



Information Management  
and Technology

# LSE Rezlynx Training Work Book

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## Introduction

### Site ID's

A site ID is a unique identifier to tell the 'Rezlynx browser' what PMS site it should be loading.

### Logging On

In order to log on, the Rezlynx browser must first be launched. This is located on your desktop.

1. Type in your User ID (surname & first initial) and Password  
(This must be changed every 3 months for security purposes and must contain a minimum of 10 characters, 2 of which must be numerical).

### Home Page Configuration

Upon your first login you will see the **Home Page Configuration** screen where you can select the relevant tabs you wish to see on your home screen.

Display	Tab Description	LogOn Default	Navigation Default
<input type="checkbox"/>	Misc	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Guest List	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Functions	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Availability	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Occupancy	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Message Board	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	Dashboard	<input type="radio"/>	<input type="radio"/>

Save

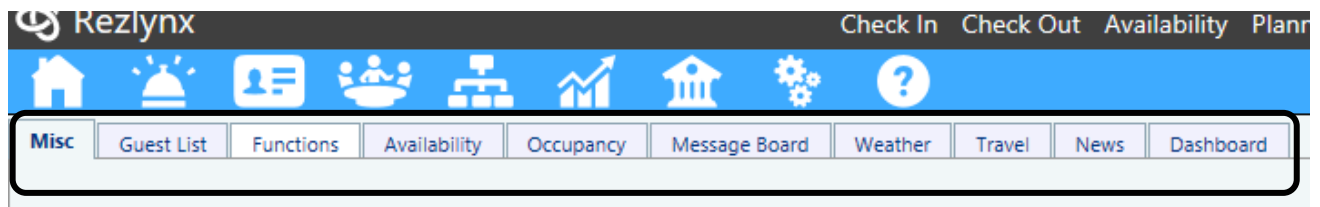
1. Tick the corresponding boxes in the Display column for each item you want to select
2. Tick in the corresponding **logon** and **navigation default** columns
3. Click **Save**

You will see your Home Page and the relevant tabs during your first log in.

## Home Page

The Home Page is user definable to a certain point, it works in a tab format and these tabs can be set to defaults when configuring your home page.

There are 10 headers you can include for your login:



### Explanation of Home Page Tabs

- **Functions** - displays all functions for that day, once functions are checked into the system it will no longer appear on this page
- **Availability** – displays house availability by room type. Also shows Out of service rooms, and arrivals and departures per day
- **Occupancy** – displays house occupancy by room type and booking status. Also displays room occupancy in bar graph format
- **Message Board** – Where you can view and write handover messages to colleagues or user groups
- **Weather** – local weather for the area can be configured to appear here via System>Configuration>Ini Settings>Home Page>Weather Region
- **Travel** – travel information can be accessed here once configured via the Hammer & Spanner/Home Page options
- **News** – news can be viewed here once configured via the Hammer & Spanner options.
- **Dashboard** – Best snapshot of the day's business, displays Arrivals, Departures, Residents, Reservations created by Channel & Entered into PMS, Current Day Stats, Previous Day Stats and Meal Plan Summary

## Main Menus

Hovering over the menu icons will show the drop down menu to access other areas of the system.

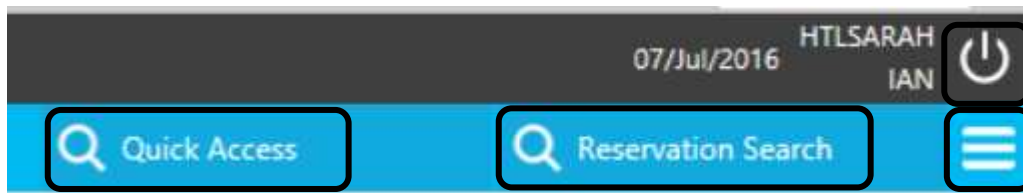


### Explanation of menu icons

- **Home** - Home Icon returns the user to the main screen in Rezlynx
- **Front Desk Bell** - Guest Journey – Property, Reservations, Groups (if activated), Room Blocks (if activated), Front Office and Billing
- **Profile (ID) Card** - Profiles – Companies and People
- **Boardroom** - Conference and Banqueting Menus – Diary - Search, Create & Edit - Function Sheets.  
Organisational Chart  
**CRS Module** – Reservations, Property, Reports, Rates and Configuration.
- **Reports Graph** - Reports – House Keeping, Front of House, Reservation, Revenue, Forecast and Sales and Marketing
- **Bank** -Accounting – Reports, Period End, Company and Central Invoicing Module
- **Cogs** - System – Codes & Rules, Rates, System and Tools  
Question Mark  
**Help** – Help, Logs and CRS Logs
- **Star** - If and when favourites have been selected a star will appear with your favorited menu options



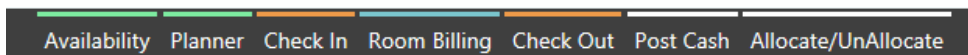
## Quick Access, Reservation Search, Log Off and the “Hamburger”



- **Quick Access** – typing part or all of the menu header will return the appropriate menu in the drop down menus.
- **Reservations Search** – typing the booking reference number in the reservation search will return reservations search result
- **Log Off (Power Symbol)** – Click to log yourself out of Rezlynx
- **“Hamburger”** – To Do’s and Email (Rezlynx not Outlook) – where you can send and see your messages internal and email external and send To-Do’s to users and groups within Rezlynx, Switch Property to change to view another Site in your group and also **My User Account**, this password protected area allows the user to define and set Hot Keys (shown below), Home Page set up, Passwords & Email Masking by User

## Hot Keys

Hot keys can be configured by the operator to display at the top of the Rezlynx page as shown below:



## Add a new hot key

1. From the **My User Account** within the ‘**Hamburger**’ click **Hot Keys**.
2. Click the **Add Hot Key** button.

My User Account

User Account **Hot Keys** Home Page Configuration

Add Hot Key

Keyboard Shortcut	Display Text	Target Page	Background Colour	Edit	Delete	▲ Up	▼ Down
F2	New Res	Rate Search	Green	Edit	Delete	▲ Up	▼ Down
F3	Res Search	Search	Green	Edit	Delete	▲ Up	▼ Down
F4			Default	Edit	Delete	▲ Up	▼ Down
F7			Default	Edit	Delete	▲ Up	▼ Down
F8			Default	Edit	Delete	▲ Up	▼ Down
F9			Default	Edit	Delete	▲ Up	▼ Down
F10			Default	Edit	Delete	▲ Up	▼ Down

Abort Close Save

3. Complete the **Add Hot Key** dialogue box and click **Save**.

### Explanation of the 'Add Hot Key' drop-down menus

- **Page** - Select the page that the new hot key should open when clicked.
- **Display Text** - Enter the name that will be displayed on the hot key button.
- **Keyboard Shortcut** - Add a keyboard shortcut.
- **Background Colour** - The default colour for a hot key is blue and matches the Rezlynx colour theme however, selecting a different colour from here will change the colour of the button.

### Edit a Hot Key

1. From the Hot Keys screen, click the **Edit** button next to the relevant hot key.
2. Make the changes, click **Save** and **Close**.

### Delete a Hot Key

1. From the Hot Keys screen, click the **Delete** button next to the required hot key.
2. Click **Save** and **Close**.

Keyboard Shortcut	Display Text	Target Page	Background Colour	Edit	Delete	▲ Up	▼ Down
F2	New Res	Rate Search	Green	Edit	Delete	▲ Up	▼ Down
F3	Res Search	Search	Green	Edit	Delete	▲ Up	▼ Down
F4			Default	Edit	Delete	▲ Up	▼ Down
F7			Default	Edit	Delete	▲ Up	▼ Down
F8			Default	Edit	Delete	▲ Up	▼ Down
F9			Default	Edit	Delete	▲ Up	▼ Down
F10			Default	Edit	Delete	▲ Up	▼ Down

The **Up** and **Down** keys can be used to reorder the display of the hot keys.

Clicking the **Save Order** button will save the reordered hot keys; clicking the **Close** button will close the page.

## CRS Reservation

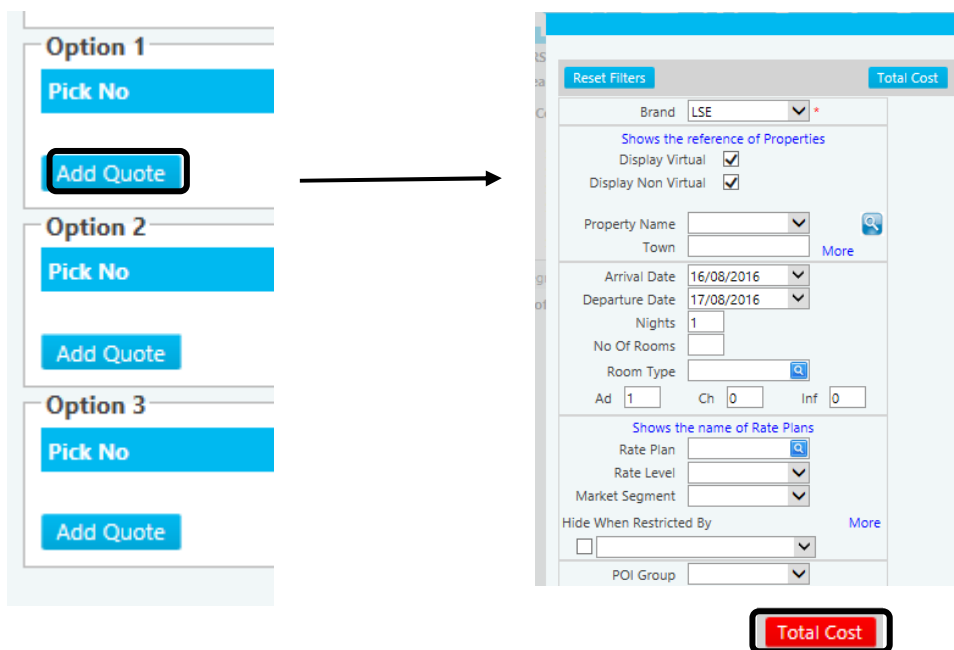
### Making a Reservation



1. Click on the **CRS Module** icon (organisational chart).
2. From **reservations** click on **Enquiries**.
3. This will take you through to the enquiry section.
4. Click **create** to start.

### Quote an option to a potential customer

1. From Option 1, click the **add quote** button.  
This will take you to the rate search screen and you can search by the customer's requirements.
2. When you have chosen the right requirements click on the **total cost** button to add the option to the customer's quote. (You can add many quotes to the enquiry).



3. Enter the customers surname into the surname box and click the **Link**.

From clicking the Link button this will search the system to see if the customer has stayed before.

**Add New Profile**

Smart Search

**Advanced Profile Search Parameters**

Surname: Booking x      Passport Number: \_\_\_\_\_  
 Forename: \_\_\_\_\_      Area: \_\_\_\_\_  
 Street: \_\_\_\_\_      County: \_\_\_\_\_  
 Town: \_\_\_\_\_      Postcode: \_\_\_\_\_  
 Country: \_\_\_\_\_      Email: \_\_\_\_\_  
 Telephone Number: \_\_\_\_\_      Company Name: \_\_\_\_\_

Reset Filters    Export Results

Profile Ref	Salutation	Surname	Forename
PF000014	Mr	Booking	Test

- If the customer has stayed before click on the **Profile Ref Number**
- If the guest has not, click on the **Add New Profile** button

**Personal**

Profile Type: Private v  
 Type of Person: Adult v  
 Gender: Unknown v  
 Title: Miss  
 Forename: Karen  
 Surname: Booking \*
 Date of Birth: v  
 Nationality: British v  
 Language: English v  
 Company Account: Search Remove

**Address**

Street: Shrewsbury Business Park \*  
 District: Sitka Drive  
 Town / City: Shrewsbury \*  
 County State: Shropshire  
 Country: United Kingdom v  
 Post / Zip Code: SY2 6LG \* Search

**Contact**

Telephone Number: 01234567810 \*  
 Fax Number: \_\_\_\_\_  
 Mobile Number: \_\_\_\_\_  
 Email Address: karen.booking@guestline.com x

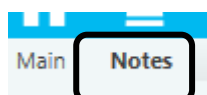
Information with a \* is a mandatory field and must be completed before saving.

- Title
- Surname
- Address – Post Code Search (enter code select search to pre populate address)
- Contact Telephone Number

Email is optional but always ask as confirmations are sent via email and for marketing purposes.

Click **Save**

4. Click on the **Notes** tab to add notes onto the enquiry. Notes will copy when converted.



5. Click **Save**.

Assigned To	Guestline 2
Chase Date	19/09/2016
Contact Method	Other

- **Assigned To** – automated to the person creating the Enquiry
- **Chase Date** - 3 days after creation
- **Contact Method** – How the guest would like to be contacted

### Converting an Enquiry Straight Away

1. From the **Option** click the **convert** button  
This will take you through to the CRS reservation screen

Option 1	
Pick No	Site
1	LSET-NORTH
<b>Convert</b>	Add Quote

Option 2

2. Click **Edit** to edit the contact details if required or **Unlink** to amend to another profile.

Contact
Miss Karen Booking Shrewsbury Business Park Tel: 01234567810 Sitka Drive Email: karen.booking@guestline.com Shrewsbury Shropshire United Kingdom SY2 6LG
<b>Edit</b> <b>UnLink</b>

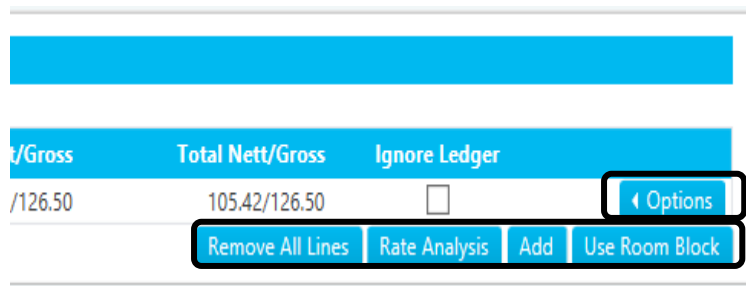
3. Click **Search** to enter a company or agent profile to the booking.

Company	<b>Search</b>
Agent	<b>Search</b>

4. From the **Rooming List** tab details can be edited if the person staying differs from the contact. Enter the surname, click **options**, **link**, select profile, if no profile, add a new profile.

Rate Plan	Rooming List	Profile Data	Upsells	Misc.	Policies & Payment
Total Cost - 140.00					
1. Room: 2EB 16/Sep/2016 - 18/Sep/2016 140.00					
			*	<b>Options</b>	ETA <input type="checkbox"/> ETD <input type="checkbox"/>
				<b>Options</b>	ETA <input type="checkbox"/> ETD <input type="checkbox"/>
PAX Limit Reached					
<b>Add Pax</b>					

5. From the **Room & Rate** tab, details of the reservation can be amended.



- **Options** to 'change' the room, rate or dates selected, Override which lets you overtype the rate per night
- **Remove All Line** to completely and add a new room, date & rate
- **Rate Analysis** to see the rate per night
- **Add** to add a change, room rate or room type
- **Use Room Block** to link the booking to an existing Room Block/Allocation of rooms



- **Add Room** to go back to rate plan search and add another room to this segment
- **Back** takes you to the previous screen with no save
- **Close** goes to previous screen and saves
- **Save** stays on same screen and saves booking/where you are up to

6. From the **Upsells** tab you can add extra's to the room. If you have more than one room on the segment you can select which room you wish to add the extra's onto.

Product	Description	Value	Charge Mode	Posting Mode			Add
				DOA	RD	DOD	
AFTERNOON_T	Afternoon tea	8.50	Per Person	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add
BABYCOT	BABY COT	0.00	Single Charge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add
BFAST_OVAT_S	Breakfast Student Non Vatable	0.00	Per Person	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add
BFAST_VAT_S	Breakfast Student Vatable	0.00	Per Person	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add
CARPARKING	CAR PARKING	0.00	Single Charge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add
CHOC_FNT	Chocolate Fountain	50.00	Single Charge	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Add
CRF_15	£15 common room fee	15.00	Per Room	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Add
DINNER_STU	Dinner Student	20.00	Single Charge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add
MASSAGE	Massage Charge	20.00	Single Charge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add

7. From the **Misc.** tab you can amend the following:

- Purchase Order      Allow Room Moves      Alarm Call
- Credit Limit        Media Source            Exclude from Template Automation

Notes can also be added to each segment within the booking.

8. From the **Policies & Payment** tab, the following can be amended:

Rate Plan	Rooming List	Profile Data	Upsells
<b>Booking Status</b>	Confirmed		*
Total For Stay	140.00		
Deposit Received	0.00		
Deposit Outstanding	0.00		
Remaining Balance	140.00		
<b>Guarantee Type</b>	Credit Card		*

- Booking Status** – Provisional or Confirmed
- Guarantee Type** – credit card, ledger or both

## Taking Payment via Secure Trading

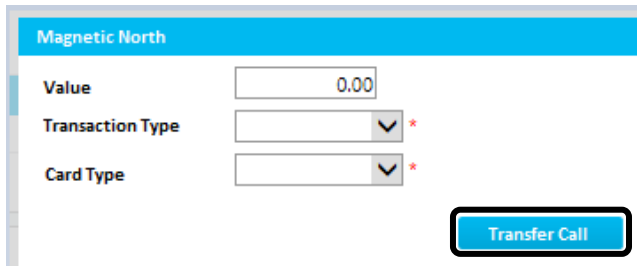
Deposits/Payments must be taken via Secure Trading if the guest is not present.

Payment **MUST** be taken before saving the reservation.



The screenshot shows a payment interface with a blue header. On the left, there are three buttons: "Guarantee Only", "Take Payment Of", and "Magnetic North". The "Magnetic North" button is highlighted with a black border. To the right of these buttons is a text input field containing "0.00". Below the buttons, there is a blue bar with the text "Token" on the left and "Order Ref" on the right.

1. Click the **Magnetic North** button and this will start the payment process



The screenshot shows a "Magnetic North" payment form. It has a blue header with the text "Magnetic North". Below the header, there are three fields: "Value" with a text input field containing "0.00", "Transaction Type" with a dropdown menu, and "Card Type" with a dropdown menu. Both dropdown menus have a red asterisk next to them. At the bottom right of the form is a blue button labeled "Transfer Call".

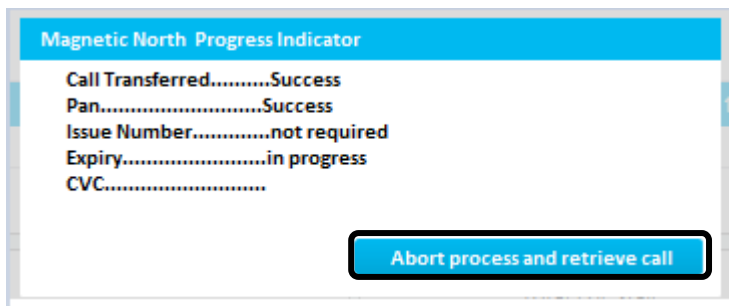
- **Value** – Payment Due
- **Transaction Type** – Guarantee or Take Payment
- **Card Type** – the make of the card being used for payment

2. From entering the details state to the guest they will be transferred to a secure line to give their card details to complete the payment process.

