left side of the window and hourly time segments across the top. Each position on the screen represents a one hour time usage. Any bookings that are current for the selected day, with show in a time line form, and will state the name of the group. The color of the booking will represent the status (Tentative, Confirmed)

| 🚖 Sin | gle I | Day Function Roo | om Av | ailabil | ity [nw | ind] | - Mine | rals | | | | | | | | | | | | | | |
|---|----------------------|-------------------------------|-------|---------|---------|-------|--------|------|---|---|---|---|---|---|-------|--------|------|--------|-------|----|----|--------|
| Eile B | ecord | <u>i W</u> indow <u>H</u> elp | | | | | | | | | | | | | | | | | | | | |
| Availab Function Set Up Attend | oility on lees | | 01/0 | 2/2008 | 512 | | | | | | | | | | New | Select | ion | | | | | |
| Bedroo | oms | 148 | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| Die | | Deem | AM | | | 1.0 | | PM | 4 | - | - | | 2 | ~ | - | | | 1.0 | | AM | ្ន | - |
| BIU | | R00m | 1 | • | 9 | 10 | 11 | 12 | 1 | 2 | 3 | 4 | 9 | 0 | 1 | • | 9 | 10 | 11 | 12 | 1 | 2 |
| | - 6 | 0102 | | | | | | | | | | | | | | | | | | | | |
| | - 6 | SHAW CAFE | | | | | | | | | | | | | - Nor | t hwi | nd C | onsu | 1 + - | | | |
| OL. | - 6 | ATRIUM | | | | | | | | | | | | | | | | 0110.0 | | | | |
| OL. | - 6 | GEORGIAN B | | | | | | | | | | | | | | | | | | | | _ |
| QL | - (| GEORGIAN C | | | | | | | | | | | | | | | | | | | | |
| QL | | GEORGIANAB | | | | | | | | | | | | | | | | | | | | |
| QL | | GEORGIANBC | | | | | | | | | | | | | | | | | | | | _ |
| QL | 1 | IMPFOY | | | | | | | | | | | | | | | | | | | | _ |
| QL | | IMPERIAL | | | | | | | | | | | | | | | | | | | | |
| QL | | IMPERIAL A | | | | | | | | | | | | | | | | | | | | |
| QL | _ 1 | IMPERIAL B | | | | | | | | | | | | | | | | | | | | |
| QL | _ | TRILLIUM | | | | | | | | | | | | | | | | | | | | |
| QL | | MAGNOLIA | | | | | | | | | | | | | | | | | | | | |
| QL | | SCARLET | | | | | | | | | | | | | | | | | | | | |
| QL | _ 1 | IVORY | | | | | | | | | | | | | | | | | | | | |
| QL | _ ! | LOYALIST | | | | | | | | | | | | | | | | | | | | |
| QL | _ | BALMORAL | | | | | | | | | | | | | | | | | | | | |
| QL | - 8 | SOMMERSET | | | | | | | | | | | | | | | | | | | | |
| QL | — B | WINDSOR | | | | | | | | | | | | | | | | | | | | |
| QL | - 8 | CARLISE | | | | | | | | | | | | | | | | | | | | |
| | - | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| NL | | LIMIN M | | | | | | | | | | | | | | | | | | | | |
| | | << | | | | | | | | | | | | | | | | | > | > | | Legend |

- Place your cursor to the Function room and start time or start date you wish to book, and hit Enter.
- You are now on a screen called Function Room Booking.



NORTHWIND

| 🌲 Function Room Booking [| nwind] - Minerals Hote | el | | | |
|---------------------------|-------------------------|------------|----------|----------------|----|
| Eile Record Window Help | | | | | |
| | | | 2 | | |
| Booking Number | 4240 | | | Booking Status | QT |
| Client Code | | | | - | |
| Building Room | QL GEORGIAN C | | | | |
| Start Date | h4/12/2007 | Start Time | 08:30am | | |
| End Date | 04/12/2007 | End Time | 11:50pm | | |
| | 04/12/2007 | Lita Time | TT: 39pm | | |
| Event Number | | | | | |
| Do Not Post | | | | | |
| Lleage Hours | | | | | |
| Price | | | | | |
| | ОК | Cancel | | | |

- The building and room chosen have auto-populated. Ensure you have the correct start and end date and times. Enter through the Event Number.
- You will see that the Function Room and times (day) you require are now display "New Booking".
- You may choose additional rooms at this point, but as soon as you exit (F4) you will enter the booking screen.
- Proceed with the booking as outlined in "The Booking Process"

4.9 GRC Availability (Group Rooms Control)

This availability screen is an 8 day range of all function rooms, and available bedrooms (if integrated with front desk).

Function rooms are located on the left side of the chart, with available bedrooms listed along the to. Segments for the day are allocated by property based on time ranges for:

| M = Morning | |
|----------------------|--|
| A = Afternoon | |
| E = Evening | |
| Available | - a character representing an available time (usually "_") |
| Confirmed | - represents a confirmed booking (usually "C") |
| Tentative | - represents a tentative booking (usually "T") |
| Quote | - represents a booking that has been quoted a price (usually "P") |
| Confirmed/Waitlisted | - indicates a confirmed booking with a waitlisted room (usually"!") |
| Tentative/Waitlisted | - indicates a tentative booking with a waitlisted room (usually "?") |
| Non-applicable day | - indicates an unselected or non applicable day (usually "*") |
| | |

By selecting Availability in the top right, the Day view will appear for the day that your curser is placed.



NORTHWIND

| 🚓 GRC/Function Room Ava | ilability [nwind | - Minerals Hotel | | | |
|---|------------------|------------------|------------|------------------|------------------|
| <u>File R</u> ecord <u>W</u> indow R <u>e</u> serve | Help | | | | |
| | | | ▼ ₹ 🚈 | | Availability |
| Date 04/12/2007 | ыч | | | - | Availability |
| | THU FRI 12 1 | 5AT 3 14 | SUN 15 | MON TUE 16 17 | WED THU 18 19 |
| Directives | <u>84 84</u> | <u> </u> | 3 4 | <u>34 34</u> | |
| Guest Rms Avail | 80 | 94 108 | 126 | 131 133 | 133 134 |
| Grp Rms Confirm | 8 | 8 8 | 8 | 8 8 | 8 / |
| Grp Rms Tentaty | | | | | |
| Coll Bata | | | | | |
| Bld Boom | | | | | MAEMAE |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| OL GEORGIAN B | | | | | |
| OL GEORGIAN C | | | | | |
| QL GEORGIANAB | | | | | |
| QL GEORGIANBC | | T | | | |
| QL IMPFOY | | | | | |
| QL IMPERIAL P | P P | | | | |
| QL IMPERIAL A P | PP [| | | | |
| QL IMPERIAL B P | РР ГГ | | | | |
| | | | | | |
| | 4240 Kelly | | | | , L + |
| | << | APRIL >> | > << | 2007 >> | >> |

By placing your curser on the booking, the name of the group and their client number will populate at the bottom of the screen

The same process as the Day View applies when making a booking. Place your curser on the date and time period and hit Enter. If you need the room for the entire day, change the default time in the Function Room Booking Screen, and the entire day will block. Once you exit (F4) you will enter the booking screen

4.10 One Month View

Month View is the best choice overall for seeing the "big picture" and dealing with a larger capacity of Function room blocks. Month View allows you to book several different function rooms at a time. The one month availability presents an availability grid showing function room names down the left side of the window and up to 31 days across the top.

Each position on the screen represents a full day usage, and will display a character indicative of the availability of the room (see characters above).


| 😓 One Month Function Room Availability [nwind] - Minerals H | | | | | | |
|--|--|--|--|--|--|--|
| Elle Record Lookup Window Mark Help | | | | | | |
| | | | | | | |
| Start Date 04/12/2007 07:00am New Selection | | | | | | |
| End Date 11:59pm | | | | | | |
| | | | | | | |
| 4240 Kelly | | | | | | |
| | | | | | | |
| Bedrooms 108 for APRIL 14 SATURDAY | | | | | | |
| 1 1 1 1 1 1 1 1 1 2 2 2 2 2 2 2 2 2 2 3 | | | | | | |
| Bld Room 123456789012345678901234567890 | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| 11 QL GEORGIAN B T T F F F F F F F F F F F F F F F F F | | | | | | |
| | | | | | | |
| 15 QL GEORGIANAB T T F F F F F F F F F F F F F F F F F | | | | | | |
| 17 QL GEORGIANBC TTCCCCCCCC | | | | | | |
| | | | | | | |
| 21 QL IMPERIAL GGCCCCCCPPPPPCCCCCCCCCCCCC | | | | | | |
| 23 QL IMPERIALA 🖸 🤁 🔄 LIII P P P P | | | | | | |
| Bedrooms | | | | | | |

- Place the cursor over the field of the Function room and corresponding date you wish to book. Double click. If you move the cursor over, you will see that is blue. This means you have "Marked" the room correctly. If you Mark one by mistake, simply go back over the blue field and double click again.
- 2) Repeat the above procedure for every Function Room you wish to book.
- 3) If you need to book the Function Room(s) for more than one day, go back up to the first blue field and go up to *Window Mark All Days Matching Criteria.*
- When you have "Marked" all of your Function Rooms, you are now ready to book them.
- 4) Go up to *Mark* | *Book Marked Function Rooms*. You will now be in the *Book from Marked List* Screen.

| 🌲 Bo | 🚖 Book From Marked List [nwind] - Minerals Hotel | | | | | | | | |
|---------------|---|------------|---------|---------|-------|-------|---------|----------|-----------|
| Eile B | ecord Window Help | | ▲╈₽ | ▼ 🐺 者 | | | | | |
| Bool Clier | king Number It Code | 4242 | | | | | Booking | g Status | QT |
| | | | | | | | | Book | All Rooms |
| Bld | Room | Date | Start | End | Usage | Price | | Stat | NP Event# |
| OL | GEORGIANAB | 04/18/2007 | 07:00am | 11:59pm | 17 | Thee | | N | |
| QL | GEORGIANAB | 04/19/2007 | 07:00am | 11:59pm | 17 | | | N | |
| QL | GEORGIANAB | 04/20/2007 | 07:00am | 11:59pm | 17 | | | N | |
| QL | GEORGIANAB | 04/21/2007 | 07:00am | 11:59pm | 17 | | | N | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | _ | |
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| <u> </u> | | | - | | | - | | | |
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- 5) Change Start/End Times, and Room Rental price as needed. Notice that in the top left hand side there is a unique Booking Number.
- 6) To Book either select the Book All Rooms button on the right hand side, or go up to *Window Book all Rooms*.
- 7) The Function Rooms will now show with a blue "T" on the Month View Availability Screen.
- 8) F4 to exit out and a brand new booking has been created with these Function Rooms included, or the function rooms have now been added to the original booking (if availability was checked there first).

Booking a Room - Recurring Dates or Multiple Consecutive Days

- If your criteria specified many dates and you do not wish to mark each one individually, enter in the date range for the booking in the Availability Selection Screen
- When the **One Month Availability** window is displayed, with your curser on the room, select *Mark* | *Mark All Days Matching Criteria*. This will block the room for the entire date range.
- After marking the selections, select *Mark* | *Book Marked Function Rooms*.

Reviewing What You Booked

• From either Day View, Two Week view or Month View, move your cursor to the date or time and Function Room and Drill Down (F5). This will show you the group(s) booked. If only one, it will take you into the booking. For multiple, it will list, allowing you to select and enter from there. You can also check all rooms booked for this booking on the Booking window by selecting *Window* | *Booked Function Rooms*.

How to Search for a Booking

- From the Sales and Catering Main Menu, select *Booking* | *Make/Edit Bookings*. This will display the *Make* | *Edit Bookings* window.
- Enter the particulars of the booking you are searching for and click or enter on the Search button.

| 🚖 Make/Edit Bookings [nwind] - Minerals Hotel | | | | | | | |
|--|-------------|--------------|----------|-------------|--|--|--|
| Elle Record Window Diary Help | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Search For Booking By: | | Include Past | Bookings | | | | |
| | | | - | _ | | | |
| LastName/Company | | | | | | | |
| Contact Name | | | | | | | |
| From Date | To Date | 2 | Status | All | | | |
| Description | | | | Quote | | | |
| Booking Number | | | | X Tentative | | | |
| Client Code | | | | X Confirmed | | | |
| Account Manager | | | | Cancelled | | | |
| Conf Serv Mgr | | | | Posted | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Search | New Booking | Availabilit | у | Exit | | | |

• If a Client has been categorized as an "Individual" the search will be by last name. A partial name may be entered in the Last Name/Company field.





- If a contact name is entered, SALES & CATERING will search for all bookings being handled by this contact. A partial name may be entered.
- If start date is entered, SALES & CATERING will display a list of all bookings starting with those that match your start date. Select the desired booking from this list
- If a description is entered, SALES & CATERING will display a window of all bookings starting with those that match your description. A partial description may be entered.
- If a booking number is entered, SALES & CATERING will search for the booking number and if located, will display the *Booking* window.
- If a client code is entered, SALES & CATERING will display a window of all bookings for that client code from which you may select the desired booking.

NOTE:

You may search by any combinations of the above fields, however, if you specify a booking number the search will ignore all the other values. When searching, you may wish to also **search past bookings, this may be done by clicking "X" on the** *Include Past Bookings.* If you do not select any values, the *Booking Diary* window showing all bookings will be displayed starting with the oldest currently active booking.

Changing A Booking

After finding the appropriate booking using the above search instructions, move the cursor to the desired field and make the change(s).

Checking or Changing Booked Function Rooms

To view booked function rooms for a specific booking locate the booking using the search instructions above. From the *Booking* window select *Window* | *Booked Function Rooms List*. From this window you can change the start/end times of your function room(s), change the rate for the room, delete any room(s) not needed, or book additional rooms (*Window* | *Book a Function Room*).

4.11 Wait Listing

When the same function room is booked at the same time by two or more different Bookings, Maestro recognizes this as an overbooking. To flag this easily for the user, two separate characters are used:

? = At least one of these bookings is confirmed, with one being a Tentative, or a Quote.

! = 2 of the bookings are confirmed.