3. Click **Transfer Call**

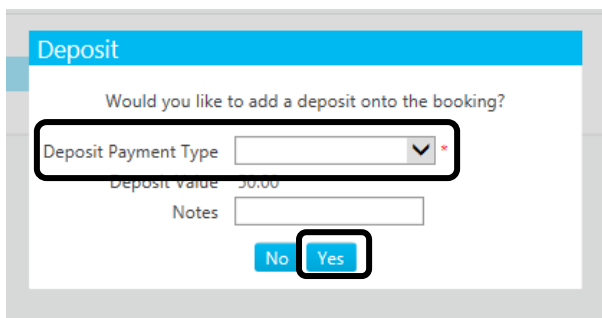
A progress box will appear letting you know the stages of the information being taken.

4. Click **Abort process and retrieve call** to bring the customer back.



The screenshot shows a "Magnetic North Progress Indicator" window. It has a blue header with the text "Magnetic North Progress Indicator". Below the header, there is a list of status indicators: "Call Transferred.....Success", "Pan.....Success", "Issue Number.....not required", "Expiry.....in progress", and "CVC.....". At the bottom right of the window is a blue button labeled "Abort process and retrieve call".

5. From ending the Magnetic North process, a **Deposit** pop up will appear



The screenshot shows a "Deposit" pop-up window. It has a blue header with the text "Deposit". Below the header, there is a question: "Would you like to add a deposit onto the booking?". Below the question, there are three fields: "Deposit Payment Type" with a dropdown menu, "Deposit value" with a text input field containing "50.00", and "Notes" with a text input field. At the bottom of the window are two buttons: "No" and "Yes".

6. **Deposit Payment Type** - PCI\_Property as the money has been processed at property level
7. Click **Yes**



From completing the process, a PCIlynx Ref number is generating that stores all the details regarding the transaction behind. This can be used later to Re-Auth for more monies or Refund the money.

**Ledger**

Ledger

---

**Secure Trading**

PCIlynx Ref 4-9-2769276

8. Click **Save** on the booking and an **Invoicing** tab appears on the segment of the booking.

## Invoicing Set Up

Segment 1 - BK00195 +

Rate Plan Rooming List Profile Data Upsells Misc. Policies & Payment Invoicing To Do's

---

**Invoicing**

Reservation Total 141.50

Transaction Plans  ▼

This segment is where you will set the plans, accounts and create accounts. You will also see a Reservations Total.

See **CIM Invoicing** to complete this process.

## Converting an Enquiry Not Straight Away

If the customer calls back later to proceed with the enquiry, please follow the below steps.

1. Click on the **CRS Module** icon (organisational chart).
2. From **reservations** click on **Enquiries**.
3. This will take you through to the enquiry section.
4. Search by the Parameters for the enquiry.
5. Click on the **Enquiry Ref number**.

The screenshot shows the 'Enquiries Search Parameters' form with various filters and a table of results. The 'Enquiry Ref' field in the table is highlighted with a red box.

Enquiry Ref	Name	Email	Created Date
EN000024	Booking, T Mr		08/Sep/2016
EN000026	Booking, K Miss	karen.booking@guestline.com	16/Sep/2016

6. If there is no availability left for that option type, exit the current screen to go back to the Enquiry page. Under that option on the right hand side, click the **options** button and change. Enter the same criteria and click **Total Cost**. Explain to the guests and give other options available.

7. Follow the process from clicking the **convert** button as listed previously.

The screenshot shows two options for an enquiry. Option 1 is 'Converted' and Option 2 is 'Not Converted'. Option 2 is highlighted with a red box.

Pick No	Site	Arrival
1	LSEBAT	08/Sep/2016

Pick No	Site	Arrival
1	LSEBAT	08/Sep/2016

If you have more than one option under the same enquiry, clicking **convert** on one make the others automatically set to **not converted**.

The screenshot shows the 'Options' screen with a 'Close' button highlighted by a red box. Other buttons include 'Add Additional Option', 'Options', 'Templates', 'Back', 'Close', and 'Save'.

8. If the customer does not want to proceed, click the **Options** button and click **Close** to close an enquiry.

Enquiry Close

Code  Description

Reason

Close Save

9. The **Enquiry Close** box will appear on the screen. The following must be completed before clicking Save:

- Code
- Description
- Reason

10. Click **Save**.

## Sending a Confirmation

### Enquiry

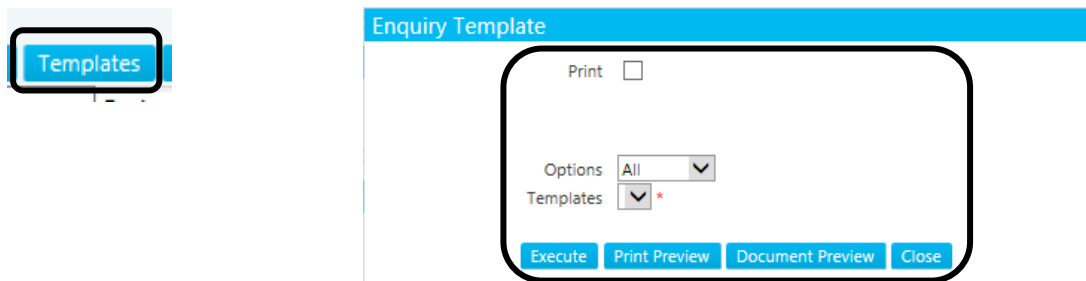
1. Click the **Template** button.

The **Enquiry Template** box will appear. Complete the following:

- Print - Tick the box
- Options - Select the option you wish to print
- Template - choose your template

2. Click **Execute**.

You can also print view and document view should you wish to edit further.



### Converted

1. From the CRS header tabs on the reservation, select the **Confirmation** tab.



2. Tick which confirmation or tick the top box to select all confirmations to send.

Batch Print	Print	Email	Fax	SMS	CRSBookRef	BookRef	Guest Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Summary	Summary	Booking, Test
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CRS00139/1	Summary	Booking, Mr Test Booking
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CRS00139/1	BK00209/1	Booking, T

**CRSBookRef Summary** – Summary of all rooms booked on the different segments.

**CRSBookRef – CRS00139/1 BookRef – Summary** Booking Summary just for that segment

Under the top two each individual reservation can be sent its own confirmation.

3. Choose the correct template from the **Template** dropdown.
4. Click **Execute** – to send confirmation from Rezlynx
5. Click **Confirm To Property** - confirmation of the booking to the property you are booking on behalf

The screenshot shows a software interface with a table and several buttons. The table has a header row labeled 'Template' in a blue bar. Below the header, there are six rows, each with a dropdown menu containing 'BOOKING\_CONFIRMATION' and a downward arrow. To the right of each dropdown is a 'Print Preview' button, and further right is a 'Document Preview' button. Above the table, in the top right corner, is a 'Confirm To Property' button. Below the table, in the bottom right corner, is an 'Execute' button. All these buttons are highlighted with black rectangular boxes.

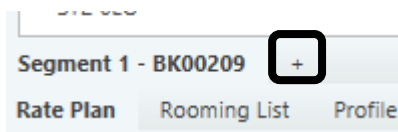
Template		
BOOKING_CONFIRMATION ▼	Print Preview	Document Preview
BOOKING_CONFIRMATION ▼	Print Preview	Document Preview
BOOKING_CONFIRMATION ▼	Print Preview	Document Preview
BOOKING_CONFIRMATION ▼	Print Preview	Document Preview
BOOKING_CONFIRMATION ▼	Print Preview	Document Preview
BOOKING_CONFIRMATION ▼	Print Preview	Document Preview

## Segments

### Adding a New Segment

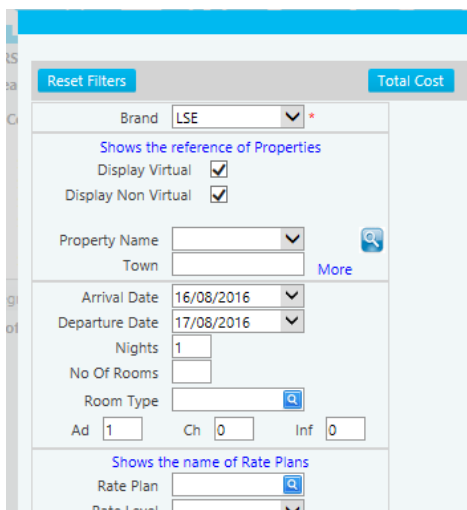
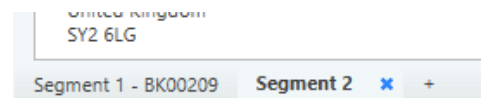
To add a new segment onto an existing booking:

1. Click on the **CRS Module** icon (organisational chart)
2. From **reservations** click on **Search**.
3. This will take you through to the reservation search
4. Search by the parameters
5. Click on the **CRSBookRef**



6. Once you are in the reservation click on the **+** beside the existing segment

This creates i.e. Segment 2 depending on the number of segments already created on the CRS reservation



Reset Filters Total Cost

Brand LSE \*

Shows the reference of Properties

Display Virtual

Display Non Virtual

Property Name

Town  More

Arrival Date 16/08/2016

Departure Date 17/08/2016

Nights 1

No Of Rooms

Room Type

Ad 1 Ch 0 Inf 0

Shows the name of Rate Plans

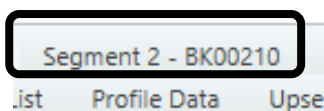
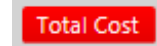
Rate Plan

Rate Level

Once the **+** has been selected and Segment 2 appears it will redirect automatically to the rate search page.

The booking information i.e. stay dates, nights, number of people, will have to be inputted again.

7. Once changes have been made the **Total Cost** button will change to red.
8. Select the button to add the segment onto the reservation.



This creates a new booking number (BK) for the segment but it is still a part of the original CRS booking reference number.

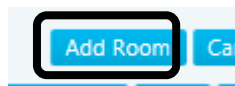
Change the name if it differs as it will pull through the contact name onto the rooming list.

Just like the segment before remember to complete the following:

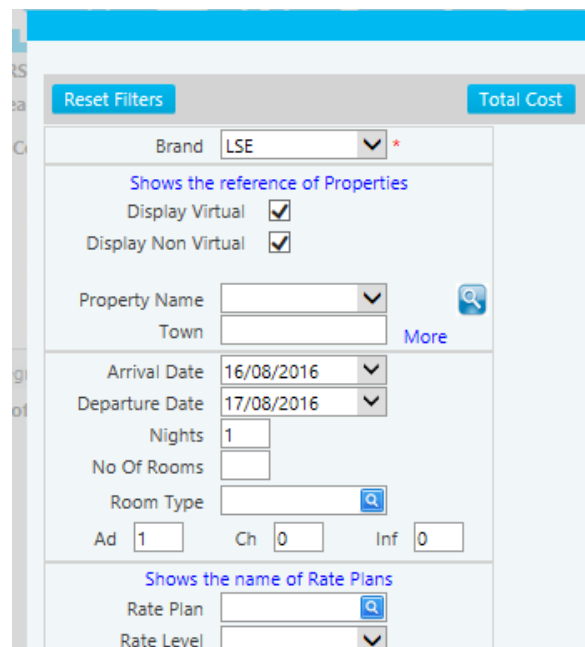
- Market Segment
- Guarantee Type
- Booking Notes
- Payment if required

### Adding a room onto a segment

1. Click **Add Room** to add a room onto an existing segment.



You will now see the rate search screen.

A screenshot of a rate search interface. At the top, there are two buttons: 'Reset Filters' and 'Total Cost'. Below these, the 'Brand' is set to 'LSE'. A section titled 'Shows the reference of Properties' contains checkboxes for 'Display Virtual' and 'Display Non Virtual', both of which are checked. There are input fields for 'Property Name' and 'Town', with a 'More' link next to the 'Town' field. The 'Arrival Date' is '16/08/2016' and the 'Departure Date' is '17/08/2016'. Other fields include 'Nights' (1), 'No Of Rooms', 'Room Type', and 'Ad' (1), 'Ch' (0), 'Inf' (0). A section titled 'Shows the name of Rate Plans' has input fields for 'Rate Plan' and 'Rate Level'.

2. The booking information i.e. stay dates, nights, number of people, will have to be inputted again.
3. Click **Total Cost** once the relevant fields have been inputted.

Change the name if it differs as it will pull through the contact name onto the rooming list.

Just like the segment before remember to complete the following:

- Market Segment
- Guarantee Type
- Booking Notes
- Payment if required

This booking will have the same booking reference number (BK) but will have /2 at the end depending on the number of the room added.

### Mid Stay Changes (Booking Lines)

Hide Rate On Reg Card

1st Night Nett/Gross	Total Nett/Gross	Ignore Ledger	
91.66/110.00	91.66/110.00	<input type="checkbox"/>	Options

[Allocate](#)
[Remove All Lines](#)
[Rate Analysis](#)
[Add](#)
[Use Room Block](#)

1. Click **Add** to add a booking line
2. Select the different rate plan or a different room type and room id.

You can have as many booking lines as you wish.

\*Please note that the booking line will add a night, if you wish to amend a booking line a warning message will populate.

#### Booking Line Warnings

The following booking lines will be **modified** or removed as a result of this change.

ID	From	Nights	To	Ad	Ch	Inf	Market Segment	Rate Plan	Room Type	Room ID	Total Nett/Gross
1	08/Aug/2016	1	09/Aug/2016	2	0	0	PRIVATE	RACK_RO	DOUBLE	1	91.66/110.00

[Abort](#)
[Continue](#)

Hide Rate On Reg Card

1st Night Nett/Gross	Total Nett/Gross	Ignore Ledger	
91.66/110.00	91.66/110.00	<input type="checkbox"/>	Options
116.66/140.00	116.66/140.00	<input type="checkbox"/>	Options

[Un-allocate](#)
[Remove All Lines](#)
[Rate Analysis](#)
[Add](#)
[Use Room Block](#)

3. Click **Rate Analysis** to see if this has applied correctly and click **Close**.

#### Daily Rate Analysis

Product Code	08/Aug/2016	09/Aug/2016	10/Aug/2016	Totals
Rate Plan	RACK_RO	RACK_RO		0.00
Promo Code				0.00
Accommodation	110.00	140.00		250.00
<b>Totals</b>	<b>110.00</b>	<b>140.00</b>	<b>0.00</b>	<b>250.00</b>

[Close](#)



## Cross Property Booking Transfers



1. Click on the **Guest Journey** icon (bell)
2. From **reservations** click on **Search**.
3. Search for the reservation needing to transfer to another property.

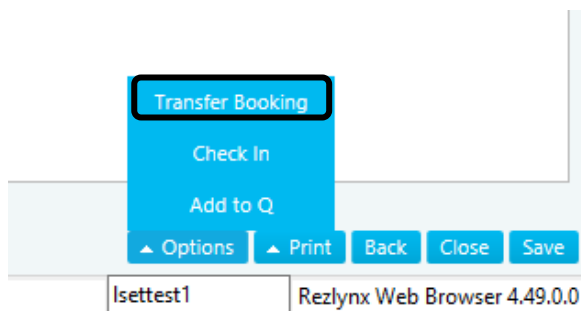
To transfer the reservation must not have the following status':

- Waitlist
- Resident
- Cancelled
- No Show
- Checked out

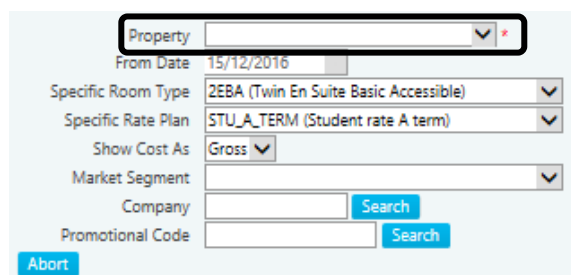
Roomlynx OTA/GDS created reservations will have restraints on the ability to be transferred based on a channel by channel basis. Rezlynx will deal with this by either permitting or restricting property transfer

If a booking is part of a group/multi-room when transferred it will be created as an individual booking on the destination site

4. Within the reservation from the **Options** button, click the **Transfer Booking**.



5. Select the **Property** drop down box to select the new property to transfer the booking.



Property [dropdown]  
From Date 15/12/2016  
Specific Room Type 2EBA (Twin En Suite Basic Accessible)  
Specific Rate Plan STU\_A\_TERM (Student rate A term)  
Show Cost As Gross  
Market Segment [dropdown]  
Company [input] Search  
Promotional Code [input] Search  
Abort

- Once you have selected the Property, Click Rate Plan Search. This will return results for this property.

Property: TRAINING Butlers Wharf \*  
 From Date: 15/12/2016  
 Specific Room Type: [Dropdown]  
 Specific Rate Plan: STU\_A\_TERM (Student rate A term)  
 Show Cost As: Gross  
 Market Segment: [Dropdown]  
 Company: [Text] Search  
 Promotional Code: [Text] Search  
 Nights: 2  
 Adults: 2  
 Children: 0  
 Infants: 0  
 Hide When Restricted By  
 Only Show Rate Plans Spe

	1CB	DCB	G2CB	WFKD	X1CB
Availability	256	1	11	2	22
STU_A_TERM	39.12	39.12	39.12	39.12	39.12

- Select the new **Room Type** to transfer the booking to that property.
- From clicking on the new room type, it will direct you to the **transfer screen**.

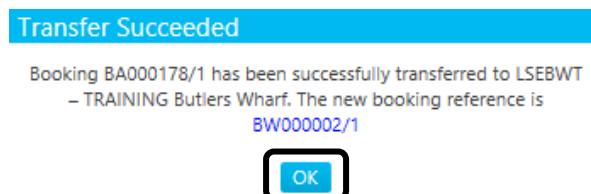
Source Site [LSEBAT-TRAINING Bankside House]  
 Booking Information  
 Status: Confirmed  
 Guarantee Type: Credit Card  
 Media Source: TELEPHONE (Teleph)

Destination Site [LSEBWT-TRAINING Butlers Wharf]  
 Booking Information  
 Status: Confirmed  
 Guarantee Type: Credit Card \*  
 Media Source: TELEPHONE (Teleph) \*

- The booking information from the property you are transferring from will default into the property you are transferring to.
- Click on the **Transfer** button at the bottom right of the box.



- A pop up box will appear stating the booking transfer was successful. Click **Ok**.



- From clicking ok, at the bottom left of the booking it will state the new booking reference for the new property.

Booking Ref: BA000178/1 Transferred to: LSEBWT - BW000002/1  
 Created by SYSTEM\_USER2 on the 15/Dec/2016 at 11:08  
 Edited by SYSTEM\_USER2 on the 15/Dec/2016 at 11:26

## Canceling a Reservation

### Cancel in full – received no payment and there are no charges

1. Cancel the booking from Rezlynx
2. If the invoice has been generated, the system will credit this automatically once it has been cancelled. Send the credit note to the booker.

### Cancel in full – no payment received with charges to apply – Individual booking

1. Search for the booking via the CRS Module icon, **Reservations** and **Search**. Select the correct booking.
2. Take the payment via Secure Trading under the **Policies & Payment** tab within the segment.
3. Click **Cancel Reservation**, select the booking you wish to cancel and against the booking there should be a **Deposit** button. Click the **Deposit** button.

Deposit	Cancellation Code	Cancellation Notes
-50.00	<input type="text"/>	<input type="text"/>

**Deposit**

4. As the booking has been charged for cancelling, select the **Refund Payment Code** as the same that the payment was originally taken by. Select your **Analysis Code** as 'No Show Fees', enter your **Retained Comment** and select either the **Percentage or Value** that is being retained and the amount will now jump to **Total to Retain**. Click **OK**.

Refund Deposit For BK00211/1

Deposit Date	Payment Code	Deposit Gross Amount
18/Aug/2016	SECURE_CARD	50.00
Totals		50.00

Refund Payment Code  \*  
Analysis Code   
Refunded Comment   
Retained Comment   
Percentage to Retain  OR Value to Retain   
Total to Retain 0.00  
Total to Refund 50.00

Please note: that unless the booking is cancelled entirely, the deposit will not be refunded

**Abort** **OK**

5. Vice Versa if the payment had been taken at the time of booking and you wished to refund it simple enter the **Refund Comment** and select the **Percentage or Value** of the refund you wish to make.

## **CIM Invoicing \*\*\*STUDENT BOOKINGS ONLY\*\*\***

### **CIM Terminology**

#### ***CIM – Central Invoicing Module***

This is the programme associated with Rezlynx and CRS (Central Reservations System) which allows for the creation and generation of invoices from within a reservation at any point prior to arrival.

#### ***Transaction Plan***

A transaction plan determines how the charges to a reservation are to split over the invoice. For Example, Accommodation to One Account and Extras to Another.

#### ***Payment Plan***

A payment plan determines how the invoices are created. For Example, one invoice for the total stay from the arrival date, or an Invoice every 30 days starting from today.

#### ***Account***

The Account is the Company or Person who is responsible for paying the invoice for the stay.

**Also the payment due days are defined within an account, i.e. Zoe Harney pays 14 days in arrears**

NB: The account reference and detail should always be linked to a Personal Profile.

#### ***Invoice***

The document indicating the charges raised for the stay in a description one line format. NB: This does have a tax breakdown.

#### ***Credit Note***

The document highlighting any credits to the invoice/account.

For example, when a stay is reduced a credit note will credit to the original invoice raised. NB. A new invoice would already have been raised in this case

#### ***Create Invoice Set***

This will create the invoices in preparation for when they need to be sent out. They will be in a 'Pro-Forma' state at this stage.

#### ***Generate Invoice***

This will generate the invoice into an official document. NB: You can only generate invoices after creating the invoice.

#### ***Take Payment***

Taking Payment directly against an invoice. This will then appear on that person Central Account.

### ***Pro-forma***

The document highlighting the proposed charges on the invoice. NB: this does not have a tax breakdown.

### ***Unallocated Payments***

Payment's that have been received but not allocated to an invoice.

### ***Debtors***

The list of Accounts that have invoices outstanding for payment.

### ***Cancel Invoicing***

This will completely remove and / or credit all invoicing, transaction plans and accounts from a booking. You will need to add back in after to correct set up.

## **How does the invoicing process work with CIM**

Rezlynx functionality which is called CIM (Central Invoicing Module) allows for booking information to be directly entered on to an invoice from the Rezlynx browser. This allows Reservation and Front Desk teams to quickly send a full VAT invoice at any time prior to or on receipt of payment.

Rezlynx decides what information to put on an invoice based on the following steps which are loaded at the time of booking, or later once details are confirmed: -

**Transaction Plan** – this determines how many *payment accounts* will be added to a booking and what charges those accounts will pay. PLEASE NOTE once this is set it cannot be changed.

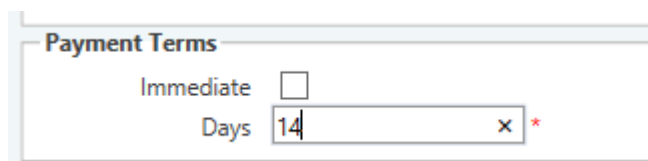
### ***Account***

The Account is the Company or Person who is responsible for paying the invoice for the stay.

**Also the payment due days are defined within an account, i.e. Zoe Harney pays 14 days in arrears**

NB: The account reference and detail should always be linked to a Personal Profile.

**Payment Plan** – various ways a person can pay either up front at time of booking or on an agreed credit agreement. These will be pre-set based on the **account profile** e.g. a student account should always have the 'immediate' unticked in their account, and then the number of days in arrears of invoice they required to pay by in the box. i.e. 14.



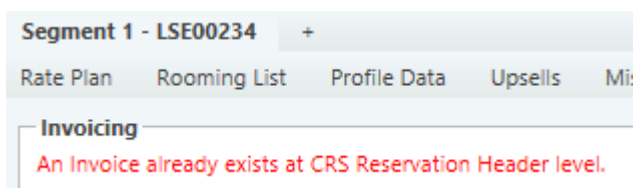
The screenshot shows a form titled "Payment Terms". It contains two fields: "Immediate" with an unchecked checkbox, and "Days" with a text input field containing the number "14". The "Days" field has a small "x" icon and an asterisk "\*" to its right, indicating it is a required field.

## Header Vs Segment Invoicing

**Header** – When invoicing from the header, it applies to all segments within that CRS reservation. If you have different properties or rooms booked within the segments under that CRS reservation it will not allow you to unselect for certain segments.

**Segment** – When invoicing from the segment it only applies to rooms booked under that particular segment. Each segment under one CRS reservation can have different invoicing methods applied.

If you have set the transaction plan via the Invoicing tab in the Header and try to change in the segment it will not allow you and state an invoice already exists. (This will also apply to creating at segment level)



Once you have selected your invoice level and confirm it, if an error has occurred where you have selected the wrong transaction plan or it changes, then you will need to cancel invoicing and start again.

## Transaction plan use in bookings

When coming to the Invoicing tab, the first task to set is the invoice Transaction Plan.

The Transaction Plan determines how many payment accounts will be added to the booking, and what charges those payment accounts will be invoiced for.

Each plan should be designed to be self-explanatory for quick reference.

Some example transaction plans are:

**All charges to one account** – All charges on the booking can be assigned to one payment account. Useful for consumer stay bookings, or direct corporate bookings. This is only used if one person/company is paying for accommodation and any upsells on the booking.

**2 Accounts; Acc1=Accom; Acc2=Upsells** - This will split charges between 2 accounts. The first profile will take the accommodation charges; the second profile will take any other upsells. This is suitable for corporate and agent bookings where the booker is paying for accommodation only and the guest settles the upsells.

**3 accounts. Account 1 = accommodation; account 2 = 50% upsells; account 3 = 50% upsells** – This will split the charges between 3 payment accounts. The first payment account will accept the accommodation charges only, and any upsells will be split 50/50 between accounts 2 and 3. This is useful for a shared two bed booking, where the accommodation is being paid by their corporate booker or agent and the guests are sharing the cost of the upsells.

You can set a preferred transaction plan within their payment account profile.

**NB. It is crucial your client confirms how they wish to pay prior to the transaction plan being set.**

### Personal Payment Accounts

1. Select the **Transaction Plan** that applies to this booking. Click **Confirm**.

The screenshot shows the 'Invoicing' tab selected. Under 'Reservation Total', the amount is 1183.00. The 'Transaction Plans' dropdown menu is open, displaying 'Accommodation Account 1, Extras Account 2'. A 'Confirm' button is located below the dropdown and is highlighted with a red box.

2. **Search** for the Account for each section of your Transaction Plan if selected. Two types of Payment Accounts can be attached: Personal Account and Company Account.

The screenshot displays two account selection sections. 'Account 1' and 'Account 2' each have an 'Account Ref' input field and a 'Search' button. The 'Search' buttons are highlighted with red boxes. At the bottom, there is a 'Create Invoice Set' button.

3. If there are no accounts found, click on **Show Relevant Accounts** just to double check.
4. If the account does not exist create a new account by clicking on **Add New Account** button.

The screenshot shows the account search interface. It includes an 'Add New Account' button, a 'Smart Search' input field, and 'Advanced Account Search Parameters'. The 'Reset Filters' button is on the left, and the 'Search' and 'Show Relevant Accounts' buttons are on the right. The 'Show Relevant Accounts' button is highlighted with a red box.

- Any relevant profiles linked to the booking will now pop up - Select the **P** profile you are looking for and click **Create**.

Accounts Ref

Please select one of the following profiles as the basis for the new Account or create from a blank template.

Reference	Name	Street	PostCode	Email
PF000067	Ms Jenny Last	2 Balmes Road	N1 5TQ	

Abort Create new account

**Create**

- This will bring up the account create screen. The **payment account** profile is linked to the selected **P** profile, and has the same reference.
- Add the guest's First name in the Name field (Surname is automatically populated). This helps ensure the payment account is assigned to specific profile and easier to locate.

Details Notes Payment Plans

Account

Ref PF000080 \*

Name Fisher

Linked To PF000080 (Miss Karen Fisher) \* [Profile Search](#) [Company Search](#) [Remove](#)

Address

Use Linked Profile Address  
 Use Custom Address

Street Shrewsbury Business Park

Area / District Sitka Drive

Town / City Shrewsbury

County / State Shropshire

Country / Province United Kingdom

Post / Zip Code SY2 6LG [Search](#)

Account Registration Number

Contact

Telephone Number 01234567810

Fax Number 1

Fax Number 2

Email Address karen.fisher@guestline.com \*

Attributes

Account type

Payment Terms

Immediate

Days 14 \*



- The account will automatically default to **Immediate** payment terms, you will need to untick and change this. See above.

NB. you can add notes specific to their account in the **'Notes'** Tab – You can also add extra Payment Plans that are agreed for this account in the **'Payment Plans'** Tab.

- Select **Save Changes** on profile.

- Proceed to complete invoicing tab. NB. To Add Extra Payment & Transaction Plans

### Company Payment Accounts

- If there are no accounts found, click on **Show Relevant Accounts** just to double check.
- If the account does not exist create a new account by clicking on **Add New Account** button.
- Any relevant accounts to the booking will now pop up. Select the **C** profile you are looking for and click **Create**.

NB. If your **C** profile does not exist or does exist but needs to be sent to a new address, you would need to create a new company profile (follow "Guest Journey - Profiles – Company Search, Create").

**Accounts Ref**

Please select one of the following profiles as the basis for the new Account or create from a blank template.

Reference	Name	Street	PostCode	Email	
PF000080	Miss Karen Fisher	Shrewsbury Business Park	SY2 6LG	karen.fisher@guestline.com	<a href="#" style="background-color: #00a0e3; color: white; padding: 2px 5px;">Create</a>
PF000080	Miss Karen Fisher	Shrewsbury Business Park	SY2 6LG	karen.fisher@guestline.com	<a href="#" style="background-color: #00a0e3; color: white; padding: 2px 5px;">Create</a>
PF000080	Miss Karen Fisher	Shrewsbury Business Park	SY2 6LG	karen.fisher@guestline.com	<a href="#" style="background-color: #00a0e3; color: white; padding: 2px 5px;">Create</a>
GIANTGROUP	Giant Group	20 Kings Road	WC2		<a href="#" style="background-color: #00a0e3; color: white; padding: 2px 5px;">Create</a>

[Abort](#)
[Create new account](#)

- This will bring up the account create screen. The payment account profile is linked to the selected **'C'** profile, and has the same reference.
  - The account will automatically default to **'Immediate'** payment terms, you will need to untick and change this.
- You can add notes specific to their account in the **Notes** Tab – You can also add extra Payment Plans that are agreed for this account in the **Payment Plans** Tab.
- Select **Save Changes** on profile.
- Proceed to complete invoicing tab. NB. To Add Extra Payment & Transaction Plans

## Payment Plan Use

When selecting the payment account, you will only see applicable payment plans for that profile (see previous). Please find some examples of payment plans and their explanations:

**Payment in full – no credit:** This will apply to most 'P' accounts (i.e. a person paying for the booking) and to some 'C' accounts (i.e. a company with no credit agreement). Payment is required at the time of booking in full by credit/debit card or BACS transfer, if there is sufficient time. See Reservations SSP on Provisional bookings.

**Payment in Full 14 Days after Check in:** This may apply to 'P' or 'C' Accounts where they pay a deposit and then pay in full 14 days in arrears of Check IN. Payment Date can be set manually when generating the invoice.

**Monthly invoice in Advance - choose 1st of month of arrival:** This could apply to a 'C' account where their credit agreement states the invoice must be sent on the 1<sup>st</sup> of the arrival month. When creating the invoice set the First Invoice Date to the 1<sup>st</sup> of the month of arrival, for the correct invoice schedule to be created.

**Monthly Invoice in Arrears - choose 1st of month following arrival:** This will apply to a 'C' account where their credit agreement states the invoice must be sent on the 1<sup>st</sup> of the month after arrival. When creating the invoice set the First Invoice Date to the 1<sup>st</sup> of the month after arrival, for the correct invoice schedule to be created.

**Payment on departure** – This could apply to specific 'P' or 'C' accounts where you have agreed to take payment on departure.

## Amending Details for a Guest Payment Account

If a guest has a profile which is missing details, we must attempt to get this information at every possible opportunity. This will update in two locations:

- The guest's contact profile i.e. their 'P' Profile Record
- The guest's payment account i.e. their payment ledger

By following both of these steps you will ensure that the:

- Profile record for the guest is updated
- The payment ledger for the guest will be updated for future invoices

1. From the booking for the guest you are amending, click **Edit** next to the contact in the Header.

CRS Booking Ref: CRS00162 +

Header Invoicing Profile History Summary Confirmation Log To Do's Broch

**Contact**

Mr Paul Thomas  
Houghton Street Tel: 02071061306  
London Email: [p.thomas@lse.ac.uk](mailto:p.thomas@lse.ac.uk)  
United Kingdom  
WC2A 2AE

Edit JnLink

Segment 1 - BA000177 +

2. On the Profile screen, enter relevant information and click **Save Changes**.
3. To amend the Account, go to the **Invoicing** tab and click **Edit** on right hand side aligned with the Account Ref.

Invoice Reprint Unallocated Payments Edit

View

4. On the Account Edit screen, enter the details you wish to update in the equivalent fields, and click **Save Changes** e.g. An example of an alternate address being added.

**Details** Notes Payment Plans

**Account**

Ref PF000184 \*

Name Clinton

Linked To PF000184 (Hillary Clinton) \* Company Search

**Address**

Use Linked Profile Address

Use Custom Address

Street White House 2

Area / District Washington

Town / City Washington

County / State

Country / Province United States

Post / Zip Code V69 OMG Search

## Creating Invoices

1. Click on **Create Invoice Set** button.

The screenshot shows a form for 'Account 1'. It includes fields for 'Account Ref' (PF000184), 'Payment Plan' (Clinton), and buttons for 'Search' and 'Edit'. A 'Create Invoice Set' button is highlighted with a black box.

This will populate the information for the invoice. The **Amount** column displays the total cost of this invoice.

The **Balance** column shows the total to be paid on the invoice.

Amount	Balance
100.00	100.00

[Generate Invoice](#)

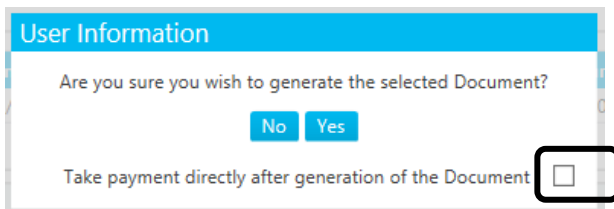
2. Click **View** to view pro-forma prior to generating the invoice to CHECK if all the details are accurate. See image below.

3. Click on **Generate Invoice**.

The screenshot shows a table with columns 'Amount' and 'Balance'. A row contains '100.00' and '2031.00'. A 'Generate Invoice' button is highlighted. A dropdown menu is open, showing options: 'Direct Print', 'Silverlight', 'Flash', 'PDF', 'Html', 'RTF', and 'Email'. The 'View' button in the dropdown is also highlighted.

- An information pop up box will appear.
- If you **are** taking payment at this point, ensure the “Take payment directly after generation of the Document” box is **ticked** prior to selecting **Yes**.

If you are **not** taking payment at this point, ensure the “Take payment directly after generation of the Document” box is **not ticked** prior to selecting **Yes** (default).



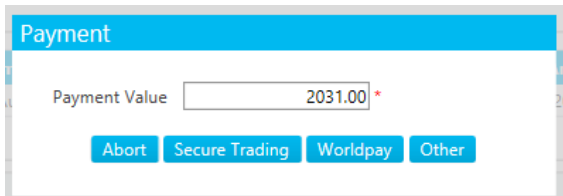
User Information

Are you sure you wish to generate the selected Document?

No Yes

Take payment directly after generation of the Document

- If you wish to take payment via Secure Trading, click on the relevant button which will take you directly to the right page to take payment.

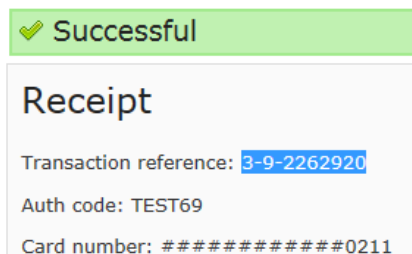


Payment

Payment Value  \*

Abort Secure Trading Worldpay Other

Once payment has been authorised, the Transaction (PCILynx) Reference must be copied from the pop up and pasted in to the Private notes within the booking.



✓ Successful

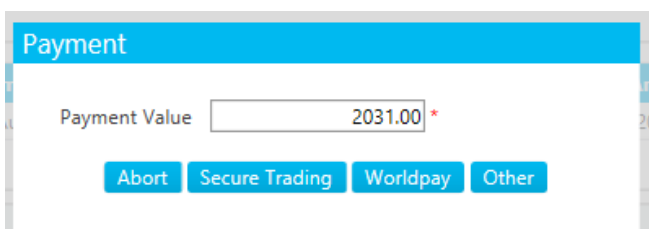
Receipt

Transaction reference: 3-9-2262920

Auth code: TEST69

Card number: #####0211

- If the payment is not taken via online source, click **Other** and select relevant payment type.