W = Room time has been waitlisted, does not have any bookings, but relies on release of another room





By drilling down on any booking, you can again see all the bookings within that room, time and date. If rooms are waitlisted, you will see a "Y" in the last field titled "Wait" next to the booking that has waitlisted rooms.



| 🜲 Booke d/Wait | Booked/Waitlisted Rooms [nwind] - Minerals Hotel | | | | | | |
|----------------------------------|---|---------|----------|----------|----------------------|------|------|
| <u>File R</u> ecord <u>W</u> ine | dow <u>H</u> elp | | | | | | |
| ?\\ | | 300 | | <u>_</u> | | | |
| Building | QL | | | | | | |
| Room | GEORGIAN B | | | | | | |
| Start Date | Start | End | Booking# | Evt# | Last Name/Company | Gtd# | Wait |
| 04/14/2007 | 07:00am | 11:59am | 4240 | 1 | Kelly, Mark | 100 | N |
| 04/14/2007 | 07:00am | 11:59am | 4246 | 1 | Northwind Consulting | | Y |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | _ | | | | | | - |
| | | | | | | | - |
| | | | | | | | - |
| | - | | | | | · | - |
| | | | | | | | - |
| | | | | | | | - |
| | - | - | | | | | - |
| | | - | | | | | - |
| | - | | | | | | - |
| | | | | | | | - |
| | | | | | | | - |

If there is a waitlist room you can also see this from the booking. There with be a Red "Y" next to Wait Rm.

| | Date | Time | Day |
|-------------|------------|------|-----|
| Start | 04/12/2007 | | THU |
| End | 04/12/2007 | | THU |
| Waitlist Rm | Y | | |
| Event Date | | | |
| 04/12/2007 | Event | | |
| | | | |





4.12 Assigning Function Room Set-ups

After booking the Function Space, Book the Function Type and Set-up requirements:

- 1) Go up to *Event* | *All Sub events*. You will see the above screen for the example.
- 2) Proceed to the Function field. A Look Up (F8) will allow you to select your Function. Repeat for Set Up field. When completed, Exit (F4).

| 🌲 All Su | bEvents [mwind] - | Minerals Hotel | | | | | | | |
|------------------|--|----------------|-------|------------|--------|------------|------|--------------|------------|
| <u>File Reco</u> | Eile Record Window Help | | | | | | | | |
| ? | $? \land \bigcirc $ | | | | | | | | |
| | | | | | | | | | |
| Bookin | ig Number | 4230 | Grow | th Seminal | • | | Bo | oking Status | TN |
| Client | Code | 27548 | North | nwind Cons | ulting | | | | |
| | | | | | | | | | |
| Ev# | EvntDate | Start | Sub# | End | Bld | Room | Gtd# | Function | Set Up |
| 1 | 06/01/2007 | 09:00am | 1 | 05:00pm | QL | GEORGIAN B | 40 | BREAK | BUFFET |
| 1 | 06/02/2007 | 09:00am | 2 | 05:00pm | QL | IMPFOY | 40 | MEETING | CIRCLE |
| 2 | 06/02/2007 | 09:00am | 1 | 05:00pm | QL | GEORGIAN B | 40 | MEETING | CLASSROOM |
| 2 | 06/03/2007 | 09:00am | 2 | 05:00pm | QL | IMPFOY | 40 | MEETING | U-SHAPE |
| 3 | 06/03/2007 | 09:00am | 1 | 05:00pm | QL | GEORGIAN B | 40 | LUNCH | BUFFET |
| 3 | | 09:00am | 2 | 05:00pm | QL | IMPFOY | 40 | RMDELIVERY | LIGHTSNACK |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

4.13 Changes to a Booking – Move to new date, Duplicate, Cancel, Change Times

Move to a New Date

The Client Contact calls and needs to change their booking to a new date.

- 1) Check function room availability first to make sure this can occur.
- 2) Within the booking, go up to *Edit* | *Move Booking to new Date*
- 3) Enter the new Date
- 4) Booking has now been moved to a new date

The booking will only move via this function. Maestro will not allow the user to change the date by over keying the Start and End date on the Booking screen.





| 🜲 Move Booking To New Date [nwind |] - Minerals Hotel |
|-----------------------------------|--------------------|
| File Record Window Help | |
| | |
| Original Start Date | 06/01/2007 |
| New Start Date | 06/01/2007 |
| | |
| OK | Cancel |

Duplicating the Booking

The Client Contact calls to say they are interested in having the exact same function a month from now. To duplicate the booking they are interested in:

- 1) First check function room availability for the dates they have in mind.
- 2) Go up to *Window* | *Duplicate Booking*
- 3) All default fields on this screen will be Y. Change as needed. Use caution if using the enter key through all fields as it will change the field to an "N" for No.
- 4) Enter the new Booking Start Date

Below reveals the options available when duplicating a booking.

Y= copies from original, N= does not copy, will be creating new information

| 🜲 Duplicate Booking [nwind |] - Minerals Hot | el | | | | | |
|---|--------------------|------------|------------------------|-------|----------------|----|--|
| <u>File R</u> ecord <u>W</u> indow <u>H</u> elp | | | | | | | |
| | | | | | | | |
| Booking Number | 4237 | Conference | | | Booking Status | TN | |
| Client Code | 275 4 8 | Northwind | Consulting | | | | |
| | | | | | | | |
| Duplicate? | Y | 7N | | | Y/N | | |
| Text | | Y Adva | ance Deposits | | Y | | |
| Contacts | | Y Staf | f Hours Worked w | /Text | Y | | |
| Authorizations | | Y Attri | butes | | Y | | |
| Service Chg Exemptio | ns | Y Tax | Exemptions | | Y | | |
| Events | | Y Activ | ities | | Y | | |
| Event Text | | Y Activ | ity Text | | Y | | |
| Event Rates | | Y Deliv | Delivery Location Text | | Y | | |
| Delegates | | Y | | | | | |
| Sub-Events | | Y Food | d & Beverage w/T | ext | Y | | |
| Sub-Event Text | | Y F&B | Modified Text | | Y | | |
| Special Charges w/Te | xt | Y F&B | Item Substitution | า | Y | | |
| Functions Rooms Boo | ked | Y Inve | ntory Items w/Te | xt | Y | | |
| Billing Text | | Y Sub | -Event Delivery Te | ext | Y | | |
| | | | | | | | |
| New Booking Start Da | ite | 01/02/2008 | | | | | |
| | | | | | | | |
| | | OK | Cancel | | | | |





A screen will confirm that there is a new booking created:

| 🚓 Booking Duplicated [nwind] - Minerals Hotel | |
|--|-----|
| Eile <u>R</u> ecord <u>H</u> elp | |
| | - |
| | |
| Booking Number 4247 has been crea | ted |
| | |
| | |
| l or l | |
| UK | |

<u>Canceling the Booking</u> The Client Contact needs to cancel the booking.

- 1. Change the Status of the booking to XL or Cancel on the booking screen where it was saying Tentative, Confirmed.
- 2. A Booking Cancellation screen will appear. Choose a Cancel Code (F8 to look up) and click "OK"

| 🚓 Booking Cancellation [nw | rind] - Minerals Hotel | | | | | | |
|--|----------------------------------|--------|--|--|--|--|--|
| Elle Record Window Help | | | | | | | |
| | | | | | | | |
| Booking Number | 4230 Growth Seminar Booking Stat | tus TN | | | | | |
| Client Code | 27548 Northwind Consulting | | | | | | |
| Cancel Date Cancel Code Cancel Clerk | 04/12/2007 CANC NWIND | | | | | | |
| OK | Cancel | | | | | | |

If nothing has been posted, this screen will appear for the "outstanding" balance:

| Information | | | × |
|--------------------|-----------------------|-----|---|
| Program Message | scbookca o/s OK | .00 | |





Changing Booked Function Room Times

| 🌲 Event Details [nwind] - Minerals | Hotel | | | | | | |
|--|--|--|---|--|--|--|--|
| <u> Eile R</u> ecord <u>W</u> indow <u>E</u> vent <u>S</u> ubEvent R | Eile <u>R</u> ecord <u>Window Event</u> <u>SubEvent</u> Reports <u>Audit</u> <u>H</u> elp | | | | | | |
| | | | | | | | |
| Booking Number 4230 | Growth Seminar | Booking Status | XL | | | | |
| Client Code 27548 | Northwind Consulting | | | | | | |
| Event Number 1 | Booking From 06/01/2007 | FRI to 06/03/2007 | SUN | | | | |
| Description Growth Seminar Event Date 06/01/2007 Exp Adults 40 Exp Children | FRI FOOD/BEV | Audit Status Property Code Event Text Event Del Text INVENTORY CH# | L ARGES | | | | |
| Start Sub# End Bid)9:00am 1 05:00pm QL 09:00am 2 05:00pm QL 09:00am 3 09:00pm QL 00:00am 3 09:00pm QL 00:00am 3 09:00pm QL 00:00am 3 09:00am 3 00:00am 3 0 3 0 00:00am 3 3 0 3 00:00am 3 3 3 3 00:00am 3 3< | Room Gtd# Fur BALMORAL 40 BR BALMORAL 40 ME BALMORAL 40 ME EMERALD 40 Image: State | Set Up F EAK BUFFET Y IETING CIRCLE V INRR BUFFET V IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII | In Sp ST DT In Sp In In In In In In In In <td< td=""></td<> | | | | |
| SubEvent Desc Growth Seminar | • | Responsibility | MARK | | | | |

In the above example, the Balmoral Room is Booked from 9am-5pm. This room needs to be further booked to 6pm. The new time can be **keyed in**, and the following screens will appear:

| Dialog | × |
|---|---|
| This action affects the booking time. Do you wish to change the booking time? | |
| Cancel | |

Selecting "OK" will change the time the Function Room is booked to 6pm. If the Room was not available, a pop-up window would indicate that the room is already in use and cannot be extended.





| Dialog | | × |
|-------------------------------|--------------------------|---|
| Room previou Northwind Pro | sly booked by perties | |
| | ОК | |
| | Use ESC to Cancel | |

4.14 Guest Bedroom Availability

- 1) From the Main Screen: *Make* | *Edit Bookings* | *Availability*
- 2) From the Booking: *View* | *Booking Availability*.

What you will see:

Day View and Month View will show the number of bedrooms available in the top left hand corner field that says "Bedrooms".

Month View: Green Y's at the bottom of the screen indicate if bedrooms are available. If there are no bedrooms available, the field will be red and blank.

GRC Availability will show the number of guest rooms available above each day

To view what type of bedrooms are available:

Day View, GRC Availability and Month View: Window Room Type Space Chart Or

GRC Availability – Drill down (F5) on the number of guest bedrooms at the top of the screen **Month View –** Drill down (F5) on the green "Y" at the bottom of the day





4.15 Group Block – Booking Guest Bedrooms

| 🌲 Booking [nwind] | - Minerals Hotel | | | | | | | | | X |
|------------------------|-------------------|------------------------------|---------------|--------|------|------------|-------|------------|-------|----|
| File Record Edit Winde | ow View Event For | m Reports Audit H | elp | | | | | | | |
| | Booking Availabi | ility Reservation mary | | | | | | | | |
| Booking# | 4239 | Status | CF CONFIRM | ED | (| Owner Pr | ор | QL | | _ |
| Acct Managr | MARK | Text N | Conf Serv Mgr | WE | NDY | | | Booking Te | ext | Ν |
| Client | 27548 | Northwind Co | onsulting | | | | | | Text | Y |
| Bill To | 27548 | | | | | | | | | |
| Description | Conference | | | | Roc | om Nights | 5 | 27 | | |
| Contact | Stephen Sm | iith | | | Auc | lit Status | | | | |
| Onsite Cntct | | | | | Dec | cision Dat | e | 01/02/2007 | 7 | |
| Folio/Event | G | Mkt Segme | nt COR | | Cor | ntract Due | e | 01/02/2007 | 7 | |
| Bill Terms | SPECIAL | Billing Text | Y | | Res | Method | | RM LIST | | |
| Srce of Bus | REF | | | | | | | | | |
| | Date | Time | Day | | | Expecte | d | Guarante | ed | |
| Start | 09/10/2007 | 10:00am | MON | Adults | ; | 21 | L | 21 | | |
| End | 09/12/2007 | 05:00pm | WEC | Childr | en | | | | | |
| Waitlist Rm | Ν | | | | | | | | | |
| Event Date | | | | Evt# F | B In | Sp Rm | Event | Total | | Ad |
| 09/10/2007 | Conference | | | 1 | | Y | | 2 | 76.00 | |
| 09/11/2007 | Conference | | | 2 Y | Y | 2 | | 2,4 | 01.60 | |
| 09/11/2007 | Private Dinner | r | | 4 Y | | Y | | 2,8 | 40.78 | |
| 09/12/2007 | Conference | | | 3 Y | Y | 2 | | 2,4 | 01.60 | |

To Book Guest Bedrooms:

1) In the Booking Screen, go up to: *View* | *Group Bedroom Reservation* The following dialog box will appear:

| Dialog | | × |
|--|--------|--------|
| Confirm To Make A Group Bedroom Reser | vation | |
| OK | Lookup | Cancel |

2) If a Reservation DOES NOT exist within the front desk, choose OK to create. If one does exist, use the Lookup. The following Screen will appear:

If you choose lookup, all front desk group bookings within booking date will appear.





This is the Group Reservation Screen:

| 🚓 Group Reservations [nwin | d] - Minerals H | otel | | |
|---|---|------------------------|-------------|------------|
| <u>File R</u> ecord <u>S</u> tatus <u>W</u> indow F | <u>o</u> rms <u>A</u> ddresses <u>I</u> n | ventory Help | | |
| | | | | |
| Reservation# | 72977 | | | RESERVED |
| Crown Name | Northwind C | on outling | Driavity Dt | |
| Group Name | | | Priority Rt | |
| Arrival | 01/02/2008 | 10:00am WEDNESDAY | Special Rt | |
| Num Nights | 2 | | Rm Nts Blkd | |
| Departure | 01/04/2008 | 05:00pm FRIDAY | #Persons | |
| Tour Operator | | | Room List | |
| Event | CONFERENC | E | | |
| Group Post | N Maste | er Folio Temp STANDARD | Activities | |
| A/R Name | | | Other Chrg | |
| | | | | |
| Guaranteed By | | Settle By CASH | PreAuthAmt | |
| Acct Manager | NWIND | BillingTxt | Balance | |
| Credit Limit | | | Deposit Req | |
| Guest Type | FACULTY | Group Type FRAT | • | |
| Srce Of Bus | | | Meal Count | Trace Msg |
| Cut Off Days/Date | | Cycle | About Text | Convenors |
| , . | | | Ckin Text | Ckout Text |
| | | | | |
| | More | Checkin | Cancel | POS |

Reservation # - Unique Reservation number assigned to this Group.