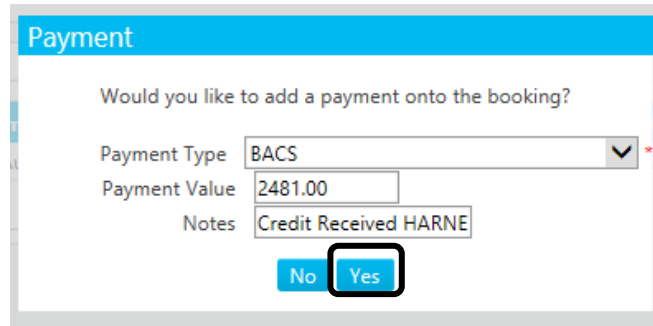
Payment

Payment Value  \*

Abort Secure Trading Worldpay Other

8. Once you have taken the payment or selected Other the following box will appear, select your payment type from the drop down box and click on **Yes**.

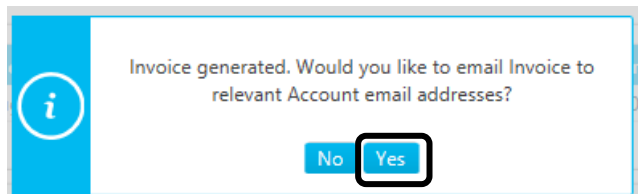
Select the Payment Type based on the method of payment used and the type of card used to pay – if applicable.



:

9. You will then see the following window. Click **Yes** to email invoice immediately to the payment account email address.

If you require a hard copy of the invoice, select No to the above



The invoice will now show a zero balance as it has been paid.

Invoice Number	Payment Due Date	Amount	Balance
CINV00000134	03/Aug/2016	2581.00	0.00 <a href="#">View</a>

10. Move to the **Policies and Payments** tab, change the Booking Status to **Confirmed** if not done so already and make sure you click **Save**.

**Please note that the remaining balance on the policies and payments tab should be ignored as this is not relevant. Unless this person is a VACATION/COMMERCIAL stay – where you will not complete any Invoicing and you will refer to Room Billing under the PMS section.**

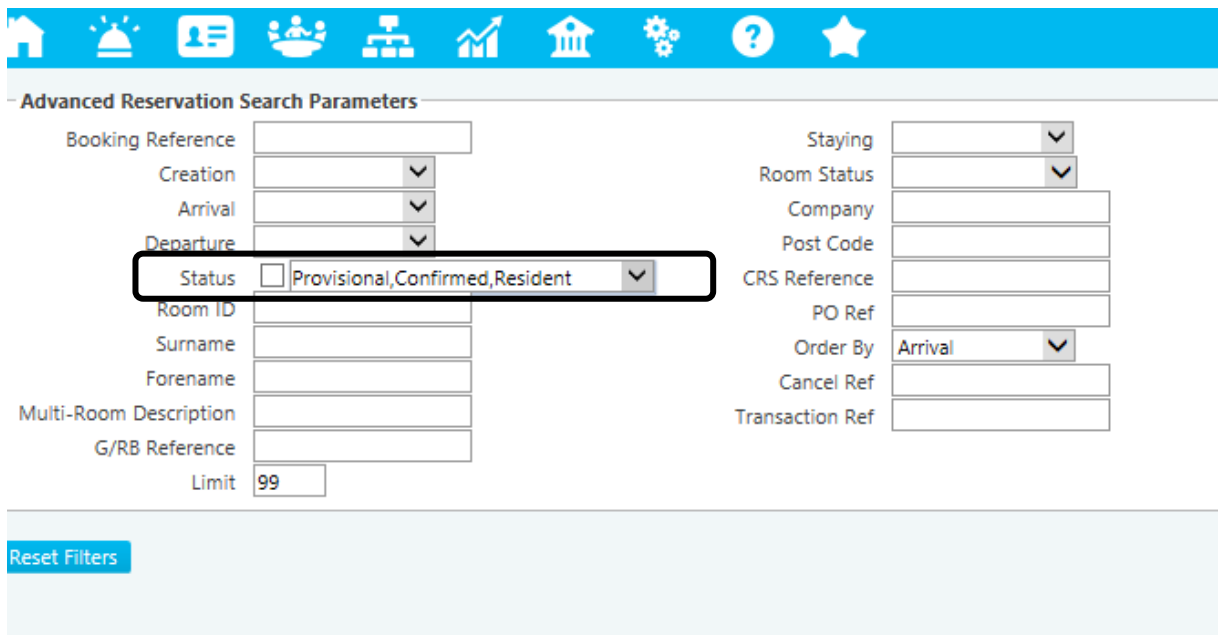
11. Send confirmation to the guest.

## Viewing Pro-forma & Transactions

Pro-forma's can be generated at any stage throughout the reservation prior to an invoice being generated for Student accounts, and at any point prior to check in for a commercial booking.

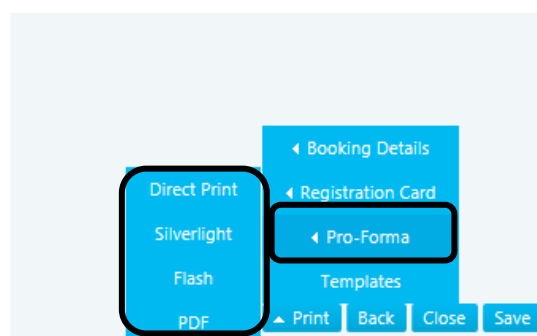
### Commercial

1. To view/print/email pro-forma navigate to your Guest Journey icon, and select **Search** under the **Reservations** heading.
2. Make sure you have the correct booking status' selected in **Status** drop down.



The screenshot shows the 'Advanced Reservation Search Parameters' form. The 'Status' dropdown menu is highlighted with a red box, showing the following options: Provisional, Confirmed, Resident. Other fields include Booking Reference, Creation, Arrival, Departure, Room ID, Surname, Forename, Multi-Room Description, G/RB Reference, Limit (99), Staying, Room Status, Company, Post Code, CRS Reference, PO Ref, Order By (Arrival), Cancel Ref, and Transaction Ref.

3. Search for the reservation you wish to view by any of the parameters available. \*Remember when searching by booking number it is the number beside the segment and not the CRS reference number.
4. Once you are in the reservation screen, at the bottom right corner you will find the **Print** button. Click **Print** and select **Pro-forma**. From here you can view or direct print the document.



## NB. Pro-forma Example View



### TRAINING Bankside House

24 Sumner Street  
London  
SE1 9JA

+44 (0)20 7107 5750

+44 (0)20 7021 0085

banksidereception@lse.ac.uk

<http://www.lsevacations.co.uk/Accommodation/Bankside-House>

## Pro-forma

Mr Peter Parker  
24 Morpeth Avenue  
Borehamwood  
Hertfordshire  
United Kingdom  
WD6 4BW

Lead Guest      Petra Parker

Room	
Room Type	3EB
Booking Reference	BA000431/2
Arrival	21/Jan/2017
Nights	2
Departure	23/Jan/2017
Adults	3
Children	0
Infants	0
Po Ref	

## Student Pro-Forma

1. To view/print/email pro-forma go to CRS Module – **Search**
2. Search for the reservation you wish to view by any of the parameters available.

**Advanced Reservation Search Parameters**

Property	<input type="text"/>	Booking Ref	<input type="text"/>
Property Town	<input type="text"/>	PMS	<input checked="" type="checkbox"/> CRS <input checked="" type="checkbox"/> Virtual <input type="checkbox"/>
Arrival Date	<input type="text"/> ▼	Distribution Ref	<input type="text"/>
Departure Date	<input type="text"/> ▼	Surname	<input type="text"/>
Creation Date	<input type="text"/> ▼	Forename	<input type="text"/>
Last Edit Date	<input type="text"/> ▼	Post Code	<input type="text"/>
Creation User	<input type="text"/>	Room Type	<input type="text"/> ▼
Last Edit User	<input type="text"/>	Company	<input type="text"/>
Limit	<input type="text" value="100"/>	Booking Status	<input type="checkbox"/> Provisional, Confirmed ▼
		From	<input type="text" value="Both"/> ▼

[Reset Filters](#)



3. Once you have found the booking required, click the **CRS booking reference**.

CRS00121	BA000144/1	13/Sep/2016	16/Sep/2016	TRAINING Bankside House	2EB	Miss Karen Fisher
CRS00122	BA000146/1	23/Dec/2016	24/Dec/2016	TRAINING Bankside House	2EB	Mrs Giuliana De Angelis
CRS00126	BA000147/1	14/Sep/2016	16/Sep/2016	TRAINING Bankside House	2EBA	Miss Karen Fisher

4. When in the reservation click the **Invoicing** tab. Hover over **View, Proforma** against each invoicing line and choose your viewing method or print or email. See image below:

The screenshot shows the 'Invoicing' tab selected in a navigation bar. Below it, a 'Balance' section displays '1036.35' and a 'Generate Invoice' button. A 'Transactions' section has a 'View' button highlighted. A dropdown menu is open, showing options: Direct Print, Silverlight, Flash, PDF, Html, RTF, and Email. The 'ProForma' option is highlighted in the dropdown.

## Invoice Reprint

### Student

1. Go to the **Invoicing** tab.
2. Click **Invoice Reprint** - **\*\*The most recent invoice generated will sit at the bottom of the list (above credit notes if created)\*\***

The following box will appear:

The dialog box shows 'Account 1 - PF00086' at the top. Under 'Document Details', the 'Document Date' is '24/Aug/2016'. At the bottom, there are two buttons: 'Invoice Reprint' and 'Unallocated Payments'.

3. Click on the relevant invoice you wish to resend/print.

Attach To Email									
Options	Document Ref	Document Type	CRSBookRef	Site ID	BookRef	Account Ref	Account Description	Amount	
<input type="checkbox"/> View ▶	CINV00000146	Invoice	CRS00155	LSETTEST1	BK00235	PF00086	Booking	660.00	Edit
<input type="checkbox"/> View ▶	CINV00000147	Invoice	CRS00155	LSETTEST1	BK00235	PF00086	Booking	770.00	Edit
<input type="checkbox"/> View ▶	CINV00000148	Invoice	CRS00155	LSETTEST1	BK00235	PF00086	Booking	880.00	Edit
<input type="checkbox"/> View ▶	CCRD00000073	CreditNote	CRS00155	LSETTEST1	BK00235	PF00086	Booking	-660.00	Edit
<input type="checkbox"/> View ▶	CCRD00000074	CreditNote	CRS00155	LSETTEST1	BK00235	PF00086	Booking	-770.00	Edit

**OR**



Go to the **Bank** icon, **Central Invoicing** and **Invoice Reprint**

1. You can search by many parameters to find the invoice you require.

**Smart Search**

**Advanced Invoices Search Parameters**

Document Type	<input type="text"/>	Document Ref	<input type="text"/>
Account Ref	<input type="text"/>	Created Date Start	<input type="text"/>
Account Description	<input type="text"/>	Created Date End	<input type="text"/>
PMS BookRef	<input type="text"/>	Site ID	<input type="text"/>
CRS BookRef	<input type="text"/>	Email	<input type="text"/>
Post Code	<input type="text"/>	Limit	<input type="text" value="100"/>
		Order By	<input type="text" value="Document Type"/>

2. However, when the results are returned it will not state the name of the booking, it will state the following:

Document Ref	Document Type	CRSBookRef	Site ID	BookRef
Account Ref	Account Description	Amount		
- Document Ref	- Document Type	- CRS Book Ref	- Site ID	
- Book Ref	- Account Ref	- Account Description	- Amount	

3. Once you have found the invoice you require, then you can hover over **View** and choose your method to print, view or email. You can also select more than one.

Reset Filters

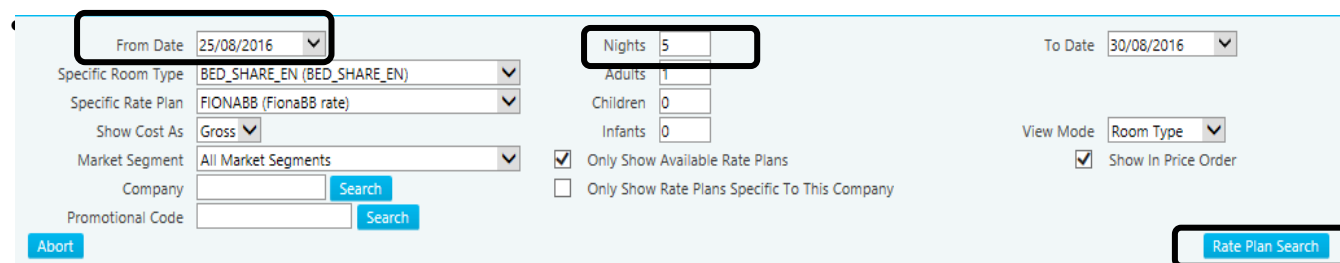
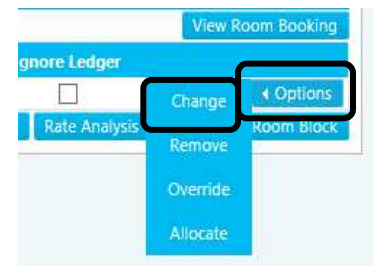
Attach To Email

Options	Document Ref
<input checked="" type="checkbox"/> View ▶ Direct Print	NV00000001
<input type="checkbox"/> View ▶ Flash	NV00000003
<input type="checkbox"/> View ▶ PDF	NV00000004
<input type="checkbox"/> View ▶ HTML5	NV00000018
<input type="checkbox"/> View ▶ RTF	NV00000011
<input type="checkbox"/> View ▶ Email	NV00000010
<input type="checkbox"/> View ▶	NV00000009
<input type="checkbox"/> View ▶	CINV00000008

## Amending Dates

### With Invoices having been Created Only

1. Make sure you are in the CRS booking.
2. Click into the **Rate Plan** tab and hover over **Options** button.
3. Click **Change** which will bring up the **Rate Plan Search** box.
4. Amend the date as agreed, or number of nights, click **Rate Plan Search**.

A screenshot of a 'Rate Plan Search' form. The form contains several fields and buttons. The 'From Date' field is set to '25/08/2016' and is highlighted with a red box. The 'Nights' field is set to '5' and is also highlighted with a red box. The 'To Date' field is set to '30/08/2016'. Other fields include 'Specific Room Type' (BED\_SHARE\_EN (BED\_SHARE\_EN)), 'Specific Rate Plan' (FIONABB (FionaBB rate)), 'Show Cost As' (Gross), 'Market Segment' (All Market Segments), 'Company', and 'Promotional Code'. There are two 'Search' buttons. At the bottom left is an 'Abort' button, and at the bottom right is a 'Rate Plan Search' button, both highlighted with red boxes. There are also checkboxes for 'Only Show Available Rate Plans' (checked) and 'Only Show Rate Plans Specific To This Company' (unchecked). A 'View Mode' dropdown is set to 'Room Type', and 'Show In Price Order' is checked.

5. select the relevant Rate Plan appropriate to the length of the extension.  
**NB.** If no results are shown it may be because the rate plan has changed or isn't available for the new range, to change the rate plan, choose Specific Rate Plan or select blank space at top to see all available plans.
6. Once you have identified the correct rate plan, hover over it and click the monetary value to select the new rate plan.
7. The rate plan change will be applicable from the date of when the booking was changed, not the dates of the extension period.
8. Save the booking.
9. As the invoice has only been created and not generated it will only update the invoiced created to the new cost of the stay.

**\*\*Please note if you have sent the pro-forma to the client/company then this will have to be re-sent with the new cost of the stay\*\***

## With Invoices having been Generated

1. Follow the process above until saving the booking.

Once the booking has been saved the below pop up box will appear. This is prompting you to remember that an invoice has previously been generating in the system.

2. Click **OK**

**Existing Central Invoicing Documents**

**Documents Credited**

Document Ref	Gross Value	Balance
CINV00000146	660.00	660.00

OK

3. Click back into the **invoicing** tab – the invoice now needs to be regenerate as changes have been made.

Amount	Balance
770.00	770.00 <a href="#" style="color: #00a0e3;">Generate Invoice</a>

If payment was taken for the initial booking on the creation date, this process will differ.

It will unallocated the payment and you will have to re-allocate the payment to the booking.

4. Click on **Unallocated Payment** and then choose the **allocate** button.

Account 1 - PF00086

Document Details

**Document Date**

25/Aug/2016

**Invoice Reprint**

Unallocated Payments

**Unallocated Payment**

TimeStamp	For Date	Operator Code	Gross	Balance	Payment Code	
24/08/2016 14:02:15	24/Aug/2016	SYSTEM_USER2	-770.00	-770.00	CASH	Adjust <span style="border: 1px solid black; padding: 2px 5px; border-radius: 3px;">Allocate</span>

OK

5. Choose if you wish to match/part match the payment and click **Save** once you have chosen.

**Allocate Payment**

**Outstanding Debits**

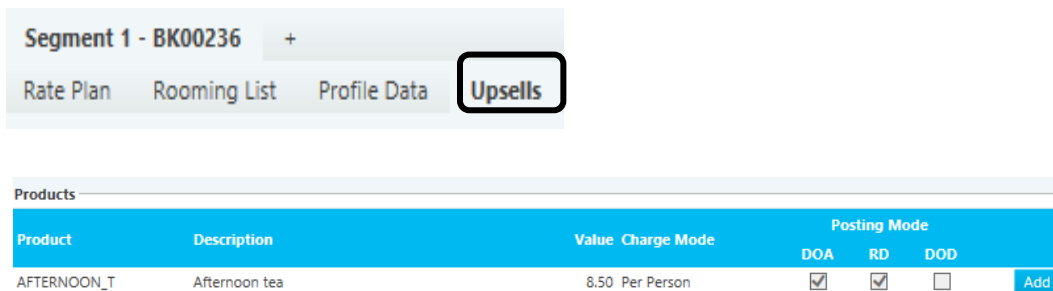
Time Stamp	Document Ref	Description	Balance	Match/Part Match
24/08/2016 14:20:52	CINV00000148		880.00	<input checked="" type="checkbox"/> 770

**\*\*Please note if you have sent the pro-forma to the client/company then this will have to be re-sent with the new cost of the stay.**

### Adding Upsells

#### With Invoices having been Created Only

1. Click on the **Upsells** tab within the segment you wish to add an upsell to. Select the product you wish to add to the segment.



2. Save the booking.
3. This will add the upsell onto the invoice total cost and no other changes are required.

**\*\*Please note if you have sent the pro-forma to the client/company then this will have to be re-sent with the new cost of the stay\*\***

#### With Invoices having been Generated

1. Please follow as above until saving the booking.
2. The only difference is you will have to generate the invoice again and if payment was taken before adding the upsell then you will have to allocate the payment by clicking on unallocated payments.

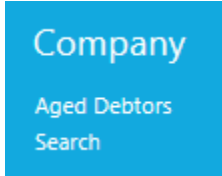
Amount	Balance	
770.00	770.00	<a href="#">Generate Invoice</a>

**Aged Debtors – \*\*\* Commercial Bookings Only \*\*\***

1. Go to the **Bank** icon.



2. Select **Company, Aged Debtors**.

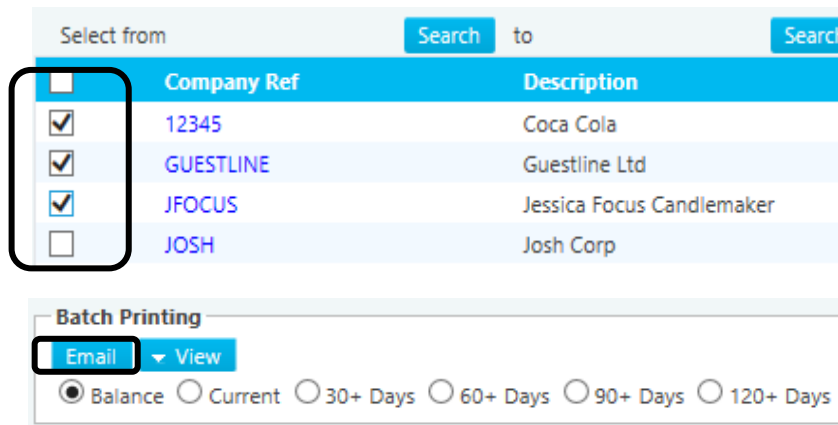


You are in the 'PMS Aged Debt Screen' which is an overview of all accounts with ageing debt.

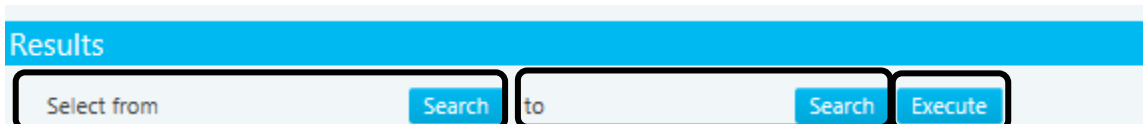
The Aged Debtors page is used to review the age of a company profile's debt or to generate account statements for distribution.

3. Tick the relevant company accounts and click the **Email** button to email a statement to the ticked company accounts. See image below.

The Accounts Payable Settings **Email Address** and **Template** fields have to be completed within the Company Profile page and in options in order to successfully email a statement.



4. Each time a statement is emailed to a company, an entry will be added to the company's Chase Activity tab.
5. The accounts grid can also be used to filter the statements by a specific company profiles or alphabetical range of company profiles using search from and to and executing.



- After clicking on the **Company Ref** it will take you into the account for that company.

Company Ref	Description
12345	Coca Cola
<b>GUESTLINE</b>	Guestline Ltd

## Account Status

Please find below description of button uses:

The '**Account Status**' tab is used to maintain the selected company profile's ledger account and displays the outstanding ledger balance and the age of that debt.

Balance	Current	> 30+ Days	> 60+ Days
590.00	590.00	0.00	0.00

Status	TimeStamp	Trans ID	Operator Code	Description	Gross Value	Balance
Unpaid	13/Jan/2017 09:26	INV000016	SYSTEM_USER2	Ledger transfer from BK000025/1/1 (Jones)	590.00	590.00

Status	TimeStamp	For Date	Trans ID	Operator Code	Description	Gross Value
No results were found to match your search						

**Create To Do** - Operational reminders for all areas of the business; they can be assigned to a specific operator or an operator group.

**Edit Company** - If any details i.e. address for the company were to change, this is one place where the information can be changed to the correct details.

**Pay/Allocate** - If amount paid is incorrect in the payment screen you can use '**Adjust**' to amend.

Use '**Allocate**' to set(match) part/all of the payment against an invoice(s).



'**Tracking**' will display all the activity within the selected transaction.

Click on '**Allocate**' and the Allocating Ledger Payment pop-up page will list the details of each invoice with an outstanding balance – the balance of each invoice is displayed.

Currency Cond ID
Adjust
Allocate
Tracking

## Add Payment

Payment Type	<input type="text" value=""/>	Payment Received	29/09/2016
Amount	0.00	Payment Description	Credit Received (KAREN)

## Outstanding Debits

Time Stamp	Document Ref	Description	Balance	Match	Part Match
29/09/2016 14:21:39	INV000002	Overdue	99.00	<input type="checkbox"/>	<input type="text"/>

Total Balance = 99.00  
Payment Balance = 0.00

Abort

Save

- The '**Payment Balance**' value, displayed at the bottom of the page, is the value of the payment/credit note to be allocated.
- To allocate the payment/credit note transaction, a combination of the following methods can be used:
  1. Clicking the 'Match' tick box of an invoice will allocate the full outstanding balance of the selected invoice, the 'Payment Balance' value will be reduced by the 'matched' amount
  2. Where the 'Payment Balance' value is less than the invoice being match, the full 'Payment Balance' value will be allocated to the invoice, leaving an outstanding balance the 'Part Match' field can be used to allocate
  3. Or (match) a specific amount of the 'Payment Balance' to an invoice
  4. Click the 'Save' button

## Payment

Adding a payment made by the company for their balance in arrears.

1. Click Payment Button
2. To make a payment, enter the amount against the relevant pay type and update the payment received (For Date) and description if required.
3. Clicking the 'Post' button will close the page and return the operator to the 'Account Status' tab; the new payment will be listed; clicking the 'Cancel' button will close the page.

## Add Ledger Payment

Payment Code	Description	
AMEX	American Express	0.00
BACS	Bacs	99.00
CASH	Cash	0.00

Payment Received	29/09/2016
Payment Description	Credit Received

Post

Abort



## Credit

Create A Credit Note: if the debt against a company profile has to be reduced, as the business has already 'gone through the sales of the property', a credit note has to be raised; clicking the 'Credit Note' button will display the Credit Note Transactions

## Invoice

Create An Invoice: an invoice can be raised against a company profile account, increasing the debt.

1. To raise an invoice, click **Invoice** and the **Invoice Transactions** page will be displayed

The Invoice Transactions page is used to build up a list of transactions which are then charged to the ledger account. When adding a charge to a ledger account, the correct analysis code has to be used in order to increase the correct type of business.

1. To build the invoice, enter a description of the charge into the 'Description' field and click the 'Add' button to display the Add Charge page; enabling a charge transaction to be added for each of the relevant analysis codes.
  - Once a charge transaction has been added to the invoice, it will be displayed in the Invoice Transactions page.
  - Ticking the tick box, adjacent to a transaction listed, and clicking the 'Delete' button will delete that transaction.

Description

<input type="checkbox"/>	Datetime	Code	Description	Quantity	Value Each	Amount
<input type="checkbox"/>	29/Sep/2016	DINNER	Dinner 28.09.2016	1	12.55	12.55
<input type="checkbox"/>	29/Sep/2016	BEVERAGE	Dinner 28.09.2016	1	7.20	7.20

- Clicking the '**Cancel**' button will close the page and return the operator to the '**Account Status**' tab;
- clicking the '**Post**' button will post the credit transactions and display the Print Bill page:

Print Bill

<input type="checkbox"/>	Type	Document Id	Description
<input checked="" type="checkbox"/>	Invoice	INV000003	Dinner 28.09.2016

## View

Allows you to view/print the statement for that particular company showing all the transaction history.

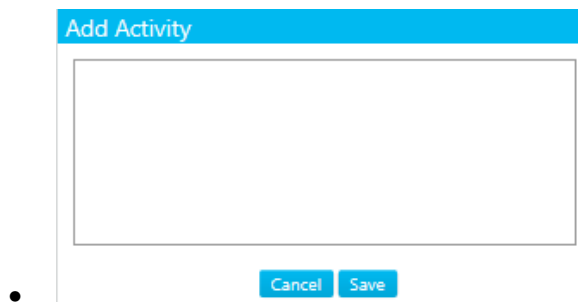
The Wright Luxury Lodge				Statement					
Lodge Lane Weston on Trent DE72 2BU 01234567891  wrightlodge@luxury.com www.wrightluxurylodge.com									
Guestline Ltd Shrewsbury Business Park Sitka Drive Shrewsbury Shropshire United Kingdom SY2 6LG		Company Ref Date		GUESTLINE 29/Sep/2016					
Date	Type	Reference	Description	Debit	Credit	Balance			
29/Sep/2016	INV	INV000002	Overdue	99.00		99.00			
29/Sep/2016	LC	CRD000001	Credit Received		-99.00	-99.00			
29/Sep/2016	INV	INV000003	Dinner 28.09.2016	19.75		19.75			
<b>Balance Due:</b>						<b>19.75</b>			
30+Days		60+Days		90+Days		120+Days		Current	
0.00		0.00		0.00		0.00		19.75	

## Chase Activity


The **Chase Activity** tab is used to log all relevant notes against the company profile.

All previous notes logged against the account are displayed in chronological order within the grid; the 'Start/End' date fields can be used to filter the notes by date range.

- To add a new note, click the **Add Activity** button and the **Add Activity** pop-up page will be displayed:



- The Add Activity pop-up consists of a free-type field; enabling all required information to be added to the note.
- Clicking **Save** will save the note and close the pop-up page; the new note will be displayed on the Chase Activity page.
- The **Next Chase Date** field is used to set the next date action is required; this date is exported within the 'Export Company Profiles' feature.



## Profiles

### People Profiles

Profiles can be searched/created/edited.



1. Click on the **Profiles** icon (ID Card).
2. From **People** click on **Search**.
3. This will take you through to the search section.
4. Under **Smart Search**, enter the surname and hit enter.

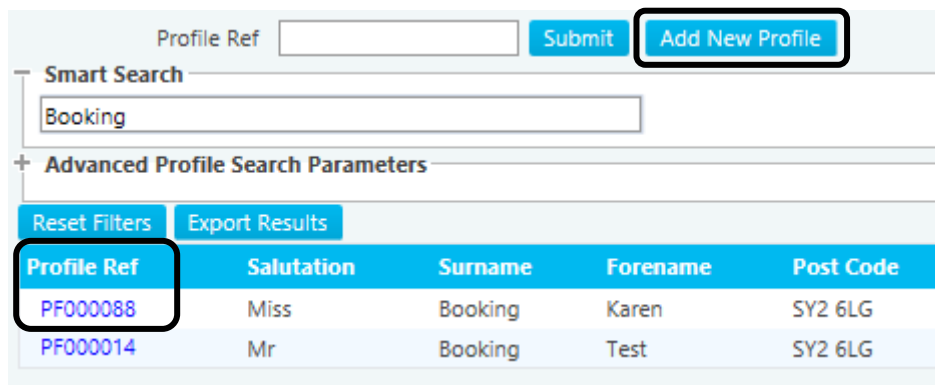


Profile Ref

Smart Search

+ Advanced Profile Search Parameters

5. This will search for an existing profiles in the system. If the profile exists click on the **Profile Ref**, if it does not exist click on **Add New Profile**.




Profile Ref

Smart Search

+ Advanced Profile Search Parameters

Profile Ref	Salutation	Surname	Forename	Post Code
<a href="#">PF000088</a>	Miss	Booking	Karen	SY2 6LG
<a href="#">PF000014</a>	Mr	Booking	Test	SY2 6LG

6. From clicking **Add New Profile**, if you need to create one only, will take you through to the profile card. The 2 sections to fill in first are as follows:



#### Details tab

Personal Information, Address, Contact Information, Preferences, Attributes

#### Notes tab

Any notes and details specific to this profile can be added i.e. allergic to feather pillows

These notes will follow the profile to any future bookings made. You will be prompted and asked if you wish to add these notes to the reservation.

7. More tabs will appear upon saving the profile.

There is a **History** tab showing all previous stays, dates, rates and total charges. In group mode this will show history across all the properties.

**Statistics** shows profile statistics as a booker and as a guest. Highlighting average spend, average rate plan, etc.

The **Correspondence** tab shows all emails sent from Rezlynx to the guest.

8. At the bottom of the page from clicking **Billing Addresses**, you can to add three further addresses which you can use to replace the profile address on an invoice with an alternative one.
9. Once all relevant fields are completed, click on **Save Changes**.

## Company Profiles

Similarly, to Profiles, Company Profiles can be Searched/Created/Edited.

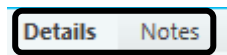


1. Click on the **Profiles** icon (ID Card).
2. From **Companies** click on **Search**.
3. This will take you through to the search section.
4. Under **Smart Search**, enter the company name and hit enter.

- This will search for an existing company profiles in the system. If the profile exists click on the **Company Ref**, if it does not exist click on **Add New Company Profile**.

Company Ref	Company Name
BOOKINGCOM	booking.com

- From clicking **Add New Company Profile**, if you need to create one only, will take you through to the company card. The 2 sections to fill in first are as follows:



#### **Details tab**

Company Information, Address, Contact Information, Default & Misc, Credit Control

#### **Notes tab**

Any notes and details specific to this Company, i.e. Rate agreed notes, room nights

- More tabs will appear upon saving the profile.

**Statistics** will take you to the Company Production report showing the details for the company regarding number of nights sold, company revenue generated, etc.

The **Activities** tab can be used by Accounts/Sales to show the Activities specific to this company such as invoice chasing or sales call.

- Once all relevant fields are completed, click **Save Changes**.

## Profile Merge



1. Click on the **Profiles** icon (ID Card).
2. From **People** click on **Merge Profiles**.
3. A pop up box will appear, you will need to input your password again.

### Confirm Credentials

The profile merge feature has an extra level of security. Be aware that using this functionality you will be merging and subsequently removing duplicate profiles.

Please re-enter your logon details to access this functionality.

Password

OK

There are 2 options to merge profiles. **Batch Merge** or **Individual Merge**. See below.

### Batch Merge

3 fields must be completed before the search can take place (surname is compulsory).

Click **Get Duplicates**.

Match Salutation       Include Blank Fields

Match Forename

Match Surname       Surname Filter

Match Person Type

Match Profile Type       Profile Type Filter

Match Street

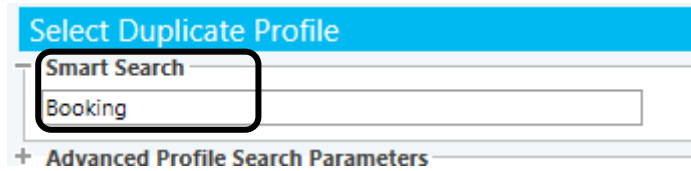
Match Postcode       **Get Duplicates**

From the results returned you can decide which profile to retain or if you do not want to merge a particular profile.

Booking							
Retain	Don't Merge	Profile Ref	Result	Profile Type	Salutation	Forename	Surname
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PF000097		Private	Miss	Karen	Booking
<input type="checkbox"/>	<input type="checkbox"/>	PF000098		Private		Karen	Booking
<input type="checkbox"/>	<input type="checkbox"/>	PF000088		Private	Miss	Karen	Booking

## Individual Merge

1. Search for the surname of the profile you would like to merge.

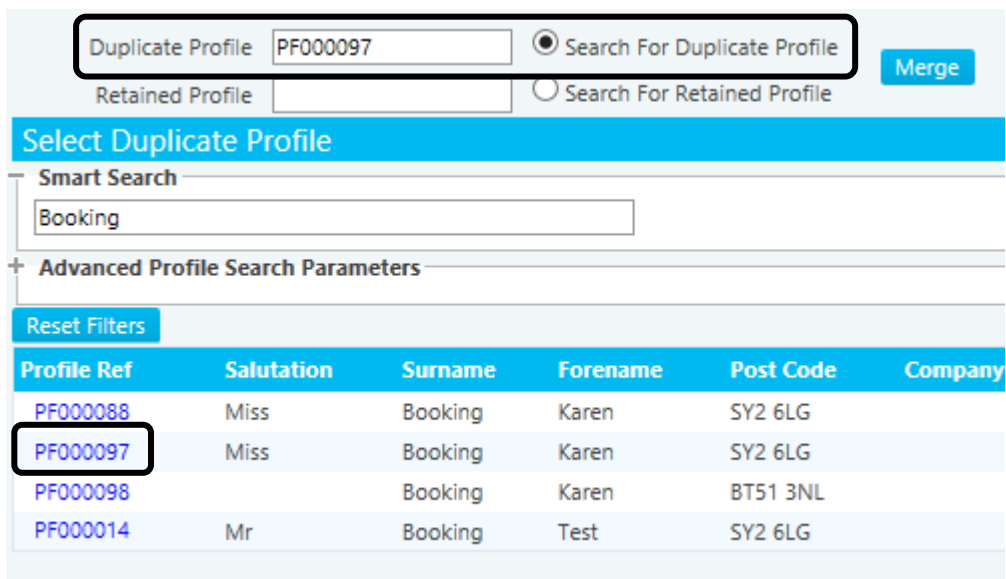


Select Duplicate Profile

Smart Search

+ Advanced Profile Search Parameters

2. Select the Duplicate profile and then click on the dot beside retained profile.



Duplicate Profile   Search For Duplicate Profile

Retained Profile   Search For Retained Profile

Select Duplicate Profile

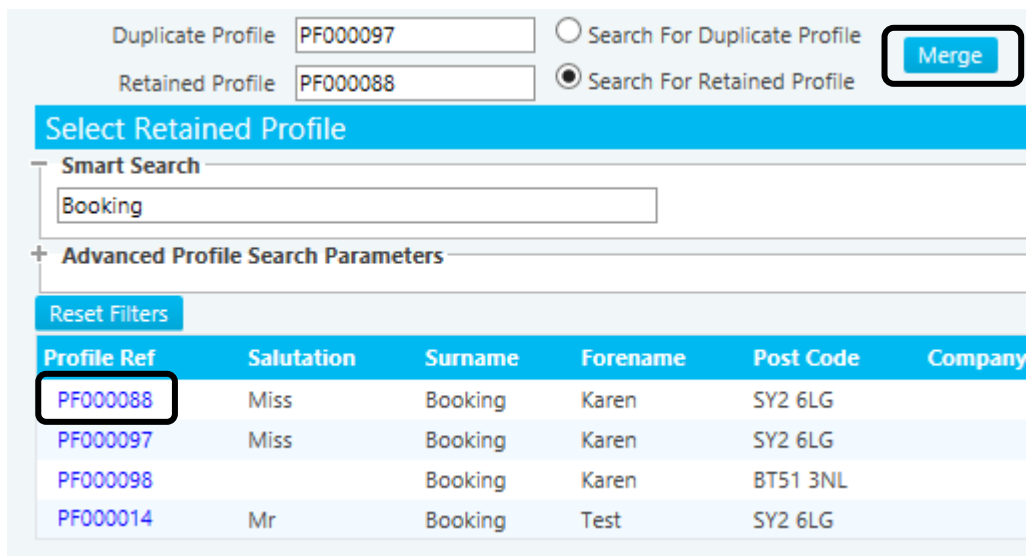
Smart Search

+ Advanced Profile Search Parameters

Reset Filters

Profile Ref	Salutation	Surname	Forename	Post Code	Company
<a href="#">PF000088</a>	Miss	Booking	Karen	SY2 6LG	
<b>PF000097</b>	Miss	Booking	Karen	SY2 6LG	
<a href="#">PF000098</a>		Booking	Karen	BT51 3NL	
<a href="#">PF000014</a>	Mr	Booking	Test	SY2 6LG	

3. Select the profile your wish to retain, then click **Merge**.



Duplicate Profile   Search For Duplicate Profile  Search For Retained Profile

Retained Profile

Select Retained Profile

Smart Search

+ Advanced Profile Search Parameters

Reset Filters

Profile Ref	Salutation	Surname	Forename	Post Code	Company
<b>PF000088</b>	Miss	Booking	Karen	SY2 6LG	
<a href="#">PF000097</a>	Miss	Booking	Karen	SY2 6LG	
<a href="#">PF000098</a>		Booking	Karen	BT51 3NL	
<a href="#">PF000014</a>	Mr	Booking	Test	SY2 6LG	

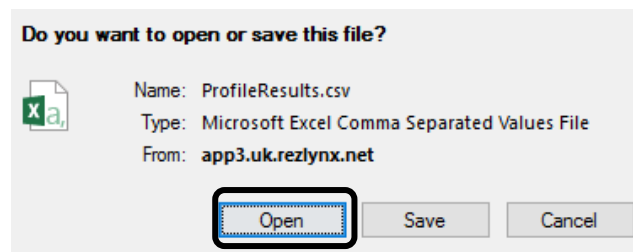
## Profile Export



1. Click on the **Profiles** icon (ID Card).
2. From **People** click on **Search**.
3. Click **Search** to return all profiles.