Group Name - Auto-populated

Arrival – Auto populates with time and date of Sales and Catering Booking – change to suit hotel standard. **Num Nights** – Auto-populated

Departure – Auto-populated

Event – Key in the name that the Client Contact is referring to it as. This is free form.

Group Post – Y for Yes (will post rooms to group folio), or N for No

Master Folio Template - Only required if Group Post is Y. Can specify billing instructions

A/R Name – This is the name of the A/R account that has been set up

The clerk has to have the authorization level required to do this. Start typing the first 3 letters to see if there is one available. If an A/R account already exists, a list will show to choose from. When creating one, ensure to link the existing Client Profile with the Guest Bedroom Block, instead of creating a new profile. **Guaranteed by-** Look Up (F8) here to see the options:

A/R, Cash Received, Credit Card, Clerk (For cash, a deposit has to already have been received) Account Manager – This is the Sales Manager

Billing Text- Same as Sales and Catering

Credit Limit- Do a Look Up (F8) here to establish a Credit Limit if necessary.

Guest Type- Do a Look Up (F8) here to choose a Guest Type. This controls the Rate.

Group Type- Do a Look Up (F8) here to choose a Group Type. For Marketing

Source of Business – Do a Look Up (F8) here to choose Source

Cut off Days/Date – This is to establish a day to release all rooms that have not been "picked up" within the block. Release will occur during the night audit process for the date specified. There is a Calendar option here (F8)





Cycle – Instead of having the system release ALL rooms on a cutoff date at the night audit, a cycle can be is to release the block one day at a time, or 2 days at a time.

Priority Rate – This is based on the Guest Type that was selected.

Special Rate – This has to be filled in for Crystal Reports. This is breaking down the rate for the group.

Below outlines the rate for the group before arrival, during stay, and after arrival. Posting codes can be setup to ensure revenue is allocated appropriately. This will allow you to create privilege rates for guests if they choose to stay extra days outside of their group block.

| 🌲 Gro | oup Rates Entry | [nwind |] - Minerals Hotel | | | | | | × |
|---------------|-------------------------------|--------------|--------------------|--------|-------------|----------|--------------|------|---|
| <u>Eile R</u> | ecord <u>W</u> indow <u>H</u> | <u>t</u> elp | | | | | | | |
| ? | | | | | | | | | |
| Grou | ıp Reservat | ion | 72977 | | | Arr Date | 01/02/2008 | | |
| | | | Northwind Cons | ulting | | Num Ngt | s 2 | | |
| Rate | By Person | | N | | | Dep Date | 01/04/2008 | | |
| | | | | | | | | | |
| Bld | Rm Type | #Sh | Before Arriv | Post | During Stay | Post | After Depart | Post | Ι |
| <u>QL</u> | KING | | 120.00 | AFR | 100.00 | GPR | 120.00 | AFR | Ν |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

Rate by Person - N for No, Y for Yes (based on room or individual)

I –Is this room type included in the Group Block? Maestro will put automatically put a Y or N NOTE the Blank field to the right of the price points. By Drilling down (F5) you can access the opportunity to create a **PACKAGE BREAKDOWN**

| 🌲 Daily | Package Breakdov | wn [nwind |] - Minerals Hotel | | | | | | |
|-----------|---|-----------|--------------------|-------|---------|------|---|--------|--------------------|
| Eile Reco | ord <u>W</u> indow <u>H</u> elp | | | | | | | | |
| ? | | | U A A A | | | | | | |
| Rate 0 | ategory | | ROOM | | | | | | |
| Rate 7 | ype | | 72977 | | | | | | |
| From | Date | | 01/02/2008 | | | | | | |
| Buildir | a | | · · · | | | | | | |
| Room | Type Code | | | | | | | SELECT | |
| | .,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | | | | | _ | | |
| Post | Category | Gsts | Total Amount | | Percent | PPsn | т | Clerk | Last Date/Time |
| AFP | ADULTS | 99 | | 20.00 | | RSRV | Y | NWIND | 04/12/2007 04:00pm |
| BQF | ADULTS | 99 | | 65.00 | | RSRV | Y | NWIND | 04/12/2007 04:00pm |
| OAVI | ADULTS | 99 | | 15.00 | | RSRV | Y | NWIND | 04/12/2007 04:00pm |
| | | | | | | | Г | | |
| | | | | _ | | | Г | | |
| | | | | | | | | | |
| | | | | | | | F | | |
| | | | | | | | F | | |
| | | | | | | | F | | |
| | | | | | | | F | | |
| Descri | ption Co | onferenc | e Room | | | 1 | 1 | | |





Choose "Select" to apply the package and the field will populate with the breakdown defined by the template. Change as necessary; this will not affect the original template

To Block Rooms:

In the Group Reservation Screen:

- 1) Go up to *Inventory* Group Block
- 2) The days marked in red are those nights relating to the booking
- 3) Find the Room Type you wish to block by using Page Down.ZZZ = Run of House if applicable
- 4) Move the cursor to the Block field below the number in red. Key in the amount required.
- 5) If blocking a number of days, use F8 to access the Multiple Room Booking Screen
- 6) Follow the instructions

| 🚓 Group Block [mwind] - Minerals Hotel | |
|--|--|
| File Record Window Inventory Help | |
| | |
| Reservation# 72977 Northwind Consulting Arrival 01/02/2008 | |
| Num Nights 2 Departure 01/04/2008 | |
| JANUARY 2008 WED THU FRI SAT SUN MON TUE WED THU FRI SAT SUN MON TUE | |
| 2 3 4 5 6 7 8 9 10 11 12 13 14 15 Building RoomTyp Avl | |
| QL KM 10 10 10 10 10 11 < | |
| QL KO 8 | |
| QL TTM 12 | |
| QL TTO 16 | |
| DEFINITE TOTAL TENTATIVE TOTAL | |





4.16 Advance Deposit Request

To add an Advance Deposit to the Contract:

- 1) Booking Screen
- 2) Window Advance Deposit
- 3) **Dep Due** –Look Up F8 for calendar
- 4) **Bldg** Ignore
- 5) Amt Due What is the Amount Due?
- 6) **Clerk –** who is requesting it Reference Useful for a booking such as a Wedding when there are several deposits due

| 🚓 Advance Deposits [nwind |] - Minerals Hot | el | | | | |
|---|------------------|----------------------|--------------------|----------|----------|----------|
| <u>File R</u> ecord <u>W</u> indow <u>A</u> udit <u>H</u> e | lp | | | | | |
| | | | | | | |
| Booking Number | 4239 | Conference | | Bookin | g Status | CF |
| Client Code | 27548 | Northwind Consulting | | | | |
| | | | | | | |
| | | | Total Deposits Due | | | 2000.00 |
| | | | | | | |
| | | | Total Due To Date | | | 2,000.00 |
| | | | Total Received | | | |
| | | | Amount Outstandii | ng | | 2,000.00 |
| | | | | | | |
| Dep Due Bk | lg Event# | # Amt Due | Clerk R | eference | | |
| 04/12/2007 | | 2,000.00 | NWIND | | | |
| | _ | | | | | |
| | _ | - | | | | |
| | _ | | | | | |
| | | | | | | |

TO POST AND ADVANCE DEPOSIT:

Select Window | Post Advance Deposit

A posting code or method of payment will be required. You may key over the amount if not all is received.

| 🜲 Post Advance Deposit Payment [nwind] - Minerals Hotel | | | | | | | | |
|--|--------------------------------|--------------------|----------------|----|--|--|--|--|
| Elle Record Window Help | | | | | | | | |
| | | | | | | | | |
| Booking Number | 4239 Cor | nference | Booking Status | CF | | | | |
| Client Code | 27548 No | rthwind Consulting | | | | | | |
| Posting Code Dep Amount Due Date Effective OK | 2,000.00 04/12/2007 Canc | el | | | | | | |





4.17 Assigning of Traces

The final stage to completing the booking before the contract is to assign the Booking Traces. As discussed in the Client Profile, Traces are reminders. In this case, these are reminders about the Booking itself. Most of these traces will be set-up prior to system training and will be assigned to auto-generate according to a pre-defined date.

To view traces:

From the Booking Screen:

- 1) Go up to *Window* | *Booking Trace*
- 2) Reassign a Clerk if necessary.

Traces are only created upon exiting the booking initially. You must go back to the booking to edit them.

| 🚓 Booking Trace [n | wind] - Miner | als Hotel | | | | | |
|------------------------------------|----------------|-----------------|----------|------------------|------|------|-----|
| <u>File R</u> ecord <u>W</u> indow | Help | | | | | | |
| ? \`Q + | | $00 \approx 10$ | | | | | |
| | | | | | | | |
| Booking Numb | er | | 4239 | | | | |
| - | | | | | | | |
| Date Start | Time | Trace | To Clerk | Subject | Done | Кеер | Cnf |
| 09/03/2007 | 06:00am | BEO | MARK | BEO Meeting | Ν | Y | Ν |
| 04/14/2007 | 10:28am | CONT | MARK | Contract Due | N | Y | N |
| 08/27/2007 | 06:00am | ROOM | MARK | Rooming List Due | N | Y | N |
| 09/19/2007 | 06:00am | THX | MARK | Thank You Letter | N | Y | Ν |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |





5 Building the Function Sheet or Banquet Event Order (BEO)

5.1 Events

Events are created when the function space is booked.

Each line represents a time frame for the event. Each line will be given a summary icon for any Food and Beverage Requirements, Inventory and Special Charges that occur in the Subevents. Also, text may be added for additional information.

SALES & CATERING can accommodate single or multiple-day events for bookings. **Events** are functions relative to the booking dates.

If the booking spans multiple days, then the booking will have multiple events. Each event can have several activities for the day Events and sub-events pertain to the actual day and time of each function that will be occurring during the dates of the booking.

Although not mandatory, the recommended method in which to use events and sub-events is to use one event per booking day and have the sub-event used to specify the start and end time of each function happening within that day

| 🌲 Booking [nwind] - | Minerals Hotel | | | | | | | | |
|--|-----------------------------------|----------------------------------|---------------|------|-------|-------------|-------------|-------|----|
| <u>File R</u> ecord E <u>d</u> it <u>W</u> indow | v ⊻iew <u>E</u> vent F <u>o</u> r | m Reports <u>A</u> udit <u>F</u> | telp | | | | | | |
| | | | | | | | | | |
| Booking# | 4239 | Status | CF CONFIRME | D | | Owner Pro | op QL | | |
| Acct Managr | MARK | Text N | Conf Serv Mgr | V | VENDY | | Booking To | ext | Ν |
| Client | 27548 | Northwind C | onsulting | | | | | Text | Y |
| Bill To | 27548 | | | | | | | | |
| Description | Conference | | | | Roc | om Nights | | | |
| Contact | Stephen Sm | iith | | | Aud | dit Status | | | |
| Onsite Cntct | | | | | Dec | cision Date | e 01/02/200 | 7 | |
| Folio/Event | N | Mkt Segme | nt COR | | Cor | ntract Due | 01/02/200 | 7 | |
| Bill Terms | SPECIAL | Billing Text | Y | | Res | s Method | | | |
| Srce of Bus | REF | | | | | | | | |
| | Date | Time | Day | | | Expected | Guarante | eed | |
| Start | 09/10/2007 | 10:00am | MON | Adu | lts | 21 | 21 | | |
| End | 09/12/2007 | 05:00pm | WEC | Chil | dren | | | | |
| Waitlist Rm | N | | | | | | | | |
| Event Date | | | | Evt# | FB In | Sp Rm | Event Total | | Ad |
| 09/10/2007 | onference | | | 1 | | Y | 2 | 76.00 | |
| 09/11/2007 P | rivate Dinne | r | | 4 | Y | Y | 2,8 | 40.78 | |
| 09/12/2007 C | onference | | | 3 | YY | 2 | 2,4 | 01.60 | |
| | | | | | | | | | |
| | | | | | | | | | L |
| | | | | | | | | | L |
| | | | | | | | | | |
| | | | | | | | | | |





5.2 Subevent (Event Details)

The Sub-event is the Event Details, and creates the Function Sheet or BEO detailing the Event.

Each Event number (date) has a series of Sub-events which hold the Event Details. This is where the Food and Beverage, Inventory and Special Charges will be built, along with any related text to further explain the details.

The first line of the subevent has been auto-populated when the booking was first created.

Each line of the Subevent represents the time and place Food and Beverage, Inventory, and Special Charges are to be delivered, set-up, prepared, etc. Additional text will be used to further enhance the BEO. All Subevent times and locations can be done first, or line by line as each line is built.

| 🌲 Event Details [| nwind] | - Minerals H | lotel | | | | | | - 🗆 🛛 |
|------------------------------------|-----------------|---------------------|--------------------------------|----------|-----------|-------------|----------------|------------|-------|
| <u>File R</u> ecord <u>W</u> indow | w <u>E</u> vent | <u>S</u> ubEvent Re | ports <u>A</u> udit <u>H</u> e | elp | | | | | |
| | | | 52~ | ╈₽ | ' | | | | |
| Booking Number | | 4239 | Conference | | | E | Booking Status | CF | |
| Client Code | | 27548 | Northwind Con | nsulting | | | | | |
| Event Number | | 1 | Booking From | 09/10/2 | 2007 M | ION to | 09/12/2007 | WED | |
| Description | Confe | erence | | | _ | Audit Statu | s | | |
| Event Date | 09/10 | 0/2007 | MON | | | Property Co | ode 🝳 | <u>2</u> L | |
| Exp Adults | | 21 | | | | Event Text | N | <u>L</u> | |
| Exp Children | | | | | | Event Del T | ext N | l . | |
| Gta Adults Ctal Children | | 21 | | | | | | | |
| Gta Unilaren Max# Tickata | | | | FOOD/REV | 1 10 | UVENTORY | | ADCEC 1 | |
| Max# Hickets | | | - | FOOD/BEV | | WENTORT | | ARGED | |
| Start Sub# | t End | Bld | Room | Gtd# | Function | Set | Up Fl | B In Sp | ST DT |
| 27:00pm | 1 11:00 | Opm QL | SHAW CAFE | 21 | RECEPTION | AS I | S | | |
| 07:00pm | 2 08:00 | Jpm QL | SHAW CAFE | 21 | RECEPTION | AS I | s Y | | |
| U8:UUpm | 3 11:00 | Jpm QL | SHAW CAFE | 21 | DINNER | R8 | ¥ | + + ¥- | |
| | | | | | 2 | | | | |
| | | | - | | 2 | | | | |
| | | | - | | 2 | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | 8.00 | | | | 2 | <u> </u> | | | |

The first Subevent line was created when the booking was created.

 1^{st} Line identifies the room setup and booking for the entire event. An **Inventory charge** has been posted 2^{nd} Line provides the time parameters and setup for an hour long Reception (7:00- 8:00). **Includes Food** and Beverage charges.

 3^{rd} Line shows Dinner service at Rounds of 8 to occur from 8:00 - 11:00 pm. Includes Food and Beverage and Special charges.





5.3 Inventory

To Add Inventory:

Be sure you are on the correct Sub-event line that you wish to add Inventory to.

- Select the Inventory button that is directly above the Function/Set-up
 - Select Subevent | Inventory Items from the menu bar
 - Drill down (F5) on the "I" in the subevent line

| 🜲 Inventory Items Selected [nwi | nd] - Minerals H | lotel | | |
|--|-------------------|------------------------------|----------------|-------------|
| <u> Eile R</u> ecord <u>W</u> indow <u>H</u> elp | | | | |
| | | | | _ |
| Booking Number | 4239 | Conference | Booking Status | CF |
| Client Code | 27548 | Northwind Consulting | | |
| Event Number | 1 | Conference | 09/10/2007 | 101 |
| Sub-Event Number | 1 | Conference | 07:00pm to 1 | 1:00pm |
| | | | QL SHAV | V CAFE |
| | | | | |
| Type Group Item | n Code | Description | NP Qty | Price(each) |
| AUDIO AUDIO COR | DLESSLAV | Wireless Lavalier Microphone | 1 | 150.00 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

1) Look Up F8 here to select the Type of Inventory you require.

2) The next field will be the Item Code. Look Up F8 here to select the Item you require. The Group will populate.

3) Fill out the quantity and price as needed.

| 🌲 Item Lookup [nwind] - Minerals Hotel 📃 🗖 🔀 | | | | | | | | |
|---|-----------------|------------------------------|--------|-----------|--|--|--|--|
| <u>File R</u> ecord <u>H</u> | Ele Record Help | | | | | | | |
| ?\` | | | | | | | | |
| Item Type | e / | AUDIO | | | | | | |
| ItemGrp | Item Code | Description | Price | Available | | | | |
| AUDIO | 8CHANNERMIX | 8 Channel Mixer | 75.00 | 2 | | | | |
| AUDIO | CORDLESSLAV | Wireless Lavalier Microphone | 150.00 | | | | | |
| AUDIO | MACKIEMIXER | 4 Channel Mackie Mixer | 40.00 | 2 | | | | |
| AUDIO | PODIUMMIKE | Podium Microphone | 30.00 | 5 | | | | |
| AUDIO | PUBLICADDRES | Public Address System | 162.00 | 2 | | | | |
| AUDIO | TABLE MIC | Table Microphone | 30.00 | 4 | | | | |
| AUDIO | WALKIE | Walkie Talkie | 30.00 | 999 | | | | |
| AUDIO | WIRELESSHAND | Wireless Handheld Microphone | 150.00 | 4 | | | | |
| | | | | | | | | |
| | | | | | | | | |

In the above Example, a Wireless Microphone is being used for Event 1, Subevent 1, for the entire duration (7-11pm) Exit F4 to return to the Subevent





5.4 Food and Beverage Items

Before adding Food and Beverage Items, it is important to add subevent lines identifying where and when it will be served.

In the Subevent example below, the first Food and Beverage service (Subevent 2) occurs from 7:00-8:00,

Be sure you are on the correct Sub-event line that you wish to add Food and Beverage.

To Add Food and Beverage:

- Select the Food/Bev button that is directly above the Function/Set-up
- Select Subevent | Food and Beverage Items from the menu bar
- Drill down (F5) on the "F&B" in the subevent line

| 🌲 Food and Beverage Items Sele | ected [nwind] - M | inerals Hotel | | | | |
|---|--------------------|---------------------------|---------|----------|-------------|--------|
| <u>File R</u> ecord <u>W</u> indow <u>A</u> dd <u>H</u> elp | | | | | | |
| | | | | | | |
| Booking Number | 4239 Conference | e | Booking | Status | CF | |
| Client Code | 27548 Northwind | l Consulting | | | | |
| Event Number | 1 Conference | e | 09/10/2 | 007 M | ION | |
| Sub-Event Number | 2 Conference | e | 07:00pn | n to D | 8:00pm | |
| | | | Q | 2L SHAW | CAFE | |
| Line Type Group Me | 1enu Code | Description | NP Q | 2ty | Price(each) | Т |
| 10 HSTBAR LIQUOR DE | ELBRAND | DELUXE BRANDS 40 O.Z. | | 21.00 | | 125.00 |
| 20 RECEPT CANAPE HS | ISSMOKEDSALM | HOUSE SMOKED SALMON - CAN | | 21.00 | | 9.00 |
| 30 RECEPT DELHOR RE | ECEPTION | CHEF'S CHOICE HORS D'OEUV | | 21.00 | | 10.00 |
| | | | | | | |
| | | | | | | |
| | | 1 | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

1) Create (F6). A line number and it will automatically apply a Line number.

2) The second field, look Up (F8) to select the Type of Food and Beverage you require. Once you choose "Type", you will be lead to Group, which will lead you to the Menu Code. The description of the Menu Code will auto-populate according to the Code.

3) The quantity and price will auto-populate according to the guaranteed number or how the "serves how many" was set up in Maintenance. You may make changes if required.4) Repeat steps 3-5 accordingly.





| 🜲 Food and Beverage Lo | ookup [nwind] - Minerals Hotel | | | | |
|----------------------------------|---------------------------------|-------------------------------|--|--|--|
| <u>File R</u> ecord <u>H</u> elp | | | | | |
| | | | | | |
| Menu Type | RECEPT | | | | |
| Menu Group | CANAPE | | | | |
| | | | | | |
| Menu Code | Description | Price | | | |
| EGGPLANTCAVI | Eggplant Caviar - canape | | | | |
| GRILLNEWPOTA | Grilled New Potato - Canape | | | | |
| HSSMOKEDSALM | House Smoked Salmon - Canap | | | | |
| PINWHEELSAL | Pinwheel of Smoked Salmon - Ca | | | | |
| ROASTEDPEAR | Roasted Pear with Triple - Can | | | | |
| ROSESHRIMP | Rose Shrimp on Toast - Canape | Rose Shrimp on Toast - Canape | | | |
| SALMONTARTAR | Salmon Tartare | | | | |
| SMOKEDCHICK | Smoked Chicken with Mango | | | | |
| THYMESMTOM | Thyme Smoked Tomato - Canap | | | | |
| TOMATOBRUSCH | Tomato Bruschetta - Canape | | | | |

When finished, exit F4 back to the subevent details.

*If the Type and/or Group is not applicable, or it is a **Temporary Item**, these can also be added. See below section **Addition of Temporary Items.**

5.5 Addition of Temporary Items

Temporary items codes are created when a menu code does not exist. This could be a special request, or a new item has not yet been added to the database.

There are 2 steps. One is to create it, the other to add it to the Food and Beverage selections.

To create a Temporary Menu Item:

- 1) Go up to Add [New Temporary Item
- 2) Create a Menu Code (as done in Maintenance)
- 3) Be sure to fill in the Food and Beverage Field with FOOD or BEV
- 4) Add text if necessary to save yourself from having to go back again
- 5) F4 to exit out.

In the below example, a **White Wine** menu item was created for a wine service with dinner. The item notes that one bottle will serve 6 glasses.





| 🚖 Food and Beverage Temporary Code Maintenance [nwind] - Mi | | | | | |
|--|----------|-----------|------|---|--|
| <u>File R</u> ecord <u>W</u> indow <u>H</u> elp | | | | | |
| | 105 | | | 2 | |
| | DINUMERU | _ | | | |
| Menu Code | DIMWIN | Ε. | | | |
| | _ | | | | |
| Description | Dinner W | /ine Serv | vice | | |
| Menu Type | WINE | | | | |
| Menu Group | WHITE | | | | |
| Price | | 39.00 | | | |
| Cost | | 12.00 | | | |
| Serves How Many | 6.00 | | | | |
| F&B Category | BEV | | | | |
| Posting Code | BQW | | | | |
| Svc Chg Type | 15Q | | | | |
| Svc Chg Type | | | | | |
| Svc Chg Type | | | | | |
| Svc Chg Type | | | | | |
| Restriction Code | | | | | |
| Temporary | Y | | | | |
| Serving Unit | BOTTLE | | | | |

To add the Temporary Item:

- 1) Create F6 a Line Number
- 2) Choose the Type and Group field that the Temporary Item was created under. **Don't Look Up F8** on the Menu Code because that is telling the system to look at the non-temporary codes.
- 3) You may now lookup (F8) and your item should appear. You can also go to *Window Temporary Item Window* with you curser on Menu Code to retrieve the same information.

Note: If you are uncertain what Menu Type and Group you selected, choose Add/New Temporary Item, and hit Page Down (PgDn), to reveal your previously added item

NOTE - There has been text added to this item. See Text Locations below for summary.

| 🌲 Food | d and Bever | age Items | Selected [nw | vind]-M | inerals Hotel | | | | | | × |
|----------|-----------------------|---------------------------------------|--------------------|-----------|--|--------|----------|-------|-------------|--------|----------|
| File Re | cord Window | Add Hel | p | | | | | | | | |
| ?` | Look Drillo Tem | up own oorary Item ^y | F8 F5 Window | | | | | | | | |
| Booking | Nun Sele | t Items Fron | n List | Conferen | ie | Bookir | ng Stati | us | CF | | |
| Client C | ode Food | /Beverage D | etail | Northwine | d Consulting | | | | | | |
| Event N | umber | | 1 | Conferen | ie die die die die die die die die die d | 09/10 | /2007 | M | ION | | |
| Sub-Eve | ent Number | | 2 | Conferen | ce in the second se | 07:00 | pm | to O | 8:00pm | | |
| | | | | | | | QL | SHAW | CAFE | | |
| Line | Туре | Group | Menu Code | 9 | Description | NP | Qty | | Price(each) | | т |
| 10 | HSTBAR | LIQUOR | DELBRAND | | DELUXE BRANDS 40 O.Z. | | | 21.00 | | 125.00 | |
| 20 | RECEPT | CANAPE | HSSMOKEE | SALM | HOUSE SMOKED SALMON - CAN | | | 21.00 | | 9.00 | |
| 30 | RECEPT | DELHOR | RECEPTION | V | CHEF'S CHOICE HORS D'OEUV | | | 21.00 | | 10.00 | |
| 40 | WINE | WHITE | DINWINE | | DINNER WINE SERVICE | | | 3.50 | | 39.00 | × |
| | | | - | | | [| | | | | - |
| | | | - | | | | - | | | | - |
| | | | - | | | | | | | | |
| | | | | | | — [- | | | | | F |
| | | | | | | | | | | | Ē |





5.6 Special Charges

Special Charges are charges that are not Inventoried or counted. These are additional charges to the booking. Examples would be carving fee, cake cutting fee, or a corkage fee.

To add Special Charges:

Be sure you are on the correct Sub-event line that you wish to add the Special Charge to.

- Select the Special Charge button that is directly above the Function/Set-up
- Select Subevent | Special Charges from the menu bar
- Drill down (F5) on the "SP" in the subevent line

| 🌲 Special Charges Selected [nw | ind] - Minerals I | lotel | | |
|---|--------------------|--------------------------------|--------------------|--|
| Eile <u>R</u> ecord <u>W</u> indow <u>H</u> elp | | | | |
| | | | | |
| Booking Number | 4239 | Conference | Booking Status CF | |
| Client Code | 27548 | Northwind Consulting | | |
| Event Number | 1 | Conference | 09/10/2007 MON | |
| Sub-Event Number | 3 | Conference | 08:00pm to 11:00pm | |
| | | | QL SHAW CAFE | |
| Type Group Cha LABOUR KITHC CHE Image: Strategy of the strategy o | rge Code F | Description Chef in Attendance | NP Qty Price(each) | |

- 1) The first field is Type. Look Up F8 to select the type.
- 2) The second field is Charge Code. Look Up F8 here to select the Charge Code you require.
- 3) Group and Description will auto-populate according to the Charge Code.
- 4) Change the quantity and price if required.

Exit F4 to return to the Subevent.

In this example, a Chef in Attendance at a cost of \$250.00 was added to the price of Event number 1, Subevent number 3. This is an extra Special Charge added to the price of the group's Dinner Buffet.



| 🌲 Special Ch | narge Lookup [nwind] - N | linerals Hotel | | | | | |
|------------------------------|---------------------------|--------------------|--------|--|--|--|--|
| <u>File R</u> ecord <u>H</u> | <u>H</u> elp | | | | | | |
| ?\ | | | | | | | |
| Charge Ty | уре | LABOUR | | | | | |
| ChrgGrp | Charge Code | Description | Price | | | | |
| KITHC | CHEF | Chef in Attendance | | | | | |
| LABOUR | BARTENDER | Bartender | 50.00 | | | | |
| LABOUR | CORKAGE | CDC Corkage Fee | 3.00 | | | | |
| LABOUR | ICESCULPTURE | Ice Sculpture | 250.00 | | | | |
| LABOUR | WAITSTAFF | Waitstaff Charge | 45.00 | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

5.7 Text Locations

There will be times on the BEO and other areas that you need to elaborate.

| WHAT YOU NEED: | GOES IN HERE: | FIND IT HERE: | Shows up |
|--|-------------------------------|---|----------|
| Sales to Service Notes; Any notes pertinent to the Booking only | Account Manager Text | Booking Screen Window/Account Manager Text | N/a\A |
| Food and Beverage Notes Note pertinent to items within subevents | Food and Beverage Text | Select which event/Select which Subevent Food and Beverage Text | BEO |
| Inventory Notes | Inventory Text | Same as above, select Inventory Text | BEO |
| Special Charges Notes | Special Charges Text | Same as above, select Special Charges Text | BEO |
| Set-Up Notes | Subevent Text | Same as above, select Subevent Text | BEO |
| Bar only specific Notes | Subevent Delivery Location | Same as above, select Subevent Delivery Location | BEO |
| Captain's Notes | Event Text | Booking Screen Event/ Event Text | N/A |
| Special Notes (VIP names, etc) | Booking Text | Booking Screen Window/Booking Text | CONTRACT |
| Billing and Rooming List Info for the Contract | Booking User Fields Entry | Booking Screen Window/Booking User Fields Entry | CONTRACT |
| Notes about the Client only | Client Text | Client/Client Profile/Choose the Client/Window/Text | N/A |





For example, there is a temporary item under Event number 1, Subevent number 2 that has specific notes. The item will display a "Y" under the "T" text field identifying the addition of notes for that particular item.

| scsubfbitx | X |
|--|-----------------------|
| Booking Number = 4239; Event Number = 1; SubEvent Numberr = 2; Item Line Number = 40; | OK Cancel Print |
| Wine service to be poured | |
| To be Served at END of reception - Before Dinner Service Beg | insj 🖳 |
| | |
| | |
| | |
| | |





6 Event and Sub-Event Scenarios

6.1 Changes to the Subevent

The following are common scenarios you may have to perform:

- Adding a new Function Room to an Event
- Changing the Function Room to a different room, even though the Function Sheet has been completed.
- Deleting a Function Room from the subevent if it is no longer needed.
- Duplicating the subevent to save time

6.2 Adding a Function Room

Adding an additional Function Room is the same procedure as Booking Function Space.