4. Click **Export Results** to create and a box will pop up to ask if you wish to Open, Save or Cancel the download.



If you **Save** or **Open** the file it will export the profiles into an excel spreadsheet for you to manipulate.

ID	Name	Address	Country	Postcode	Phone	Mobile	Email	Notes	Company	Contact	Credit	Line	Revenue	Revenue	Bookings	Bookings
1	John Adams	United Kingdom														
2	Ms Seema Adia	AD321 Houghton Street	United Kingdom				s.adia@tee.ac.uk					10000				
3	Test Adia	United Kingdom														
4	Heleen Black	123456 High St	United Kingdom									20000				
5	Allan Blair	1 Boston R London	United Kingdom													
6	Joe Briggs	52 Lincoln's inn fields London	United Kingdom				joe.briggs@mail.co									
7	James Bond	10 Down Ln London	United Kingdom				james.bond@gov.uk									
8	Simon Bond	1 Good Road Market To London	United Kingdom													
9	Simon Bond - Test	10 Bolton St Bolton	United Kingdom													
10	Booking CM00007	Shrewsbury Silke Driv Shrewsbury Shropshir	United Kingdom									5000				
11	Test Booking	LONDON	United Kingdom				testbooking@aol.co									
12	Max Branning1	1 London London	United Kingdom													
13	Max Branning1	United Kingdom														
14	Scott A Brouss	United Kingdom					This is a re									
15	Tommy Brunt	United Kingdom														
16	Tom Brunt1	United Kingdom														
17	Mr Bob Builder	1 James Close London	United Kingdom													
18	Mr Bob Builder	1 James Close London	United Kingdom													
19	Mr Damage Charge	1 High Roc Wembley London	United Kingdom													
20	Mr Kent Council	United Kingdom														
21	Ms Juliana De-Angels	United Kingdom														
22	Mr John Dell	United Kingdom														
23	Mr Car Driver	1 High Road London	United Kingdom													
24	Mr Car Driver	1 High Road London	United Kingdom													



## Batch Printing



1. Click on the **Guest Journey** icon (bell).
2. From **Front Office** click on **Batch Printing**.

You can print by the following:

- *Base Date* – Creation, Arrival, Departure or Resident
- *Print Date* – The date you wish to search for
- *Booking Status* – Any particular status you wish to search for i.e. Confirmed, Provisional
- *Recipient* – To return by contact or lead guest

3. From entering your criteria, click **Search**.

Base Date: Arrival  
Print Date: 16/12/2016  
Booking Status:  Provisional, Confirmed  
Recipient: Contact  
**Search**

4. You can print all the returned bookings by ticking the box in the blue header under **Print**.

Print	Email	Fax	SMS
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Confirmation:

5. From the drop down box choose which template you would like to print. Click **Set All** to feed onto each returned result.

6. Click **Execute** to print all the bookings selected.



## PMS

### Availability



1. Click on the **Guest Journey** icon (bell).
2. From **Property** click on **Availability**.

\*\* NB – Occupancy figures are shown based on ‘BEDS or Level 1 Combination rooms’ sold only. \*\*

At the top of the availability screen:

- *Date* – Along the top
- *Room Type* – Down the side
- *Numbers* – Rooms available to sell

Room Type	Group	Wed 01 Mar 17	Thu 02 Mar 17	Fri 03 Mar 17	Sat 04 Mar 17
1CB	SINGLE	253	253	253	253
1EB	SINGLE	32	32	32	32
2EB	TWIN	236	236	236	236
2EBA	TWIN	31	31	31	31
3EB	TRIP_QUAD	76	76	76	76
WFDE	SUP_FLATS	3	3	3	3
WFFD1E	SUP_FLATS	2	2	2	2
WJDE	SUP_ROOMS	2	2	2	2
WR1E	SINGLE	1	1	1	1
WRCDL	SUP_ROOMS	1	1	1	1
WRDC	QUEEN_DBL	1	1	1	1
WRDE	SUP_ROOMS	8			
X1EB	BED_SHARE	91			

	Wed	Thu	Fri	Sat
* Total Avail	737	737	737	737
Deductions	0	0	0	0
* Total Avail Less Deductions	737	737	737	737
Total Letting	8	8	8	8
* ROOS	0	0	0	0
* DFS	0	0	0	0
* Total Stock	745	745	745	745
* Occupancy%	1	1	1	1
Waitlist	0	0	0	0
Arrivals	0	0	0	0
Departures	0	0	0	0
Function Rooms	0	0	0	0
Products	0	0	0	0

At the bottom of the availability screen:

- Statistics based on the number of rooms booked, less deductions and products.

**Planner**



1. Click on the **Guest Journey** icon (bell).
  2. From **Property** click on **Planner**.
- Shows property level room stock in room number order
  - Rooms allocated shows as a block, colour's depend on booking status
  - Allocated rooms can be dragged and dropped between rooms from this screen
  - Filters to narrow down your viewing to the specific rooms you want to see.

Special Events	Fri 16 Dec 16	Sat 17 Dec 16	Sun 18 Dec 16	Mon 19 Dec 16	Tue 20 Dec 16	Wed 21 Dec 16
101						
102						
103						
104						
105						
106						
107						
108	Fisher [BA000180/1]					
109						
110						
111						

## Special Events



1. Click on the **CRS module** icon (organisational chart).
2. From **Configuration** click on **Events**.
3. Events can also be created via **Guest Journey** icon (bell), from **Property**, click on **Availability** or **Planner**.

Special Events will show on the following:

- Availability
- Planner
- Conference & Banqueting Diary

1. To input from the availability/planner, search for the date and select refresh. Click into the box of the date within the special events section.

Special Events	Thu 25 Aug 16	Fri 26 Aug 16	Sat 27 Aug 16

2. Choose your dates, group and description of the event and click save. (choose additional date range to add in many events in one go).

**Special Events**

Start Date  \* End Date  \*

Group  \*

Description  \*

3. Click **Save**. After saving you will see that special event in the heading.

Special Events	Thu 25 Aug 16	Fri 26 Aug 16	Sat 27 Aug 16
		Conference	

## Resident (In-House) Reservation Search



1. Click on the **Guest Journey** icon (bell).
2. From **Reservations** click on **Search**.
3. Search for the booking using the search parameters.

**Advanced Reservation Search Parameters**

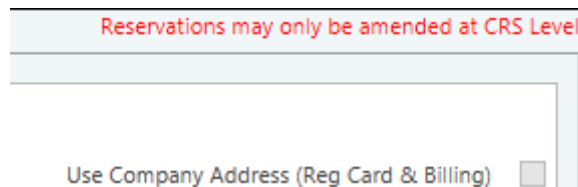
Booking Reference	<input type="text"/>	Staying	<input type="text"/>
Creation	<input type="text"/>	Room Status	<input type="text"/>
Arrival	<input type="text"/>	Company	<input type="text"/>
Departure	<input type="text"/>	Post Code	<input type="text"/>
Status	<input type="checkbox"/> Provisional, Confirmed	CRS Reference	<input type="text"/>
Room ID	<input type="text"/>	PO Ref	<input type="text"/>
Surname	<input type="text"/>	Order By	Arrival
Forename	<input type="text"/>	Cancel Ref	<input type="text"/>
Multi-Room Description	<input type="text"/>	Transaction Ref	<input type="text"/>
G/RB Reference	<input type="text"/>		
Limit	99		

[Reset Filters](#)

BookRef	From	To	Room	Room Type	Guest	Contact	Ad	Ch	Inf	Status
<b>BK000071/1</b>	01/07/2016	18/09/2016	169	1EB	Leo Ruiz	Leo Ruiz	1	0	0	Confirmed

4. Click on the **BookRef** to enter the booking.
5. PMS level search field for reservations, for viewing only, mainly for FOH information.

**\*\*NB Bookings cannot be amended here \*\*, when you click into a booking a notification appears like this image on the top right of the reservation.**

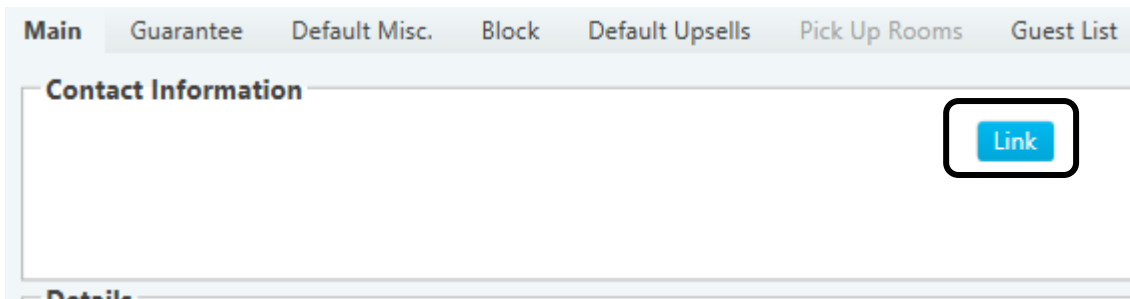


## Groups

### Creating a group

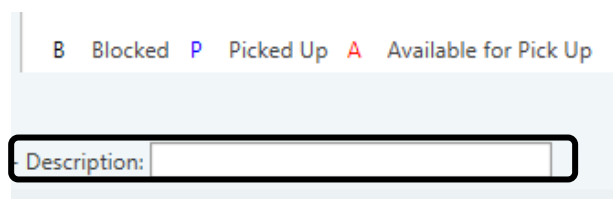


1. Click on the **Guest Journey** icon (bell).
2. From **Groups** click on **Create**.
3. Click **Link** to link a profile as the main contact. You can either search for an existing profile, or add a new profile at this stage.



If a profile exists select on the Profile Ref, if you need to create click on Add New Profile. See [People Profiles](#) for guidance.

4. Enter a **Group Description**. For example, a wedding group might be called JonesSmith210916.



### Linking a Company and/or Agent

1. Click on the **Search** beside Company or Agent.



2. Search for the company using the parameters. If the profile exists click on the **Company Ref**, if it does not click **Add New Company Profile#**

**Add New Company Profile**

**Smart Search**

**Advanced Company Search Parameters**

Company Ref	<input type="text"/>	Company Name	<input type="text" value="Booking"/>
Street	<input type="text"/>	Area	<input type="text"/>
Town	<input type="text"/>	County	<input type="text"/>
Country	<input type="text"/>	Postcode	<input type="text"/>
Telephone Number	<input type="text"/>	Email	<input type="text"/>
ABTA	<input type="text"/>	ATOL	<input type="text"/>
IATA	<input type="text"/>	Limit	<input type="text" value="99"/>
Show Deleted	<input type="checkbox"/>		

**Reset Filters**

Company Ref	Company Name	Contact	Street
BOOKINGCOM	booking.com		88 Western Gateway

Please see [Company Profiles](#) for more guidance.

### Details Section

1. Select your **Status**. Ensure you select a status which will affect your availability if you want to take the rooms out of your stock to sell for those night/s.

**Details**

NOTE: The Group has a status of Guaranteed which will affect availability

From	Nights	To	Status	Available For Pick Up
			<input type="text" value="Guaranteed"/>	Yes

2. Click **Update** which will launch the rate plan search screen. Search for your required dates, number of nights and required rate plan.

Rate Plan	Master Folio	
	Not Set	<input type="text" value="Update"/> <input type="text" value="Override"/>
Apply Rate Plan Rules When Picking Up Rooms <input type="checkbox"/>		

3. Select the **Specific Rate Plan** for the group. Note, room types will be picked up later.

From Date: 16/12/2016      Nights: 2      To Date: 18/12/2016

Specific Room Type: [Dropdown]

**Specific Rate Plan**: [Dropdown]

Show Cost As: Gross

Market Segment: [Dropdown]       Only Show Available Rate Plans       Show In Price Order

Company: [Text]             Only Show Rate Plans Specific To This Company

Promotional Code: [Text]     

Rate Plan	Room Type	Total F/N	Total	Avail	Total Avail
	1CB (Single Shared Bathroom Basic)	5.00	10.00	251	737
	1EB (Single En Suite Basic)	5.00	10.00	33	737
	2EB (Twin En Suite Basic)	5.00	10.00	237	737
	2EBA (Twin En Suite Basic Accessible)	5.00	10.00	30	737
	3EB (Triple En Suite Basic)	5.00	10.00	76	737
	G2EB (Cluster Twin En Suite Basic)	5.00	10.00	2	737
	G4EB (Cluster Quad En Suite Basic)	5.00	10.00	44	737
	GWFFD1E (Cluster Superior Flat 2 Bedrooms Double & Single En Suite)	5.00	10.00	2	737
BAR BB (BAR BB Rate)	GWRDC (Cluster Superior Room Queen/Double Shared Bathroom)	5.00	10.00	0	737

4. **Group Notes** can be added. These notes will only stay on the main page of the group booking.

**Group Notes**

### Group Booking Tabs

5. Click on the **Guarantee** tab and select your pay **Type** information.

Type: [Dropdown]

**Comments**

**Ledger**

Ledger     

6. Click **Save** to generate the Group Booking Reference.

Group Reference: GA000085 - Description: TEST16122016

Created by SYSTEM\_USER2 on the 16/Dec/2016 at 14:34

Edited by SYSTEM\_USER2 on the 16/Dec/2016 at 14:34



- Click in the **Default Misc.** tab to enter notes to each room, any notes populated here will copy to bedroom bookings as they are picked up.

**Private Notes**

**Public Notes**

**Food & Beverage Notes**

**Housekeeping Notes**

**Confirmation Notes**

- Select the **Deposit Due Date** and **Deposit Due Amount** if applicable. Change the **Media Source Code** to the relevant option.

**Default Deposit Details**

Deposit Due Date

Deposit Due Amount

**Default Miscellaneous Details**

Market Source Code

Media Source Code

Purchase Order Ref

Allow Room Moves

- Select the Default Upsells tab this can be used at any stage prior to picking up your rooms to ensure that chosen products are posted onto the reservations as they are picked up.

**Default Reservation Offers**

Description	Value	Quantity
BB Bakery afternoon Tea Tour - Adult	5	10
BB Bakery Afternoon Tea Tour - Child	0.00	

## Add/Remove Rooms

1. Click the Block tab at the top of the screen. Click on Show Availability to see available rooms for the night(s) selected.

**Block**

Start Date: 16/12/2016 End Date: 18/12/2016 Refresh Block Rhythm **Show Availability**

B Blocked P Picked Up R Available for Pick Up

Room Type	Ad	Ch	Inf	Fri 16/Dec/2016				Sat 17/Dec/2016			
				A	B	P	R	A	B	P	R
No results were found to match your search											

Remove Add Combination

Main Guarantee Default Misc. **Block** Default Upsells Pick Up Rooms Guest List

**Block**

Start Date: 03/08/2016 End Date: 05/08/2016 Refresh Block Rhythm Hide Avail

Room Type	Room Type Group	Wed 03/Aug/2016	Thu 04/Aug/2016
BED_SHARE	BEDS	0	0
BED_SHARE_EN	BEDS	8	9
DOUBLE_ROOM	BEDS	11	13
ECO_TWIN	BEDS	16	16
F_1TW_3SGL	FLATS_LEVEL2	2	2
F_2TW_3SGL	FLATS_LEVEL2	9	10
F_RE_1DB_3SG	FLATS_LEVEL2	1	1
F_RE_3DB_2SG	FLATS_LEVEL2	3	4
F_RE_TW_4SGL	FLATS_LEVEL2	0	0
FL_RE_4SGL	FLATS_LEVEL2	9	9
FL_RE_5SGL	FLATS_LEVEL2	2	2
SHAF_TWIN_TR	COMBI_BEDRS	0	0
SHAFT_SINGLE	BEDS	54	54
SINGLE	BEDS	48	51
SINGLE_ENSUI	BEDS	2	2

2. Add rooms by clicking **Add Combination**. This will firstly ask for the room type, and then the number of adults, children and infants. E.g. If all your rooms are for single occupancy, simply fill in the number of adults as 1, then press apply.

**Block**

Start Date: 16/12/2016 End Date: 18/12/2016

B Blocked P Picked Up R Available for Pick Up

Room Type	Ad	Ch	Inf	Fri 16/Dec/2016				Sat 17/Dec/2016			
				A	B	P	R	A	B	P	R
No results were found to match your search											

Remove **Add Combination**

**Add Room Type**

Room Type  3EB

Ad  Ch  Inf  Blocks

Abort **Add additional pax** Apply

If you wish to have some room types with various occupants, simply add another combination of rooms. This will add another line against the room type, or select add additional pax in the original combination.

3. Add the number of rooms per room type under the **R** column.

Room Type	Ad	Ch	Inf	Fri 16/Dec/2016				Sat 17/Dec/2016				
				A	B	P	R	A	B	P	R	
<input type="checkbox"/> 2EB		2	0	0	237	0	0	<input type="text" value="0"/>	237	0	0	<input type="text" value="0"/>
<input type="checkbox"/> 3EB		2	0	0	76	0	0	<input type="text" value="0"/>	76	0	0	<input type="text" value="0"/>

A = number of rooms of that type available

B = number of rooms blocked of that type (as above)

P = number of rooms picked up (at this point this will always show 0)

R = number of rooms remaining to be picked up

4. Click **Save** for the **B** column to update.

Room Type	Ad	Ch	Inf	Fri 16/Dec/2016				Sat 17/Dec/2016				
				A	B	P	R	A	B	P	R	
<input type="checkbox"/> 2EB		2	0	0	232	5	0	<input type="text" value="5"/>	232	5	0	<input type="text" value="5"/>
<input type="checkbox"/> 3EB		2	0	0	71	5	0	<input type="text" value="5"/>	71	5	0	<input type="text" value="5"/>

5. To remove one of your combinations, select the room type and click **Remove**. The following warning message appear. Click **Yes**.

Room Type	Ad	Ch	Inf	Fri 16/Dec/2016				Sat 17/Dec/2016				
				A	B	P	R	A	B	P	R	
<input checked="" type="checkbox"/> 2EB		2	0	0	232	5	0	<input type="text" value="5"/>	232	5	0	<input type="text" value="5"/>
<input type="checkbox"/> 3EB		2	0	0	71	5	0	<input type="text" value="5"/>	71	5	0	<input type="text" value="5"/>

Do you want to remove the selected Blocked Rooms?  
Please note that if you choose to remove it, the changes will be automatically saved. Also, if a room is already picked-up, it will not be removed.

## Block Rhythm

Allows you to add the number of rooms required per night in one step, rather than filling in each box individually.

1. Click **Block Rhythm** and fill in the required fields:

Block

Start Date 16/12/2016 End Date 18/12/2016 Refresh Block Rhythm

Block Filter

Block Value 1  
Room Type 2EB (A: 2, C: 0, I: 0)  
Start Date 16/12/2016  
End Date 18/12/2016

Cycle

Daily  Every 1 day(s)  
 Every weekday  
 Every weekend

Weekly Every 1 week(s) on:  
S M T W T F S

Monthly  Day 1 of every 1 month(s)  
 The first of every 1 month(s)

Abort OK

2. Fill in the criteria required.
  - **Block Value:** Number of rooms required
  - **Room Type:** Select which combination you want to fill, so if you've select a combination for 1 adult and 2 adults, it will provide a drop down for this selection
  - **Start/End Date:** Which nights you wish to use the block rhythm feature for. This will default to the group start and end dates already entered.
  - **Cycle:** Select one of these options: Daily, Weekly or Monthly. When using groups, the most common option would be to select daily, as this will block off the number of rooms selected above on each day of your block.
3. Click **OK**. Room summary will appear on the group main page.

### Summary

Summary Stats	Total Nights	20
	Picked Up	0
	Not Picked Up	20

## Override

1. From the **Main** tab, click on **Override** on the **Details** section.

**Master Folio**

Not Set    Update    **Override**

Apply Rate Plan Rules When Picking Up Rooms

**Override**

Type: Gross ▼

Override Reason:  \*

Room Type	Ad	Ch	Inf	
2EB	2	0	0	<input type="text"/>
3EB	2	0	0	<input type="text"/>

Set All

Abort    **Save**

2. Type the desired rate into the box next to the room combination.
3. Type in an override reason.
4. Click **Save**.

## Rate Plan Change

Rate changes from the mid stay change section are only available prior to picking up rooms.

1. From the **Main** tab under **Mid Stay Changes**, click on the **Add** button.

**Mid Stay Changes**

ID From	Nights To	Market Segment	Rate Plan	Ignore Ledger
No results were found to match your search				

**Add**

2. The rate search page will pop up, change the date for the mid stay change and the rate plan.

From Date: 20/12/2016      Nights: 1      To Date: 21/12/2016

Specific Room Type:   
 Specific Rate Plan: **STU\_A\_TERM (Student rate A term)**   
 Show Cost As: Gross   
 Market Segment:   
 Company:   
 Promotional Code:

Only Show Available Rate Plans       Show In Price Order   
 Only Show Rate Plans Specific To This Company

**Rate Plan Search**

3. Click on **Rate Plan Search** to generate the rate return and select the rate plan.

**Rate Plan Search**

Rate Plan	Room Type	Total F/N	Total	Avail	Total Avail
STU_A_TERM (Student rate A term)	1CB (Single Shared Bathroom Basic)	19.56	25.06	251	706
	1EB (Single En Suite Basic)	19.56	25.06	27	706
	2EB (Twin En Suite Basic)	19.56	25.06	232	706
	2EBA (Twin En Suite Basic Accessible)	19.56	25.06	25	706
	3EB (Triple En Suite Basic)	19.56	25.06	61	706
	G2EB (Cluster Twin En Suite Basic)	19.56	25.06	2	706
	WFDE (Superior Flat 1 Bedroom Queen/Double Ensuite)	19.56	25.06	3	706
	WFFD1E (Superior Flat 2 Bedrooms Double & Single En Suite)	19.56	25.06	2	706

4. The Mid Stay Change once selected will update on the line.

Mid Stay Changes

ID	From	Nights To	Market Segment	Rate Plan	Ignore Ledger	Options
1	20/Dec/2016	1 21/Dec/2016	GRPV	STU_A_TERM	<input type="checkbox"/>	<b>Options</b>

Summary

## Group Series

1. Select **Options** button, click on **Group Series**.

Start Date: 19/12/2016

Pick List

Copy Properties

Release Rules

**Group Series**

Add Function Room

**Options**    Print    Back    Close    Save

2. Click on **Search**. This will show any groups already associated.

Search      Start Date: 19/12/2016      End Date: 21/12/2016

Show All      **Search**

3. Click on **Create Group Series** to begin.

**Create Group Series**

Search      Start Date       End Date   
 Show All

4. Complete the details for the Group Series you are creating. Click **Save** once completed.

**Group Details**

Group Description       Arrival       Number of Nights

**Date Series**

From       To

Weekly      Every  of every  week(s).  
 Monthly       Day  of every  month(s).  
 The   of every  month(s).  
 Create       non-dated entries in the grid.

**Copy Options**

Booking status       Miscellaneous details       Private notes   
 Reservation details       Public notes   
 Deposit due details   
 Company ledger details       **Create Grid**

- **Group Details** - This section shows what has already been built for the existing group
- **Date Series** - How far out will your copied groups go? So here we've set the date until the end of 2016, because the group is being copied 5 times until the end of the year.
- **Weekly/Monthly** - If the group is repeated on a weekly or monthly basis, these areas can be used when there is a defined day/week/month that the tour always stays on
- **Copy Options** - Select which areas of the group you want to copy to your series
- **Create Grid** - Using this area will allow you to create up to 10 entries in the grid, with dates selected by you.

### Group Series Grid

**Group Series Grid**

Group Description	Arrival	Booking Status	Results
<input type="text"/>	* <input type="text" value="19/12/2016"/>	<input type="text" value="Option"/>	

5. Free-type the name of the group, set the arrival date on each row & change the booking status.

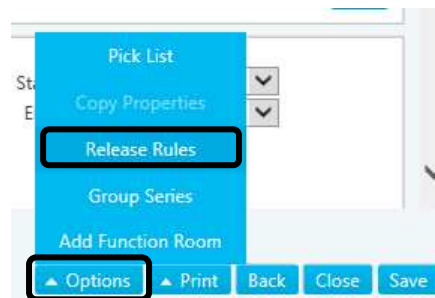
6. Click **Save**.



## Release Rules

Allows automated room release into availability, avoids having to manually release rooms.

1. Select **Options** button, click on **Release Rules**.



2. Click the **Add** button.



3. Fill in the required field to complete the release rule.

Room Type	Lead In Days	Type	By	Value
ALL <input type="button" value="v"/>	7	Percentage <input type="button" value="v"/>	Day By Day <input type="button" value="v"/>	1

- **Room Type** - all room types, or specific ones?
- **Lead in Days** - days before arrival would you like to release the rooms?
- **Type** - Are you releasing your rooms by a percentage, a fixed number, or all of them?
- **By** - release all at once, or one day at a time?
- **Value** - filled in your type column with percentage or fixed, you will need to fill in your value box.



For example, if you are releasing 50% of your rooms then you would set the type to percentage and the value to 50.

Return to Availability	Warning	Days Prior	To	Internal	External	
<input type="checkbox"/>	<input type="checkbox"/>	7 ▼	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	
					<input type="button" value="Address Book"/>	<input type="button" value="Remove"/>

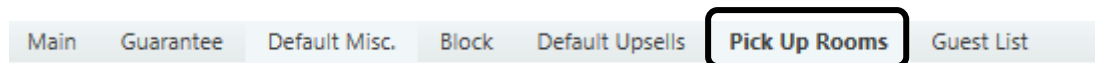
- **Return to Availability** - Un-picked-up rooms will go back to the hotel availability.
  - **Warning** - Should the system generate a warning, either to you, your guest or both?
  - **Days Prior** - days prior to the release date would you like to receive a warning?
  - **Internal** - Warning is sent to an internal system user (Rezlynx Pop Up when logged in)
  - **External** - Warning is sent to a contact set up within the address book button. (email)
4. Click on **OK** to save the release rule.



5. Click on **Add** should you wish to have many release rules within the Group.

## Picking Up Rooms

1. Click on **Pick Up Rooms** tab.



2. Choose how to pick up your rooms & Refresh:
- free type the name when clicking into any of the title
  - use the group contact name
  - use the group contact profile (LINKED)

Enter each guest name individually  Use group contact as free-type guest  Use group contact as guest profile

3. Click on the blank line on the booking to enter the details.

Arrival	Nts	Departure	Room Type	Rate Plan	Ad	Ch	In	Batch Update	Title	Forename	Surname
19/12/2016	2	21/12/2016	2EB	BB_BB	2	0	0	Update	Miss	Test	Booking
19/12/2016	2	21/12/2016	2EB	BB_BB	2	0	0	Update			

4. **Link** the profile if a profile exists, tick the **P/U** box for the first reservation to pick up, then click **Use New Reference**.

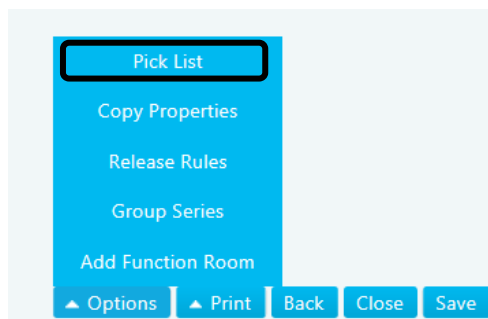


5. To pick up the remaining rooms click on the P/U after filling in the names, click **Add to Existing Booking**.



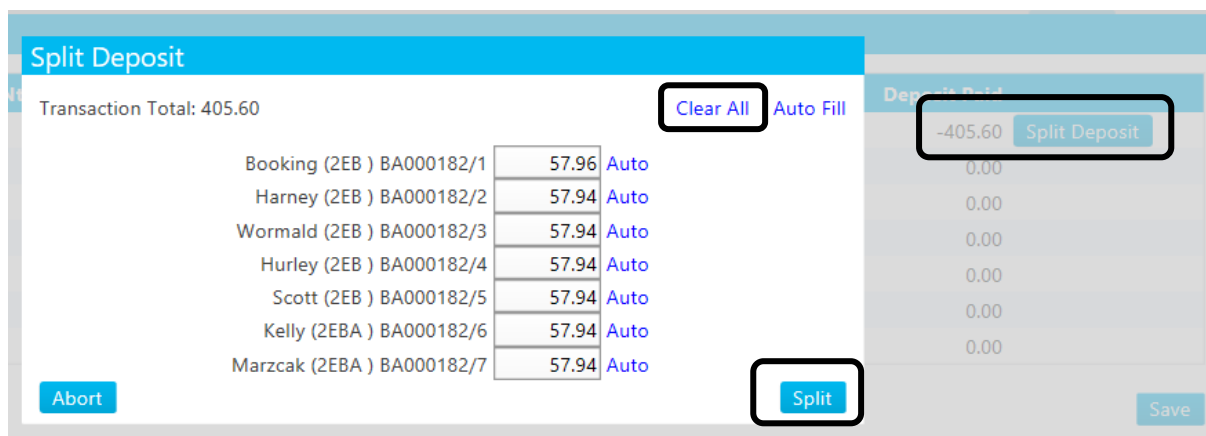
### Pick List

1. Select **Options** button, click on **Pick List**, to view rooms that have been picked up.



BookRef	Arrival	Nts	Departure	Room Type	Ad	Ch	In	Title	Initial	Surname	Master	Deposit Paid
BA000182/1	19/12/2016	2	21/12/2016	2EB	2	0	0	Miss	T	Booking	<input checked="" type="radio"/>	0.00
BA000182/2	19/12/2016	2	21/12/2016	2EB	2	0	0		Z	Harney	<input type="radio"/>	0.00
BA000182/3	19/12/2016	2	21/12/2016	2EB	2	0	0		C	Wormald	<input type="radio"/>	0.00
BA000182/4	19/12/2016	2	21/12/2016	2EB	2	0	0		D	Hurley	<input type="radio"/>	0.00

2. Click on **BookRef** to go into one of the rooms to add a deposit or to make individual changes.
3. Set rooms as a master account, and split a deposit added to an individual room between all or some rooms in the pick list.
4. Click on **Save**.



5. To split a deposit, click on **Split Deposit**, the amount is automatically split. If you need to create a different split, click on **Clear All** and enter the actual amounts.

6. Click on **Split**.

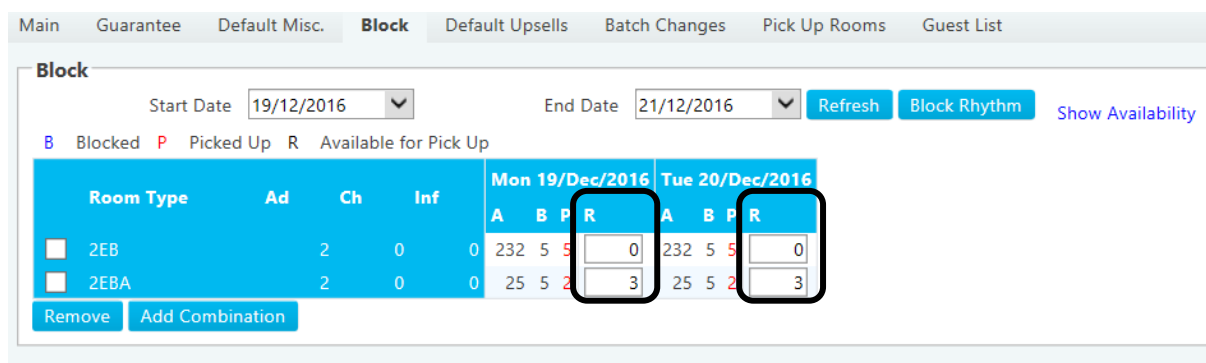
## Group Changes

Depending on whether your rooms have been picked up defines how you make changes.

### *Rooms which have been blocked, but not picked up:*

1. To change the number of rooms on a block, from the **Block** tab, adjust the number of rooms in the **R** column.

2. Click **Save**.



3. To change to a whole new set of dates, remove the blocked rooms first.

4. Click **Save**.

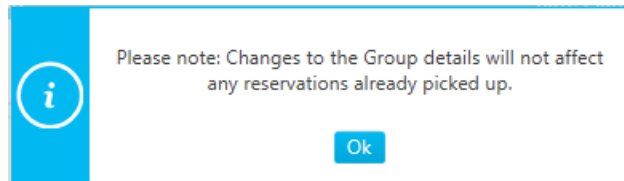
5. From the **Main** tab, click on **Update** within the Details section.

**Details**  
NOTE: The Group has a status of Guaranteed which will affect availability

From	Nights	To	Status	Available For Pick Up	Rate Plan	Master Folio
19/Dec/2016	2	21/Dec/2016	Guaranteed	Yes	BB_BB	Set <input type="button" value="Remove Master"/> <input type="button" value="Update"/> <input type="button" value="Override"/>

Apply Rate Plan Rules When Picking Up Rooms

You will see the below message:



- Click **Ok** to proceed to Rate Plan Search and then search for availability/rates based on the new dates required.
- Go to the **Block** tab, add your rooms back on.
- Click on **Save**.

**Rooms which have been picked up:**

- Go to the **Batch Changes** tab.

Main	Guarantee	Default Misc.	Block	Default Upsells	<b>Batch Changes</b>	Pick Up Rooms	Guest List
------	-----------	---------------	-------	-----------------	----------------------	---------------	------------

- Click on the room (s) you need to amend. **\*\*Please note must be done by Room Type\*\***

<input type="checkbox"/>	BookRef	Guest Name	Booking Status	Arrival Date	Departure Date	Room Type
<input type="checkbox"/>	BA000182/1	Booking, T	Confirmed	19/12/2016	21/12/2016	2EB
<input checked="" type="checkbox"/>	BA000182/2	Harney, Z	Provisional	19/12/2016	21/12/2016	2EB
<input type="checkbox"/>	BA000182/3	Wormald, C	Provisional	19/12/2016	21/12/2016	2EB
<input type="checkbox"/>	BA000182/4	Hurley, D	Provisional	19/12/2016	21/12/2016	2EB
<input type="checkbox"/>	BA000182/5	Scott, B	Provisional	19/12/2016	21/12/2016	2EB
<input type="checkbox"/>	BA000182/6	Kelly, E	Provisional	19/12/2016	21/12/2016	2EBA
<input type="checkbox"/>	BA000182/7	Marzcak, P	Provisional	19/12/2016	21/12/2016	2EBA

You will have Four Options:

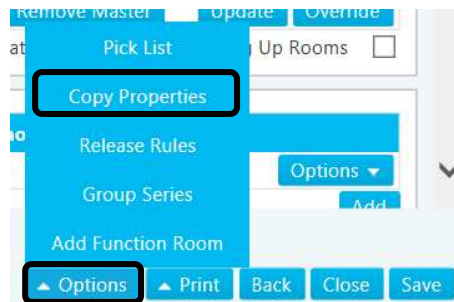
- Add Booking Line** – Allows you to add additional nights following on from the previous nights booked
- Replace Existing Booking Line** – Allows you to remove the current rate or room type and change them to a new selection and reduce nights
- Rate Override Booking Lines** – To override the rate for specific booking lines

- **Rate Override Reservations** – To override the rate for all nights of a booking

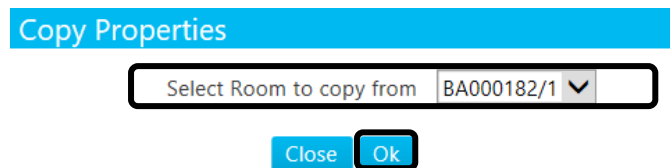
## Copy Properties

Allows you to copy data to all or some of the rooms within your group, without the need to go into each reservation individually and amend.

1. From the **Options** button, click on **Copy Properties**.



2. Select the room you wish to copy properties from, click **Ok**



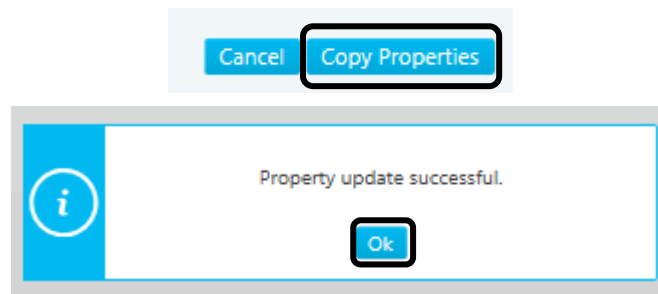
3. Select the section you wish to copy properties from. Tick the box on that section or add more notes and the box will auto tick



4. Scroll down and tick the rooms you wish to copy to

Bookings To Copy To			
<input type="checkbox"/>	BookRef	Room	Guest Name
<input type="checkbox"/>	BA000182/1		Booking, T
<input type="checkbox"/>	BA000182/2		Harney, Z
<input type="checkbox"/>	BA000182/3		Wormald, C
<input type="checkbox"/>	BA000182/4		Hurley, D
<input type="checkbox"/>	BA000182/5		Scott, B
<input type="checkbox"/>	BA000182/6		Kelly, E
<input type="checkbox"/>	BA000182/7		Marzcek, P

- Click **Copy Properties**, a box will appear to state if it was successful or not, click **Ok**.