1) From the Event, choose *Event* | *Booked Function Rooms*. You will be taken to a list of the current rooms that the event holds, and can choose *Window* | *Book a Function Room*. Again, it is important to check for room availability prior to booking, in order to avoid wait listing rooms.

6.3 Changing the Function Room

You have to move your group into a brand new room than you had originally started with. All details have been created (Inventory and Food and Beverage). You do not want to lose the work you have done, but need to change the room where it is located.

| 🌲 Event Details [nw | nwind] - Minerals Hotel | |
|--|---|----------------|
| <u>File R</u> ecord <u>W</u> indow | w Event SubEvent Reports Audit Help | |
| | | |
| Booking Number | 4239 Conference Booking Status | CF |
| Client Code | 27548 Northwind Consulting | |
| Event Number | 1 Booking From 09/10/2007 MON to 09/12/2007 | WED |
| Description Event Date Exp Adults Exp Children Gtd Adults Gtd Children Max# Tickets | Conference Audit Status 09/10/2007 MON 21 Event Text 21 Event Text 21 Event Del Text 21 FOOD/BEV | <u>.</u> |
| Start Sub# 07:00pm 1 07:00pm 2 08:00pm 3 | # End Bld Room Gtd# Function Set Up FB In 1 11:00pm QL SHAW CAFE 21 RECEPTION AS IS 1 Y 2 08:00pm QL SHAW CAFE 21 RECEPTION AS IS Y 1 3 11:00pm QL SHAW CAFE 21 DINNER R8 Y 1 - | n Sp ST DT |





In this example, let's assume that the Dinner portion of the event is to take place in a separate room from the Reception. Currently all events are in the **Shaw Cafe**

- 1) Go back to the Booking screen and check availability as usual. Book the new room.
- 2) Once back in the Main Event Booking screen, go directly up to "Window Booked Function Room".
- 3) Delete the Room any rooms that are no longer required. In this example, we will keep them both, as we are utilizing all booked rooms.
- 4) Enter back into the subevent; the new room, the Imperial, has created a subevent under the Shaw café. This is the line identifying the room booking and time frame booked. It can be deleted, as can the Shaw Café if you choose to not have them in subevent lines. D *Note*: If you were to now return to the Booked function rooms and delete the Shaw Café, the Imperial room would be applied to all remaining events, as it would be the only available room, and Maestro would automatically apply.

| 🚓 Event Details [nv | wind] - Minerals Hotel | |
|--|---|-------------------------------|
| <u>File R</u> ecord <u>W</u> indow | v Event SubEvent Reports Audit Help | |
| | | |
| Booking Number | 4239 Conference Booking Status CF | |
| Client Code | 27548 Northwind Consulting | |
| Event Number | 1 Booking From 09/10/2007 MON to 09/12/2007 WED | |
| Description Event Date Exp Adults Exp Children Gtd Adults Gtd Children Max# Tickets | Conference Audit Status 09/10/2007 MON Property Code QL 21 Event Text N 21 Event Text N 21 Event Del Text N 21 FOOD/BEV INVENTORY | |
| Start Sub# 07:00am 5 03:00pm 4 07:00pm 1 07:00pm 2 08:00pm 3 | End Bld Room Gtd# Function Set Up FB In Sp< S 5 11:59pm QL SHAW CAFE 21 | 3T DT |

Now you can choose simply Lookup (F8) with your curser on the Shaw Care for subevent 3, Dinner, and change to the Imperial Room.



All previously assigned Food and Beverage, and Special charges have passed over to this room.

| 🚓 Event Details [nv | rind] - Minera | als Hotel | | | |
|---|---|--|---|--|-------------------------|
| File Record Window | Event SubEvent | : Reports Audit Help | | | |
| ?\\ L | | | | | |
| Bookina Number | 42 | 239 Conference | | Booking S | tatus CF |
| Client Code | 275 | 548 Northwind Consultir | ng | | |
| Event Number | 1 | Booking From | 09/10/2007 | MON to 09/12/ | /2007 WED |
| Description Event Date Exp Adults Exp Children Gtd Adults Gtd Children Max# Tickets | Conference 09/10/2007 21 21 21 | MON | =00D/BEV | Audit Status Property Code Event Text Event Del Text INVENTORY | QL N N CHARGES |
| Start Sub# | End E | Bld Room | Gtd# Function | Set Up | <u>FB In Sp ST DT</u> |
| 07:00am 5 03:00pm 4 07:00pm 1 07:00pm 2 08:00pm 3 | 11:59pm 0 11:59pm 0 11:00pm 0 08:00pm 0 11:00pm 0 | QL SHAW CAFE QL IMPERIAL QL SHAW CAFE QL SHAW CAFE QL IMPERIAL | 21 21 21 RECEPTIO 21 RECEPTIO 21 DINNER | ON AS IS ON AS IS R8 R8 | |





6.4 Moving a Booked Function Room to it's Own Event Number

This would be in the case that you want to move Event Numbers, but do not want to release the Meeting space.

| 🚓 Booking [nwind] - | Minerals Hotel | | | | | | | | X |
|--|-----------------------------------|----------------------------------|---------------|----------|-------|------------|------------|-------|----|
| <u>File R</u> ecord E <u>d</u> it <u>W</u> indov | w ⊻iew <u>E</u> vent F <u>o</u> r | m Reports <u>A</u> udit <u>F</u> | telp | | | | | | |
| | | | | | | | | | |
| Booking# | 4253 | Status | QT QUOTE | | Ov | vner Prop | p QL | | |
| Acct Managr | NWIND | Text N | Conf Serv Mgr | ANA | | | Booking T | ext | Ν |
| Client | 275 4 8 | Northwind C | onsulting | | | | | Text | Y |
| Bill To | 27548 | | | | | | | | |
| Description | Booking | | | | Room | n Nights | | | |
| Contact | Stephen Sm | ith | | | Audit | Status | | | |
| Onsite Cntct | | | | _ | Decis | ion Date | 04/27/200 | 7 | |
| Folio/Event | N | Mkt Segme | ent COR | | Contr | act Due | 04/27/200 | 7 | |
| Bill Terms | SPECIAL | Billing Text | Y | | Res I | 1ethod | | | |
| Srce of Bus | REF | | | | | | | | |
| | Date | Time | Day | | E | xpected | Guarante | eed | |
| Start | 09/10/2007 | 07:00am | MON | Adults | | 21 | 21 | | |
| End | 09/12/2007 | 11:59pm | WEC | Children | n | | | | |
| Waitlist Rm | N | | | | | | | | |
| Event Date | | | | Evt# FB | In S | p Rm E | vent Total | | Ad |
| 09/10/2007 | Conference | | | 1 Y | 1 1 1 | ′ <u>3</u> | 9 | 26.65 | |
| 09/11/2007 P | Private Dinner | r | | 2 Y | | Y | 2,7 | 52.85 | _ |
| 09/12/2007 C | Conference | | | 3 Y | Y | 2 | 5 | 52.82 | _ |
| | | | | | | - - | | | _ |
| · | | | | | | - - - | | | - |
| | | | 1 | | | | | | _ |
| | | | | | | | | | _ |
| | | | | | | | | | |

In this example, multiple meeting rooms have been booked. Each day of the meeting outlines a new Event, and Event Number. Note the number of Rooms for each booking, represented under "Rm"

09/10/2007 = Event # 1 Event # 1 = 3 Function Rooms

09/11/2007 = Event # 2 Event #2 = 1 Function Room (represented with a "Y", in that a single room has been booked

01/12/2007 = Event #3 Event # 3 = 2 Function Rooms

IT IS STRONGLY RECOMMENDED TO MOVE THE ROOM <u>PRIOR</u> TO ADDING ANY EVENT DETAILS.





The first step to remember is that the space has already been booked. At this point you are telling Maestro that you need to take that room and give it another Event number. There is no need to cancel the space and start from the beginning. The other key is to always refer back to the *Window* | *Booked Function Room* on the main booking screen.

This is your "control center" for all of the booked space for this booking. Notice on the far right hand side, under "Evnt", that each room has an Event number for the day/Event it belongs.

| 🌲 Booked Funct | ion Roor | ns [nwir | ıd] | - Minerals Hot | el | | | | | | | |
|-----------------------------------|----------------|----------|------|----------------|------------|---------|---------|--------|----------|----|---|------|
| <u>File R</u> ecord <u>W</u> indo | w <u>H</u> elp | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Booking Number | | | 4253 | Booking | | | Booking | Status | QT | | | |
| Client Code | | 2 | 7548 | Northwind Co | nsulting | | | | | | | |
| | | | | | | | | | | | | |
| Start Date Time | | BI | d | Room | End Date | Time | Usage | Rate | | NP | Μ | Evnt |
| 09/10/2007 | 07:00a | m Q | | 0102 | 09/10/2007 | 11:59pm | 17 | | 500.00 | | N | 1 |
| 09/10/2007 | 07:00a | m Q | - | FRLOBBY | 09/10/2007 | 02:00pm | 7 | | 69.65 | Γ | N | 1 |
| 09/10/2007 | 07:00a | m Q | | SHAW CAFE | 09/10/2007 | 11:59pm | 17 | 8 | 300.00 | Γ | N | 1 |
| 09/11/2007 | 03:00p | m Q | | ATRIUM | 09/11/2007 | 11:50pm | 9 | | 2,000.00 | Γ | N | 2 |
| 09/12/2007 | 07:00a | m Q | | 0101 | 09/12/2007 | 11:59pm | 17 | | 500.00 | Γ | N | 3 |
| 09/12/2007 | 07:00a | m Q | _ | GEORGIAN | 09/12/2007 | 11:59pm | 17 | | | Γ | N | 3 |
| | | | | | | | | 2 | | Γ | | |
| | | | 202 | | | | | | | Γ | | |
| | | | | | | | | | | Γ | | |
| | | | | | | | | | | Γ | Г | |

The Meeting Room 0102 for 09/10/2007 can be left as Event # 1 since it falls first and there is no need to start with it.

The FRLOBBY will be used first. Since Event number 1, 2, and 3 are already in use, the next logical number is "4". The FRLOBBY will be "moved" to it's own Event number 4.

To conduct all Event # creations, always start in the "Booked Function Room" screen. This can be found on the main booking screen on the menu drop down of *Window* | *Booked Function Rooms*

- 1) Go up to Window Book a Function Room
- 2) Fill out the details with the exact same details as used before. STOP AT THE EVENT #. See screen below:



| 🚓 Book A Function Room [n | wind] - Minerals Hot | :1 | | | |
|---------------------------|-----------------------|------------------|----------|---------------|-------|
| Elle Record Window Help | | | | | |
| | | | <u>æ</u> | | |
| Booking Number | 4253 Bo | oking | | Booking Statu | ıs QT |
| Client Code | 27548 No | thwind Consultin | a | | |
| | | | 5 | | |
| Building | 0 | | | | |
| Been | | | | | |
| Room | FRLUDDT | | | | |
| | | | | | |
| Start Date | 09/10/2007 | Start Time | 07:00am | | |
| End Date | 09/10/2007 | End Time | 02:00pm | | |
| | | | | | |
| Event Number | 1 | | | | |
| | | | | | |
| No Post | | | | | |
| Ikade Hours | 7 | | | | |
| Dries | | | | | |
| FILE | 69.65 | | | | |
| | | | | | |
| | ОК | Cancel | | | |

- 3) Notice that the system has "1" as the Event Number. This needs to change to "4".
- 4) Use to space bar to clear the number away. Press enter and the next available number will appear.
- 5) The price will stay the same since that is what the client is being charged for usage.

| 🌲 Booked Funct | ion Roo | ms [nv | vind] | - Minerals Ho | tel | | | | | | | |
|-----------------------------------|-----------------|--------|--------|---------------|------------|---------|---------|--------|----------|----|---|------|
| <u>File R</u> ecord <u>W</u> indo | ow <u>H</u> elp | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Booking Number | | | 4253 | Booking | | | Booking | Status | QT | | | |
| Client Code | | | 27548 | Northwind Co | onsulting | | | | | _ | | |
| | | | | | | | | | | | | |
| Start Date Time | | | Bld | Room | End Date | Time | Usage | Rate | | NP | w | Evnt |
| 09/10/2007 | 07:00a | am 👘 | QL | 0102 | 09/10/2007 | 11:59pm | 17 | | 500.00 | Г | N | 1 |
| 09/10/2007 | 07:00a | m | QL | FRLOBBY | 09/10/2007 | 02:00pm | 7 | | 69.65 | Γ | N | 1 |
| 09/10/2007 | 07:00a | m | QL | FRLOBBY | 09/10/2007 | 02:00pm | 7 | 3 | 69.65 | Γ | N | 4 |
| 09/10/2007 | 07:00a | m | QL | SHAW CAFE | 09/10/2007 | 11:59pm | 17 | | 300.00 | Γ | N | 1 |
| 09/11/2007 | 03:00p | m | QL | ATRIUM | 09/11/2007 | 11:50pm | 9 | | 2,000.00 | Γ | N | 2 |
| 09/12/2007 | 07:00a | m | QL | 0101 | 09/12/2007 | 11:59pm | 17 | | 500.00 | Γ | N | 3 |
| 09/12/2007 | 07:00a | m | QL | GEORGIAN | 09/12/2007 | 11:59pm | 17 | | | Γ | N | 3 |
| | | | | | | | | | | Γ | Γ | |
| | | | | | | | | | | Γ | Γ | |
| | | | | | | | | | | Γ | Г | |

The FRLOBBY now has its own unique Event number, 4. The older one falling under Event number 1 can now be deleted without losing the space. FRLOBBY Event number 1 can be deleted by placing your curser on the line and F7 (delete).



| 🌲 Booked Funct | ion Roo | ms [nw | ind] | - Minerals Hot | iel | | | | | - | |
|-----------------------------------|----------------|--------|-------|----------------|------------|---------|---------|--------|------|---|------|
| <u>File R</u> ecord <u>W</u> indo | w <u>H</u> elp | | | | | | | | | | |
| | | | | | | | | | | | |
| Booking Number | | | 4253 | Booking | | | Booking | Status | QT | | |
| Client Code | | | 27548 | Northwind Co | nsulting | | | | | | |
| | | | | | | | | | | | |
| Start Date Time | | E | Bld I | Room | End Date | Time | Usage | Rate | NP | W | Evnt |
| 09/10/2007 | 07:00a | am (| QL | 0102 | 09/10/2007 | 11:59pm | 17 | 500 |).00 | N | 1 |
| 09/10/2007 | 07:00a | am (| QL | FRLOBBY | 09/10/2007 | 02:00pm | 7 | 69 | 9.65 | N | 4 |
| 09/10/2007 | 07:00a | am (| QL | SHAW CAFE | 09/10/2007 | 11:59pm | 17 | 300 |).00 | Ν | 1 |
| 09/11/2007 | 03:00p | om (| QL , | ATRIUM | 09/11/2007 | 11:50pm | 9 | 2,000 | 0.00 | N | 2 |
| 09/12/2007 | 07:00a | am 🚺 | QL | 0101 | 09/12/2007 | 11:59pm | 17 | 500 | 0.00 | N | 3 |
| 09/12/2007 | 07:00a | am 🚺 | QL | GEORGIAN | 09/12/2007 | 11:59pm | 17 | | | N | 3 |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | Í | | | | | | | Γ | |
| | | | | | | | | | | | |

| 🌲 Booking [nwind] | Minerals Hotel | | | | | | | | |
|---|---|----------------------------------|---------------|----------|---------|---------|-------------|----------|----|
| <u>File R</u> ecord E <u>d</u> it <u>W</u> indo | w <u>V</u> iew <u>E</u> vent F <u>o</u> r | m Reports <u>A</u> udit <u>F</u> | telp | | | | | | |
| | | | | | | | | | |
| Booking# | 4253 | Status | QT QUOTE | | Ow | ner Pro | op QL | | |
| Acct Managr | NWIND | Text N | Conf Serv Mgr | ANA | | | Booki | ng Text | Ν |
| Client | 27548 | Northwind C | onsulting | | | | | Text | Y |
| Bill To | 27548 | | | _ | | | | | |
| Description | Booking | | | | Room | Nights | | | |
| Contact | Stephen Sm | iith | | | Audit S | Status | | | |
| Onsite Cntct | | | | | Decisio | on Date | e 04/27 | /2007 | |
| Folio/Event | N | Mkt Segme | ent COR | | Contra | ct Due | 04/27 | /2007 | |
| Bill Terms | SPECIAL | Billing Text | Y | | Res M | ethod | | | |
| Srce of Bus | REF | | | | | | | | |
| | Date | Time | Day | | Ex | pected | d Gua | ranteed | |
| Start | 09/10/2007 | 07:00am | MON | Adults | | 21 | | 21 | |
| End | 09/12/2007 | 11:59pm | WED | Children | า | | | | |
| Waitlist Rm | N | | | | | | | | |
| Event Date | | | | Evt# FB | In Sp | Rm | Event Total | | Ad |
| 09/10/2007 | Conference | | | 1 Y | ΥY | 2 | | 852.82 | |
| 09/10/2007 | Event | | | 4 | | Y | | 73.83 | |
| 09/11/2007 | Private Dinne | r | | 2 Y | | Y | | 2,752.85 | |
| 09/12/2007 | Conference | | | 3 Y | Y | 2 | | 552.82 | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

The above is the updated Booking. Notice that Event number 1 on 09/10/2007 has 2 rooms, and another Event line was created for 09/10/2007 with 1 room – the Front Lobby (FRLOBBY)

Any removed rooms from Booked Function Rooms will cause a placement of another meeting room within the subevent, the the removed room had been applied to.



When creating new Events for other days, for example 09/11/2007, ensure that when in the "Book a Function Room" that you manually change the dates. The original start date is always defaulted.

Completed Event Per Room Booking

| 🜲 Booking [nwind] | - Minerals Hotel | | | | | | | | | | |
|--|-----------------------------------|-------------------------|---------------|------|------|---------|---------|-------|-----------|--------|----|
| <u>File R</u> ecord E <u>d</u> it <u>W</u> ind | ow <u>V</u> iew <u>E</u> vent For | m Reports <u>A</u> udit | Help | | | | | | | | |
| ? | | | V V V 🖉 🥭 | | | | | | | | |
| | | | | | | | | | | | |
| Booking# | 4253 | Status | QT QUOTE | | | Ow | ner Pro | op | QL | | _ |
| Acct Managr | NWIND | Text N | Conf Serv Mgr | - | ANA | | | | Booking 7 | Text | N |
| Client | 27548 | Northwind C | Consulting | | | | | | | Text | Y |
| Bill To | 27548 | | | _ | | | | | | | |
| Description | Booking | | | _ | | Room | Nights | | | | |
| Contact | Stephen Sm | ith | | _ | | Audit | Status | | | | |
| Onsite Cntct | | | | _ | | Decisio | on Dat | e | 04/27/200 | 07 | |
| Folio/Event | N | Mkt Segme | ent COR | | | Contra | ict Due | • | 04/27/200 | 07 | |
| Bill Terms | SPECIAL | Billing Text | Y | | | Res M | ethod | | | | |
| Srce of Bus | REF | | | | | | | | | | |
| | Date | Time | Day | | | E | pecte | d | Guarant | teed | |
| Start | 09/10/2007 | 07:00am | MON | Adu | ilts | | 21 | | 2: | 1 | |
| End | 09/12/2007 | 11:59pm | WED | Chi | dren | | | | | | |
| Waitlist Rm | N | | | | | | | | | | |
| Event Date | | | | Evt# | FB | In Sp | Rm | Event | Total | | Ad |
| 09/10/2007 | Conference | | | 1 | Y | YY | Y | | | 552.82 | |
| 09/10/2007 | Registration | | | 4 | | | Y | | | 73.83 | |
| 09/10/2007 | Breakouts | | | 5 | | | Y | | | | |
| 09/11/2007 | Private Dinne | r | | 2 | Y | | Y | | 2, | 752.85 | |
| 09/12/2007 | Conference | | | 3 | Y | Y _ | Y | | | 22.82 | |
| 09/12/2007 | Guest Speake | r | | 6 | | | Y | | | 397.50 | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

To complete the process, delete and unnecessary meeting rooms from within each subevent. In this case, there should only be one room and subevent line in within each event.





6.5 Duplicating the Subevent details

When a Booking has similar details within the subevent;

For example, 2 meetings running at the same time with similar text and items, occurring in separate meeting rooms.

| 🌲 Event Details [nwind] - Minerals I | lotel | | | |
|--|-----------------------------------|------------------|-------------------|----------|
| <u>File R</u> ecord <u>W</u> indow <u>E</u> vent <u>S</u> ubEvent Re | eports <u>A</u> udit <u>H</u> elp | | | |
| | <u>54477</u> | | | |
| Create | | | | |
| Booking Number 4239 | Conterence | Bo | ooking Status 🛛 🕅 | F |
| Client Code 2/548 | Northwind Consulting | DOZ MON to | | |
| | BOOKING FROM 09/10/2 | UUV MON W | hatistsont wer | |
| Description Conference | | Audit Status | | - |
| Event Date 09/10/2007 | MON | Property Cor | de Ol | |
| Exp Adults 21 | , | Event Text | N | |
| Exp Children | | Event Del Te | ext N | |
| Gtd Adults 21 | | | | |
| Gtd Children | | | | |
| Max# Tickets | FOOD/BEV | INVENTORY | CHARGES | |
| | | | | |
| Start Sub# End Bld | _ Room Gtd# | Function Set U | Jp FB In S | SP ST DT |
| 09:00am 9 05:00pm QL | CARLISE 21 | MEETING U-SH | | + |
| 09:00am 11 05:00pm QL | 0101 21 | MEETING U-SH | | |
| 09.30am 10 10.00am QL | 0101 21 | DREAN | | |
| | | | | |
| | | | | + |
| | | | | |
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| | | | | |
| | | | | |
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| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | 1 | | | |
| SubEvent Desc | | Respor | nsibility | |

In the example given, the Carlise Room and 0101 Room have meetings from 9-5pm. Each meeting room is going to have the identical requirements. Here, the 0101 room is having a Coffee break from 9:30-10:00am. The Carlise room is having the same requirements at the same time.

To duplicate this:

- 1) Stay on the highlighted Sub# for the subevent line you want to duplicate
- 2) Go up to the Menu bar Subevent | Duplicate Subevent
- 3) The following screen will appear:
- 4) Change the Duplicate (?) as required.



| 🚓 Duplicate Sub Event [nwir | id] - Minerals H | otel | | | |
|--|---------------------------------------|--------------|-----------|----------------|------|
| <u>File R</u> ecord <u>H</u> elp | | | | | |
| | | | | | _ |
| Booking Number | 4239 | Conference | | Booking Status | s CF |
| Client Code | 27548 | Northwind Co | onsulting | | |
| Event Number | 1 | Conference | | 09/10/2007 | MON |
| Duplicate? Sub-Event Text Food & Beverage w/T F&B Item Substitution Special Charges w/Te Inventory Items w/Te Sub-Event Delivery Te F&B Modified Text | Fext n ext ext ext ext | | | | |
| | | ОК | Cancel | | |

| 🚓 Event Details [nv | rind] - Minerals | Hotel | | | | |
|---|---|--|---|--|---|--|
| <u>File R</u> ecord <u>W</u> indow | <u>Event</u> <u>S</u> ubEvent F | eports <u>A</u> udit <u>H</u> elp | | | | |
| Create | | <u>54</u> 47 | | | | |
| Booking Number | 4239 | Conference | | Booking S | itatus CF | |
| Client Code | 27548 | Northwind Consultir | ng | | | |
| Event Number | 1 | Booking From | 09/10/2007 | MON to 09/12 | /2007 WED | |
| Description Event Date Exp Adults Exp Children Gtd Adults Gtd Children Max# Tickets | Conference 09/10/2007 21 21 21 | | =00D/BEV | Audit Status Property Code Event Text Event Del Text INVENTORY | QL N N CHARGES | |
| Start Sub# 09:00am 9 09:00am 11 09:30am 10 09:30am 12 | End Bld D5:00pm QL 10:00am QL 10:00am QL 10:00am QL | Room CARLISE 0101 0101 0101 0101 0101 0101 0101 0101 | Gtd# Function 21 MEETING 21 MEETING 21 BREAK 21 BREAK 21 BREAK | Set Up U-SHAPE INSIDE I | FB In Sp : VY I I V V YY I V V YY I I V I VY I I I V Y I I I V V I I I I I V V I I I I I I I I I I I I I I I I I I I | |

- 5) Change the Room to reflect the new one. In this example, the subevent number 12 in room 0101 will be changed to the Carlise.
- 6) Repeat as required.





6.6 Deleting a Function Room from the Sub-event

If you are deleting a meeting room from within a subevent and it is the only Event for that date that holds that room, you will see the following window:



Maestro will recognize when a room has been released, and has no other bookings within the event. It will prompt you above, to delete the reservation, and then release the meeting room back into general inventory.

6.7 Changes Notifications

Whenever there is a last minute change to a booking, whether it pertains to Food and Beverage, Inventory, Special Charges, or an entire new booking, these changes will be mailed to the appropriate clerks. Who receives the change and when, is decided by property management in the Sales and Catering Maintenance.

| 🌲 Mail Food And Beverage Changes [nwind] - Minerals Hotel | | | | | |
|--|-------------|--------------|------------------|----------------|----|
| Eile Record Window Help | | | | | |
| | | | | | |
| Booking Number | | 4240 | Booking | Booking Status | TN |
| Client Code | | 29445 | Kelly, Mark | | |
| Event Number | | 1 | Event | | |
| Sub-Event Number | | 2 | | | |
| Terminal | | 3620.NW0150. | | | |
| | | | | | |
| Clerk | Send Mail (| (Y/N) | Description | | |
| MARK | <u> </u> | | Catering Manager | | |
| NWIND | Y | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |




6.8 Summary Totals

At any time during the Booking or Quoting Process, the Client may ask for an "estimate". This can be found on the Booking Screen *Audit* | *Summary Totals*"

| 🚓 Booking Summary [nwind] - Minerals | Hotel | | |
|---------------------------------------|--------------------|-----------------|-------------|
| <u>File R</u> ecord <u>H</u> elp | | | |
| | | | |
| Booking Number 42 | 39 Conference | Booking | g Status CF |
| Client Code 275 | 48 Northwind Consu | ulting | |
| | | | |
| Total Food | 2,352.00 | Advance Depo | sits |
| Total Beverage | 866.00 | | 74342007 |
| Total Inventory Items | 507.50 | Requested | 2000.00 |
| Total Special Charges | 150.00 | Received | 2000.00 |
| Total Function Room | 500.00 | Outstanding | |
| Total Staff Services | | | |
| Total Service Charges | 696.24 | | |
| Total Basic Charges | | Inclusive Taxes | |
| Total Cover Charges | | | |
| Total Other Items | | | |
| Total Room Discount | | Guest Room Rev | |
| Total Food Discount | | Guest Room Ngts | |
| Total Bev Discount | | Guest Pkg Rev | |
| Total Taxes | 457.45 | | |
| Total Deposits | -2000.00 | | |
| | | | |
| Total Amount | 3,529.19 | OK | |

Note: In the above example, a \$2000 deposit has been received, and previously posted, from Northwind Consulting. This deposit is subtracted from the Total Amount. The Requested and Received deposit is located on the right. Be sure to ask guests if they would like to Total Due, (\$3529.19), or Total Charge (\$5929.19) for the event

6.9 Changes Log

The Changes Log will track any changes made to the Booking number. To view, you must be in the Booking Screen, *Audit* | *Changes Log*

In the below example, this event was created, changed and cancelled by clerk NWIND. If another clerk makes changes to your event, this is where this information can be tracked.



NORTHWIND

| 🚖 Changes Log [nwind] - Minerals Hotel | | | | | | | | | | | |
|---|------------------|----------|-------------|-------------------|------|----------|--|--|--|--|--|
| <u>File R</u> ecord <u>H</u> elp | Elle Record Help | | | | | | | | | | |
| | | | | | | | | | | | |
| Booking Number 4253 | | | | | | | | | | | |
| LastName/Com | npany | Vorthwin | d Consultin | ng | | | | | | | |
| | | | | | | | | | | | |
| Date | Time | Seq | Clerk | Description | Evnt | SubEvnt# | | | | | |
| 04/13/2007 | 01:34pm | 1 | NWIND | Booking Cancelled | | | | | | | |
| 04/13/2007 | 01:34pm | 2 | NWIND | SubEvent Changed | 1 | 3 | | | | | |
| 04/13/2007 | 01:34pm | 3 | NWIND | SubEvent Changed | 1 | 1 | | | | | |
| 04/13/2007 | 01:34pm | 4 | NWIND | SubEvent Changed | 2 | 1 | | | | | |
| 04/13/2007 | 01:34pm | 5 | NWIND | SubEvent Changed | 3 | 1 | | | | | |
| 04/13/2007 | 01:34pm | 6 | NWIND | SubEvent Changed | 3 | 2 | | | | | |
| 04/13/2007 | 01:34pm | 7 | NWIND | SubEvent Changed | 4 | 2 | | | | | |
| 04/13/2007 | 01:34pm | 8 | NWIND | SubEvent Changed | 5 | 1 | | | | | |
| 04/13/2007 | 01:34pm | 9 | NWIND | SubEvent Changed | 6 | 1 | | | | | |
| | | | | | | | | | | | |

6.10 Printing your work – BEO, Contract, Invoice

Version 4.6:

From the Booking Screen go up to Reports – choose what you need to print From the Subevent go up to Reports – choose what you need to print

BATCH PRINTING - Prints off more than one BEO, Contract, or Invoice at one time.







7 Auditing, Posting, and Billing

The **Audit and Posting** procedure of Maestro requires the booking to be closed. Posting will copy all charges incurred by the client to the booking/event folio. Posting will also calculate the appropriate taxes and service charges and post them to the folio. Once the charges have been posted, details are available for general ledger posting.

Event Posting - Once all the items have been audited and the event is flagged as audit done, it may be posted. Posting is a simple process that requires only selection from the menu and confirmation. The rest of the process is automated. Once posted, no changes can be made to the event, however, any additional charges or payments may be posted directly to the folio. If there are multiple events, each one must be audited individually.

Booking Posting - Once all events have been audited and posted and the booking has been audited, the booking posting may be done. The process is identical to the event posting process described above. Once a booking has been posted, no changes can be made to the event or the booking status. However, a posted booking may be duplicated.

Event Audit - The auditing component of MAESTRO SALES & CATERING requires that the completed event have the audit started indicator initiated, to avoid any further items being added from another terminal. Auditing consists of reviewing in an "Audit Window" the items initially contracted for including quantities and price and comparing this to the actual consumption. Actual consumption can be indicated and quantities and price may be modified accordingly. Each event must be audited independently. The items that must be audited for an event are

- Food and Beverage Items
- Special Charges
- Inventory Items

Once the booking has been audited, it may be posted. See the posting section for details.

7.1 Audit Menu - Booking

The following 3 steps are followed when auditing and posting a booking. Included within theses steps are the subevent audits, reviewed further below.

- 1. Mark Audit Started audit subevents (see below)
- 2. Mark Audit Done
- 3. Post Booking Charges

The following options are also available within the Audit Menu:

Booking Folio – Show the Folio Detail Entry view, outlining the Posted Payments, and current balance of the booking

Review Booking Folio - Lists all the clients Booking Folios

Unmark Audit Started/Done – Allows user to Unmark the current status and make adjustments. *Once Posted no changes can be made through Sales and Catering, must be done through Accounts Receivable.* **Summary Totals** – Reveals balance of the booking with a breakdown of charges, taxes and deposits. **Details Total** – Further Breakdown of totals, with specifics and posting codes for each posting **Changes Log** – Reveals adjustments made to booking, the date, and the user that made the changes





The first step is to mark the Booking Audit Started. Accuracy, as always is key.

| 🌲 Booking [anna 🛛] - | Minerals Hotel | | | | | | | | | | | | | |
|--|---|-----------------------------------|---------------------|--------|------|----------|----------|----------|----------|-------|-------|--------|------|-----|
| <u>File R</u> ecord E <u>d</u> it <u>W</u> indow | w <u>V</u> iew <u>E</u> vent F <u>o</u> r | rm Reports <u>A</u> udit <u>H</u> | elp | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Edit (F2) | 1050 | | | | | | | _ | _ | | b. | 1 | | |
| Booking# | 4256 | Status | CF CO | NEIRME | D | | | Own | er Pr | ор | RL | _ | | |
| Acct Managr | MARK | Text N | Cont Ser | v Mgr | | NEN | DY | | | | Booki | ng Te | xt | N |
| Client | 27548 | Northwind Co | onsulting | | | | | | | | | | Text | Y |
| Bill To | 27548 | | | | | | | | | | | | | |
| Description | Conference | | | | | | Roo | om N | lights | 5 | | | | |
| Contact | Stephen Sm | hith | | | | | Aud | lit S | tatus | | STAR | TED | | |
| Onsite Cntct | | | | | | | Dee | cisio | n Dat | e | 01/02 | /2007 | | |
| Folio/Event | N | Mkt Segme | nt <mark>C</mark> O | R | | | Cor | ntrac | t Du | e | 01/02 | /2007 | | |
| Bill Terms | SPECIAL | Billing Text | Y | | | | Res | s Me | thod | | | | | |
| Srce of Bus | REF | | | | | | | | | | | | | |
| | Date | Time | Day | | | | | Exp | ecte | d | Gua | rantee | ed | |
| Start | 04/16/2007 | 07:00am | MON | | Adu | ilts | | | 2: | Ē, | | 21 | | |
| End | 04/18/2007 | 11:59pm | WED | | Chi | drer | n i | | | | | | | |
| Waitlist Rm | N | | | | | | | | | | | | | |
| Event Date | | | | | Evt# | FB | In | Sp | Rm | Event | Total | | | Ad |
| 04/16/2007 | Conference | | | | 1 | Y | | Y | 3 | | | 18 | 0.81 | Γ |
| 04/17/2007 F | Private Dinne | r | | | 3 | Y | | Г | | | | 2,84 | 0.78 | Γ |
| 04/18/2007 | Conference | | | | 2 | Y | Y | Γ | Γ | | | 1,97 | 7.60 | Γ |
| | | | | | | F | Γ | Γ | | | | | | F |
| | | | | | | Γ | | F | | | | | | F |
| | | | | | | F | F | F | F | | | | | F I |
| | | | | | | F | F | F | F | | | | | F |
| | | | | | | F | | F | | | | | | F. |

- 1) Start in the Booking Number you require to Audit.
- 2) Check that the Event Status is Confirmed.
- 3) Check the "Bill to" field below the Client Code. This is crucial where the bill will be directed to in Accounts Receivable.
- 4) Go up to Audit Mark Audit Started'. Notice that the Audit status on the booking screen says "Started"
- 5) Go into Event #1 to the Subevent (double click on the event)

7.2 Audit Menu – Subevent

The following 6 steps are followed when auditing and posting a subevent.

- **Mark Audit Started** 1.
- 2. Food and Beverage Audit
- 5. **Mark Audit Done** 6. **Post Event Charges**
- **Special Charges Audit**
- 3. **Inventory Items Audit**
- 4.

The following options are also available within the Audit Menu:

Event Folio - Same format as Booking folio above with specific Event details Event Changes Log – Same as booking changes above Unmark Audit Started/Done - Option to adjust status to make changes

Summary Charges - Same as booking summary, with specifics for each subevent





The first step is to mark the Event Audit Started

| 🜲 Event Details [an | na] - Minerals H | otel | | | |
|---|--|-----------------------------------|---------------|--|------------------------------------|
| <u>F</u> ile <u>R</u> ecord <u>W</u> indow | <u>Event SubEvent</u> Re | eports <u>A</u> udit <u>H</u> elp | | | |
| ?\\ L | | | | | |
| Booking Number | 4256 | Conference | | Booking Stat | us CF |
| Client Code | 27548 | Northwind Consulting | | | |
| Event Number | 1 | Booking From | 04/16/2007 | MON to 04/18/20 | 07 WED |
| Description Event Date Exp Adults Exp Children Gtd Adults Gtd Children Max# Tickets | Conference 04/16/2007 21 21 21 | MONFC | DOD/BEV | Audit Status Property Code Event Text Event Del Text INVENTORY | STARTED QL N N CHARGES |
| Start Sub# | End Bld | Room | Gtd# Function | Set Up | FB IN Sp ST DT |
| 07:00am 4 | 11:59pm QL | GEORGIAN | 21 | | |
| 07:00am 5 | 11:59pm QL | CDC | 21 | | |
| 07:00am 6 | 05:00pm QL | CARLISE | 21 | | |
| 09:00am 1 | 05:00pm QL | CARLISE | 21 MEETING | U-SHAPE | |
| 09:00am 2 | 05:00pm QL | GEORGIAN | 21 MEETING | U-SHAPE | |
| 09:30am 3 | 10:00am QL | GEORGIAN | 21 BREAK | INSIDE | |
| | | | | | |
| | | | | | |
| | | | | | |

- 1) Go up to Audit [Mark Audit Started. Notice the Audit Status is set to "Started"
- Go up to Audit | Food and Beverage Audit.
 Enter through each line and make any changes to the actual quantities/prices. F4 to exit when done.

| 🌲 Foo | d and Be | verage A | udit [anna 🛛] | - Minerals Hotel | | | | | | | | |
|-----------------|------------------|------------------|----------------|-------------------|------|-----|-------|-------|---------|---------|--------------|-------|
| <u>File R</u> e | cord <u>W</u> in | dow <u>H</u> elp | | | | | | | | | | |
| | | | | | | | | | | | | |
| Booking | ı Number | | 4256 | Conference | | | | | Bookina | Status | CE | |
| Client C | ode | | 27548 | Northwind Consult | tina | | | _ | | | 1 | |
| Event N | umber | | 1 | Conference | | | | | | | | |
| | | | | | | | | | | | | |
| SbEv | Line | Туре | Group | Menu Code | NP | Qty | F | Price | | Act Qty | Actual Price | |
| 3 | 10 | CBREAK | BREAK | COOKIES | | | 2.10 | | | 3.00 | | 9.95 |
| 3 | 20 | LUNCH | BXDLUN | DELIBAGUETTE | | | 21.00 | | 12.00 | 21.00 | 2 | 12.00 |
| 3 | 30 | DINER | BUFFET | BEEFBUFFET | | | 21.00 | | 25.00 | 21.00 | | 25.00 |
| | | | | | | | | | | | | |
| | | | _ | | | | | | | | | |
| | | - | _ | | | | | | | | 2 | |
| | | | _ | | | | | | | | | |
| | | | _ | | | | | | | | | |
| | | - | _ | | | | | | | | | |
| | | | - | | | | | | | | | - 20 |
| | | | | | | - | | | | | | |
| | | | - | | — - | | | | | | | |
| | | | _ | | | | | | | | | |
| | | | | | | | | | | | | |



NORTHWIND

- 4) Repeat steps 2 and 3 for Inventory and Special Charges.
- 5) When finished, go up to *Audit | Mark Audit Done*. Notice the Audit Status is set to "Audited" for this Event.

| 🌲 Event Detai | ils [ann | a]-Miner | als H | otel | | | | | | | | | X |
|---|-------------------------------|--|-----------------------------------|---|----------|------------------------------------|---|----------------------------------|---|----------------|------------|--------|---|
| <u>File R</u> ecord <u>W</u> i | jindow j | <u>Event</u> <u>S</u> ubEver | nt Re | ports <u>A</u> udit <u>H</u> | lelp | | | | | | | | |
| | | | | | | | | | | | | | |
| Booking Number | er | · · · · · | 4256 | Conference | | | | | Booking | status | CE | | |
| Client Code | | 2 | 7548 | Northwind Co | nsultino | 2 | | | DODITIN | 300000 | 101 | _ | |
| Event Number | | 1 | | Booking From | 1 | 04/16/2 | 007 | MON | to 04/ | 18/2007 | WED | | |
| Description Event Date Exp Adults Exp Children Gtd Adults Gtd Children Max# Tickets | | Conference 04/16/2007 21 21 21 | | MON | FC | DOD/BEV | | Audit Prope Event Event | Status erty Code : Text : Del Text FORY | | DITED | | |
| Start S 07:00am - 07:00am - 07:00am - 09:00am - 09:00am - 09:30am - | 6ub# 6 6 1 2 3 | End 11:59pm 05:00pm 05:00pm 05:00pm 10:00am | Bld QL QL QL QL QL | Room GEORGIAN CDC CARLISE CARLISE GEORGIAN GEORGIAN | | Gtd# 21 21 21 21 21 21 21 21 21 21 | Function MEETING MEETING BREAK | | Set Up U-SHAPE U-SHAPE INSIDE | FB FB YY | In Sp Y | ST | |

****If you are posting audited events day by day, at this point you would go back up to** *Audit* | *Post Event.*

The below screen will appear clarifying that you want to post this booking number, and this event number.







The event will then list a "Posted" status. See Below

| 🚓 Event Details [nv | vind] - Minerals | Hotel | | | l. | . 🗆 🛛 |
|---|-----------------------------------|-----------------------------------|---------------|--|-----------------------------------|-------|
| <u>File R</u> ecord <u>W</u> indow | <u>Event S</u> ubEvent R | eports <u>A</u> udit <u>H</u> elp | | | | |
| | | | | | | |
| Booking Number | 4254 | Booking | | Booking S | tatus CF | |
| Client Code | 32211 | Northwind Canada | | | | |
| Event Number | 1 | Booking From | 04/13/2007 | FRI to 04/13/ | /2007 FRI | |
| Description Event Date Exp Adults Exp Children Gtd Adults Gtd Children Max# Tickets | Booking 04/13/2007 20 20 | FRIF | OOD/BEV | Audit Status Property Code Event Text Event Del Text INVENTORY | POSTED QL N N CHARGES | |
| Start Sub# 12:00pm 1 | End Bld | Room ATRIUM | Gtd# Function | Set Up | FB In Sp | ST DT |

- 6) Exit back into the Booking Screen. Notice that the far right hand box next to the price is marked with a "P". This means the event has been Posted. An "A" would represent an Audited state. If you forget to mark the audit done in the subevent, there will be an "S' for started.
 - P= Posted A= Audited S=Started



| NORTHWIND |
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| 🌲 Booking [anna 🛛] - | Minerals Hotel | | | | | | | |
|---|---|----------------------------------|---------------|---------|---------|----------|--------------|--------------------|
| <u>File R</u> ecord E <u>d</u> it <u>W</u> indo | w <u>V</u> iew <u>E</u> vent F <u>o</u> r | m Reports <u>A</u> udit <u>j</u> | Help | | | | | |
| | | | | | | | | |
| Booking# | 4256 | Status | CF CONFIRM | ED | Ow | ner Prop | QL | _ |
| Acct Managr | MARK | Text N | Conf Serv Mgr | WEN | IDY | | Booking Text | : <u>N</u> |
| Client | 27548 | Northwind C | onsulting | | | | т | ext <mark>Y</mark> |
| Bill To | 27548 | | | _ | | | | |
| Description | Conference | | | | Room | Nights | | |
| Contact | Stephen Sm | ith | | | Audit S | Status | STARTED | |
| Onsite Cntct | | | | | Decisio | on Date | 01/02/2007 | |
| Folio/Event | Ν | Mkt Segme | ent COR | | Contra | ct Due | 01/02/2007 | |
| Bill Terms | SPECIAL | Billing Text | Y | | Res Me | ethod | | |
| Srce of Bus | REF | | | | | | | |
| | Date | Time | Day | | Ex | pected | Guaranteed | i i |
| Start | 04/16/2007 | 07:00am | MON | Adults | | 21 | 21 | |
| End | 04/18/2007 | 11:59pm | WEC | Childre | n | | | |
| Waitlist Rm | N | | | | | | | |
| Event Date | | | | Evt# FB | In Sp | Rr Even | t Total | Ad |
| 04/16/2007 | Conference | | | 1 Y | YY | 3 | 1,263 | .60 P |
| 04/17/2007 | Private Dinne | r | | 3 Y | | | 2,840 | .78 |
| 04/18/2007 | Conference | | | 2 Y | Y | | 1,977 | .60 |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

- 7) Repeat Step 1-5 for each additional event
- 8) When finished *Audit* | *Mark Audit Done*. Notice on the booking screen that the Audit Status is set to "Audited"

| 🜲 Booking [anna 🛛] - | Minerals Hotel | | | | | |
|--|---|---------------------------------------|-----------|-----------|-------------|---------------------------------------|
| <u>File R</u> ecord E <u>d</u> it <u>W</u> indov | w <u>V</u> iew <u>E</u> vent F <u>o</u> | rm Reports <u>A</u> udit <u>H</u> elp | | | | |
| | | | 7 | | | |
| Booking# | 4256 | Status CF | CONFIRMED | C | wner Prop | QL |
| Acct Managr | MARK | Text N Conf | Serv Mgr | WENDY | | Booking Text |
| Client | 27548 | Northwind Consult | ing | | | Text Y |
| Bill To | 27548 | | | | | · · · · · · · · · · · · · · · · · · · |
| Description | Conference | | | Roo | m Nights | |
| Contact | Stephen Sm | nith | | Aud | t Status | AUDITED |
| Onsite Cntct | | | | Deci | sion Date | 01/02/2007 |
| Folio/Event | Ν | Mkt Segment | COR | Cont | ract Due | 01/02/2007 |
| Bill Terms | SPECIAL | Billing Text | Y | Res | Method | |
| Srce of Bus | REF | | | | | |
| | Date | Time Day | | | Expected | Guaranteed |
| Start | 04/16/2007 | 07:00am MOI | N | Adults | 21 | 21 |
| End | 04/16/2007 | 10:30am MO | N | Children | | |
| Waitlist Rm | N | | | | | |
| Event Date | | | Ev | ∕t# FB In | Sp Rm Event | Total Ad |
| 04/16/2007 | Conference | | | 1 Y Y | Y 2 | 1,620.60 P |



NORTHWIND 2

- 9) To post the booking charges to A/R, you have to *Audit* | *Post Booking Charges*.
 10) Once Posted, this booking has been moved into Accounts Receivable.

Notice that the Booking Status is now set to "Posted". Nothing more can be done at this point to the booking in Sales and Catering, only in Accounts Receivable to the folio.

| 🌲 Booking [anna 🔤 - | Minerals Hotel | | | | | | | | | | |
|---|---------------------------------|--|---------------|------------|-------|-------|---------|-------|--------|----------|----|
| <u>File R</u> ecord E <u>d</u> it <u>W</u> indo | w <u>V</u> iew <u>E</u> vent Fo | rm Re <u>p</u> orts <u>A</u> udit <u>F</u> | telp | | | | | | | | |
| | | <u>5</u> 247 | | | | | | | | | |
| Bookina# | 4256 | Status | PO POSTED | | | 0 | vner Pr | qo | OL | | |
| Acct Managr | MARK | Text N | Conf Serv Mar | | WEND | DY | _ | | Bookin | a Text | N |
| Client | 27548 | Northwind C | onsultina | | | | | | | Text | Y |
| Bill To | 27548 | | | | | | | | | | |
| Description | Conference | | | | | Roon | n Night | 5 | | | |
| Contact | Stephen Sm | nith | | _ | | Audit | Status | | AUDIT | ED | |
| Onsite Cntct | | | | - | | Decis | ion Dat | e | 01/02/ | /2007 | |
| Folio/Event | N | Mkt Segme | ent COR | - | | Cont | act Du | e | 01/02/ | /2007 | |
| Bill Terms | SPECIAL | Billing Text | Y | Res Method | | | | | | | |
| Srce of Bus | REF | - | | | | | | | | | |
| | Date | Time | Day | | | E | xpecte | d | Guar | anteed | |
| Start | 04/16/2007 | 07:00am | MON | Adu | ılts | | 2: | 1 | | 21 | |
| End | 04/16/2007 | 10:30am | MON | Chi | ldren | [| | | | | |
| Waitlist Rm | N | | | | | | | | | | |
| Event Date | | | | Evt# | FB | In S | 5p Rm | Event | Total | | Ad |
| 04/16/2007 | Conference | | | 1 | Y | Y | (2 | | | 1,620.60 | Ρ |
| 04/16/2007 | Conference | | | 2 | Y | Y | | | | 2,003.27 | Ρ |
| 04/16/2007 | Private Dinne | r | | 3 | Υ | | | | | 2,840.78 | Ρ |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | 0 | | | | | | | |
| | | | | | | | | | | | |





8 Checklist for Auditing your Booking

- 1)Remember, this is **NOT** an automatic process of the Night Audit as done in Front Desk The "Audit" is a function of ensuring the actual numbers and prices are in place before giving the guest a final invoice and requesting payment. This "Audit" is performed when the event is completed by the Catering/Conference Manager. The Front Desk audit has nothing to do with "auditing" your items.
- 2)Ensure that you are using the Client (Profile) Code that already has "New Account" or "Active" as its A/R status when creating a booking. If you need to create a brand new Client Profile, be sure to get all pertinent details from them such as a credit card, or request a credit application.
- 3) The day you actually perform the audit and complete your postings will fall on the Night Audit date. For example, if a function was held August 8, 9 and 10th, but was not audited and posted until August 11, the revenue will fall on the Night Audit of August 11. This will prevent backdating. If you want it to "backpost", then this option does exist in Sales and Catering Maintenance.
- 4) REMEMBER to check everyday to post and keep events charges caught up.
- 5) You cannot post a booking by accident, as you have to follow procedural steps to complete the process to prevent you from making any errors. The only way you can post by accident is to follow the instructions, but not have set your "Bill to" or "Folio/Event" correctly. Even then, it is a simple Accounting procedure to transfer folios.
- 6) You only need to audit Food and Beverage, Inventory and Special Charges.
- 7) There are 3 different folios that you may set up to serve the billing purpose of your booking. This is the "Folio/Event" field.
- **G=** "Send all charges from the Booking to the Group Master Reservation". A Group Bedroom Reservation must be created and attached to utilize this feature.
- N = "Create one folio for all of the events and send it to A/R to be billed". You can post daily to the folio and then close the booking and send it to A/.R when ready to do so.
- Y= "Create one folio per event to be sent to A/R to be billed". The best example of when to use this feature is as follows: You have a client that comes in once a month for a year for a monthly meeting. You have therefore created one event per month to build the details. When the Event (Meeting) is over, you want to be able to post it, and send it to A/R to process billing. You are not going to wait until the end of the year to bill them for all of their meetings.





AUDIT CHECKLIST FOR A/R (DIRECT BILL).

| Action: | Where to look: | | | Completed: |
|---------------------------------|----------------|--------|-----------------------|--------------------------------|
| Find the Booking you want to | Bookin | ıgs | Make/Edit | |
| audit | Bookin | ıgs | Search as required | |
| Ensure that the Booking Status | Bookin | ng St | tatus/Confirmed | |
| is "Confirmed" and that the | | | | |
| event time has passed. | | | | |
| Ensure that the "Bill to" is | Bill to | field | l on Booking | |
| where you wish the charges to | Screen | L | | |
| post. | | | | |
| Ensure that Folio/Event is | Folio/E | Even | t Field on Booking | |
| either N or Y | Screen | l | | |
| Mark the Booking Audit as | On Bo | okin | g Screen under | |
| "Started". Check the indicator | "Room | n Nig | ghts" | |
| box to ensure it says "Started" | | | | |
| Choose the Event you wish to | Double | e Cli | ck on the Event | |
| audit, and enter into the Event | Line, o | or pro | ess enter on it, or | |
| Details (Enter or F5) | Event | Edi | it Event Details | |
| Mark the Audit on the Event | Audit | Ma | rk Audit Started | |
| as "Started" | - | - | | |
| Audit Food and Beverage | Audit | Foc | od and Beverage | |
| Items | Audit | - | | Ensure that all quantities and |
| Audit Inventory Items | Audit | Inve | entory Items Audit | prices are correct! |
| Audit Special Charges | Audit | Spe | cial Charges Audit | |
| Mark the Audit as Done | Audit | Ma | rk Audit Done | |
| Post the Event Charges | Audit | Pos | t Event Charges | |
| Return to the Booking Screen | Exit, F | 74 | | |
| Repeat above steps as | N/A | | | |
| necessary for other events | | | | |
| The "Ad" on the Event line | See Ev | vent] | Line | |
| should = "A" for audited | | | | |
| Mark the Audit as "Done" on | Audit | Ma | rk Audit Done | |
| the Booking | | | | |
| Post the Booking | Audit | Pos | t Booking Charges | The charges are now sitting in |
| (even when all the events have | | | | A/R awaiting payment – be |
| been posted – this will "close" | | | | sure accounting gets a full |
| the booking) | | | | invoice to outline charges |
| Run a Closing Balance Report | Report | ts C | Closing Balance | |
| (if you are required to do so) | Report | t (ma | in Giraffe Screen | |
| | on Sale | es an | nd Catering) | |
| Once a Booking or Event is in | a "Poste | ed" | Status, it is closed. | No further transactions can |
| take place – they must be hand | lled wit | hin t | the Group Master of | r A/R. |





AUDIT CHECKLIST FOR POSTING TO GROUP MASTER

| Action: | Where to look: | Completed: |
|--|--------------------------------|--------------------------------|
| Find the Booking you want to | Bookings Make/Edit | |
| audit – | Bookings/Search as required | |
| Ensure that the Booking Status | Booking Status/Confirmed | |
| is "Confirmed" and that the | | |
| event time has passed. | | |
| Ensure that the correct Group | View Group Bedroom | |
| Master is attached. | Reservation | |
| Ensure that Folio/Event is "G" | Folio/Event Field on Booking | |
| | Screen | |
| Mark the Booking Audit as | On Booking Screen under | |
| "Started". Check the indicator | "Room Nights" | |
| box to ensure it says "Started" | | |
| Choose the Event you wish to | Double Click on the Event | |
| audit, and enter into the Event | Line, or press enter on it, or | |
| Details | Event Edit Event Details | |
| Mark the Audit on the Event | Audit Mark Audit Started | |
| as "Started" | | |
| Audit Food and Beverage | Audit Food and Beverage | |
| Items | Audit | Ensure that all quantities and |
| Audit Inventory Items | Audit Inventory Items Audit | prices are correct! |
| Audit Special Charges | Audit Special Charges Audit | |
| Mark the Audit as Done | Audit Mark Audit Done | |
| Post the Event Charges | Audit Post Event Charges | |
| Return to the Booking Screen | Exit, F4 | |
| Repeat above steps as | N/A | |
| necessary for other events | | |
| The "Ad" on the Event line | See Event Line | |
| should = "A" for audited | | |
| Mark the Audit as "Done" on | Audit Mark Audit Done | |
| the Booking | | |
| Post the Booking | Audit Post Booking Charges | The charges are now on the |
| (even when all the events have | | Group Master. |
| been posted – this will "close" | | |
| the booking) | | |
| Run a Closing Balance Report | Reports Closing Balance | |
| (if you are required to do so) | Report (main Giraffe Screen | |
| | on Sales and Catering) | |
| Once a Booking or Event is in a "Posted" Status, it is closed. No further transactions can | | |
| take place – they must be hand | lled within the Group Master o | r A/R. |





9 SUGGESTED BOOKING PROCESS PROCEDURES

Remember: **A client** is the company that requires the booking **The contact** is the one making and managing the booking for the company One Contract = One booking One BEO is auto created for each day.

- 1) Identify the Client
- 2) Identify the Contact
- 3) Create the Booking via the Client Profile, or by New Booking
- 4) Check Availability for Function and Bedroom Space
- 5) Book Function Space
- 6) Assign Function and Set-ups to Rooms
- 7) Block Guest Rooms & Create Group Rate if needed
- 8) Request an Advance Deposit for the Contract
- 9) Establish Billing and Reservation method procedures
- 10) Assign Traces





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Notation: This manual is constantly being modified to include new functions and features of the Maestro Sales & Catering module.