## Guest List

- From the **Guest List** tab, if you have already picked up your rooms when you receive a rooming list, you are able to edit this using the Guest List:

Main   Guarantee   Default Misc.   Block   Default Upsells   Batch Changes   Pick Up Rooms   **Guest List**

Room Pick ID 1 - Room: 2EB Arrive: 19/Dec/2016 Depart: 21/Dec/2016

Miss	Test	Booking	<b>Options</b>	ETA	
		M	<b>Options</b>	ETA	

PAX Limit Reached

**Add PAX** ▶

- Click the **Add Pax** button to add extra Adults/Children/Infants to the room.
- Either free-type or Options & link each guest name, filling in an ETA if known.

## Print Options

### Print Rooming List

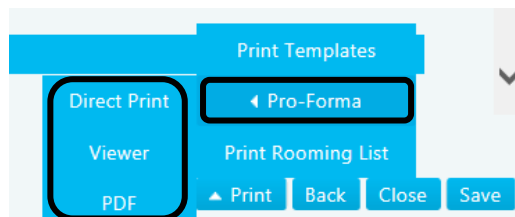
- From the **Print** button, click on **Rooming List**. Select any **Notes to Print** if required.

Notes to Print

- Click the **View** button, to view, print or email.

### Pro Forma

- From the **Print** button, click on **Pro-Forma**.



- Choose **Direct Print**, Silverlight **Viewer** or **PDF** viewer.

Note that this report will not show individual rooms and prices. If the customer requires a breakdown of this, it is advisable to use a confirmation template.

### Print Templates

- From the **Print** button, click on **Print Templates**.

- BookRef – Summary**, will always detail every room pick
- BookRef – Individual Booking Numbers**, are individual Confirmations per room.

Print	Email	Fax	SMS	BookRef	Guest Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Summary	Booking, Test
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BA000182/1	Booking, T
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BA000182/2	Harney, Z
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BA000182/3	Wormald, C
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BA000182/4	Hurley, D
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BA000182/5	Scott, B
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BA000182/6	Kelly, E
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BA000182/7	Marzcak, P

- To email select the **Email** box for that particular booking. Select the **Template**, click **Execute**

Template	
ARRIVAL_EXAMPLE	View
ARRIVAL_EXAMPLE	View
ARRIVAL_EXAMPLE	View
ARRIVAL_EXAMPLE	View
ARRIVAL_EXAMPLE	View
ARRIVAL_EXAMPLE	View
ARRIVAL_EXAMPLE	View
ARRIVAL_EXAMPLE	View
ARRIVAL_EXAMPLE	View

**Execute**

## Room Blocks

### Creating a Room Block



1. Click on the **Guest Journey** icon (bell).
2. From **Room Blocks** click on **Create**.
3. Click **Link** to link a profile as the main contact. You can either search for an existing profile, or add a new profile at this stage.

Main   Guarantee   Default Misc.   Block   Default Upsells   Pick Up Rooms   Guest List

**Contact Information**

**Link**

Details

If a profile exists select on the Profile Ref, if you need to create click on Add New Profile.

See [People Profiles](#) for guidance.

4. In **Description** enter a room block description. For example, a wedding group might be called JonesSmith210916.

Description:  Reference(optional):

### Linking a Company and/or Agent



1. Click on the **Search** beside Company or Agent.

Company

Agent

Source

2. Search for the company using the parameters. If the profile exists click on the **Company Ref**, if it does not click **Add New Company Profile#**

[Add New Company Profile](#)

+ Smart Search

**Advanced Company Search Parameters**

Company Ref	<input type="text"/>	Company Name	<input type="text" value="Booking"/>
Street	<input type="text"/>	Area	<input type="text"/>
Town	<input type="text"/>	County	<input type="text"/>
Country	<input type="text"/>	Postcode	<input type="text"/>
Telephone Number	<input type="text"/>	Email	<input type="text"/>
ABTA	<input type="text"/>	ATOL	<input type="text"/>
IATA	<input type="text"/>	Limit	<input type="text" value="99"/>
Show Deleted	<input type="checkbox"/>		

[Reset Filters](#)

Company Ref	Company Name	Contact	Street
BOOKINGCOM	booking.com		88 Western Gateway

Please see [Company Profiles](#) for more guidance.

### Details Section

1. Enter the **Start & End** date of the block.
2. Change the **Status** of the block.
3. Select the **Forecasted Rate Plan**.

Details

Start

End

Status

Available For Pick Up

Affects Availability

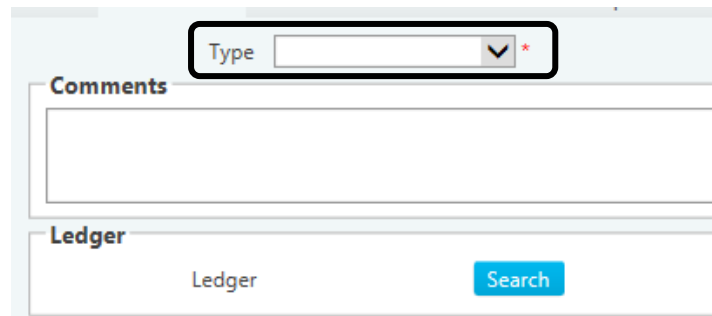
Forecast Rate Plan

4. Complete the **Distribution Channels** field to select the relevant channels within distribution you wish to expose this block to.

Distribution Channels

## Room Block Booking Tabs

1. Click on the **Guarantee** tab and select your pay type information.

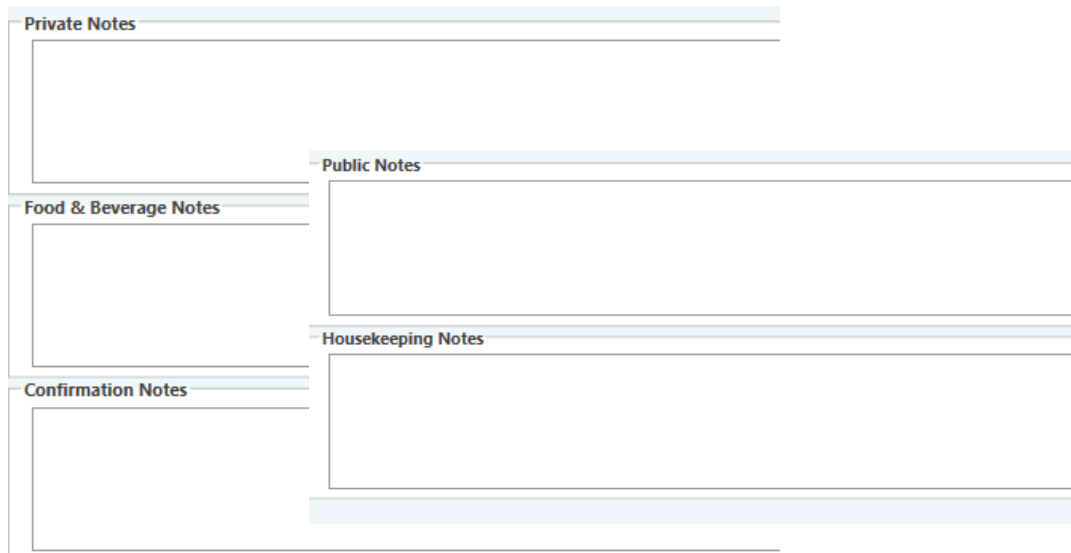


The screenshot shows a form with a 'Type' dropdown menu at the top, which is highlighted with a red box. Below it is a 'Comments' text area, and at the bottom is a 'Ledger' section with a 'Search' button.

2. Click **Save** to generate the Room Block Booking Reference.

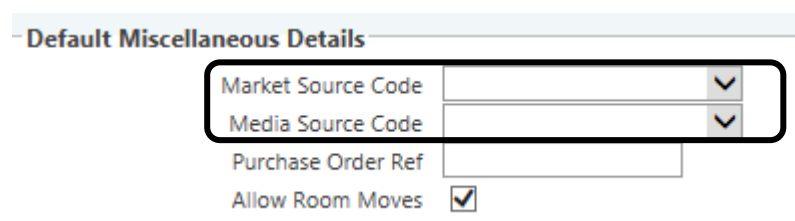
- Description: TEST19122016 Room Block Reference: GA000087  
Created by SYSTEM\_USER2 on the 19/Dec/2016 at 14:29  
Edited by SYSTEM\_USER2 on the 19/Dec/2016 at 14:29

3. Click in the **Defaults** tab to enter notes to each room, any notes populated here will copy to bedroom bookings as they are picked up.



The screenshot shows the 'Defaults' tab with several note fields: 'Private Notes', 'Food & Beverage Notes', 'Confirmation Notes', 'Public Notes', and 'Housekeeping Notes'. Each field is represented by a large empty text area.

4. Change the **Media/Market Source Code** to the relevant option.



The screenshot shows the 'Default Miscellaneous Details' section with two dropdown menus for 'Market Source Code' and 'Media Source Code', both highlighted with a red box. Below them are fields for 'Purchase Order Ref' and a checked checkbox for 'Allow Room Moves'.

- Select the **Upsells** tab this can be used at any stage prior to picking up your rooms to ensure that chosen products are posted onto the reservations as they are picked up.

Default Reservation Offers		
Description	Value	Quantity
BB Bakery afternoon Tea Tour - Adult	5	10
BB Bakery Afternoon Tea Tour - Child	0.00	

## Add/Remove Rooms

- Click the **Block** tab at the top of the screen. Click **Show Availability** to see available rooms for the night(s) selected.

**Block**

Start Date: 16/12/2016 End Date: 18/12/2016 Refresh Block Rhythm **Show Availability**

B Blocked P Picked Up R Available for Pick Up

Room Type	Ad	Ch	Inf	Fri 16/Dec/2016	Sat 17/Dec/2016
				A B P R	A B P R
No results were found to match your search					

Remove Add Combination

Main Guarantee Default Misc. **Block** Default Upsells Pick Up Rooms Guest List

**Block**

Start Date: 03/08/2016 End Date: 05/08/2016 Refresh Block Rhythm Hide Avail

Room Type	Room Type Group	Wed 03/Aug/2016	Thu 04/Aug/2016
BED_SHARE	BEDS	0	0
BED_SHARE_EN	BEDS	8	9
DOUBLE_ROOM	BEDS	11	13
ECO_TWIN	BEDS	16	16
F_1TW_3SGL	FLATS_LEVEL2	2	2
F_2TW_3SGL	FLATS_LEVEL2	9	10
F_RE_1DB_3SG	FLATS_LEVEL2	1	1
F_RE_3DB_2SG	FLATS_LEVEL2	3	4
F_RE_TW_4SGL	FLATS_LEVEL2	0	0
FL_RE_4SGL	FLATS_LEVEL2	9	9
FL_RE_5SGL	FLATS_LEVEL2	2	2
SHAF_TWIN_TR	COMBL_BEDRS	0	0
SHAFT_SINGLE	BEDS	54	54
SINGLE	BEDS	48	51
SINGLE_ENSUI	BEDS	2	2

- Add rooms by clicking **Add Combination**. This will firstly ask for the room type, and then the number of adults, children and infants. E.g. If all your rooms are for single occupancy, simply fill in the number of adults as 1, then press apply.

**Block**

Start Date: 16/12/2016 End Date: 18/12/2016

B Blocked P Picked Up R Available for Pick Up

Room Type	Ad	Ch	Inf	Fri 16/Dec/2016	Sat 17/Dec/2016
				A B P R	A B P R
No results were found to match your search					

Remove **Add Combination**

**Add Room Type**

Room Type  3EB

Ad  Ch  Inf  Blocks

If you wish to have some room types with various occupants, simply add another combination of rooms. This will add another line against the room type, or click **Add additional pax** in the original combination.

3. Add the number of rooms per room type under the **R** column

Room Type	Ad	Ch	Inf	Fri 16/Dec/2016				Sat 17/Dec/2016				
				A	B	P	R	A	B	P	R	
<input type="checkbox"/> 2EB		2	0	0	237	0	0	<input type="text" value="0"/>	237	0	0	<input type="text" value="0"/>
<input type="checkbox"/> 3EB		2	0	0	76	0	0	<input type="text" value="0"/>	76	0	0	<input type="text" value="0"/>

A = number of rooms of that type available

B = number of rooms blocked of that type (as above)

P = number of rooms picked up (at this point this will always show 0)

R = number of rooms remaining to be picked up

4. Click **Save** for the **B** column to update.

Room Type	Ad	Ch	Inf	Fri 16/Dec/2016				Sat 17/Dec/2016				
				A	B	P	R	A	B	P	R	
<input type="checkbox"/> 2EB		2	0	0	232	5	0	<input type="text" value="5"/>	232	5	0	<input type="text" value="5"/>
<input type="checkbox"/> 3EB		2	0	0	71	5	0	<input type="text" value="5"/>	71	5	0	<input type="text" value="5"/>

5. To remove one of your combinations, select the room type and click **Remove**. The following warning message appear. Click **Yes**.

Room Type	Ad	Ch	Inf	Fri 16/Dec/2016				Sat 17/Dec/2016				
				A	B	P	R	A	B	P	R	
<input checked="" type="checkbox"/> 2EB		2	0	0	232	5	0	<input type="text" value="5"/>	232	5	0	<input type="text" value="5"/>
<input type="checkbox"/> 3EB		2	0	0	71	5	0	<input type="text" value="5"/>	71	5	0	<input type="text" value="5"/>

Do you want to remove the selected Blocked Rooms?  
Please note that if you choose to remove it, the changes will be automatically saved. Also, if a room is already picked-up, it will not be removed.

## Block Rhythm

Allows you to add the number of rooms required per night in one step, rather than filling in each box individually.

1. Click **Block Rhythm** and fill in the required fields:

The screenshot shows a web interface for configuring a 'Block Rhythm'. At the top, there is a 'Block' section with 'Start Date' and 'End Date' dropdowns set to 16/12/2016 and 18/12/2016 respectively. To the right are 'Refresh' and 'Block Rhythm' buttons. Below this is a 'Block Filter' section with 'Block Value' (input: 1), 'Room Type' (dropdown: 2EB (A: 2, C: 0, I: 0)), 'Start Date' (dropdown: 16/12/2016), and 'End Date' (dropdown: 18/12/2016). The 'Cycle' section offers three main options: 'Daily' (selected), 'Weekly' (with 'Every 1 week(s) on:' and checkboxes for S, M, T, W, T, F, S), and 'Monthly' (with 'Day 1 of every 1 month(s)' and 'The first Sunday of every 1 month(s)'). At the bottom are 'Abort' and 'OK' buttons.

2. Fill in the criteria required.

- **Block Value:** Number of rooms required
- **Room Type:** Select which combination you want to fill, so if you've select a combination for 1 adult and 2 adults, it will provide a drop down for this selection
- **Start/End Date:** Which nights you wish to use the block rhythm feature for. This will default to the group start and end dates already entered.
- **Cycle:** Select one of these options: Daily, Weekly or Monthly. When using groups, the most common option would be to select daily, as this will block off the number of rooms selected above on each day of your block.

3. Click **OK**. Room summary will appear on the group main page.

### Summary

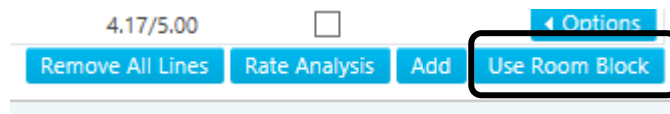
Summary Stats

Total Nights 20  
Picked Up 0  
Not Picked Up 20

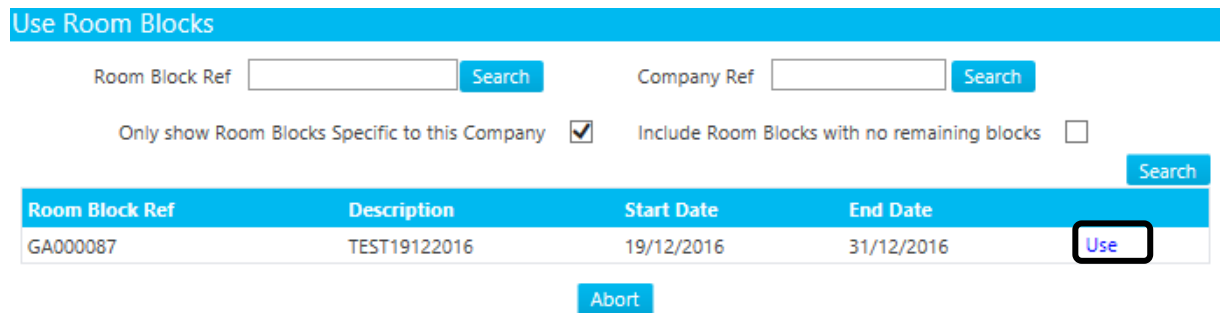
## Pick Up Rooms

To Pick up an existing booking against the room block room please refer to [\(Making a reservation\)](#)

1. Once the reservation has been created under the **Rate Plan** tab click **Use Room Block**.



2. Click Search, it will return Room Blocks active for the booking date.



3. To attached click on **Use**.
4. Once attached the **View Room Block** and **Remove Room Block** button will appear.



## Room Move Changes

There are two main ways of changing the room type of a booking whilst keeping the original room rate.

### CRS Module – Search



1. Click on the **CRS Module** icon (organisational chart).
2. From **Reservations** click **Search**.

**Advanced Reservation Search Parameters**

Property:

Property Town:

Arrival Date: 21/12/2016

Departure Date:

Creation Date:

Last Edit Date:

Creation User:

Last Edit User:

Limit:

Booking Ref:

PMS:  CRS  Virtual

Distribution Ref:

Surname:

Forename:

Post Code:

Room Type:

Company:

Booking Status:  Provisional,  Confirmed

From:

**Quick Search**

CRSBookRef	PMSBookRef	From	To	Property	RoomType	Guest	Contact	Ad	Ch	Inf	Status	
<b>CRS00167</b>	BA000183/1	21/Dec/2016	23/Dec/2016	TRAINING Bankside House	2EBA	Mr Test Booking	Mr Test Booking	2	0	0	Confirmed	<a href="#">View</a> <a href="#">Cancel</a>
CRS00167	BA000183/2	21/Dec/2016	23/Dec/2016	TRAINING Bankside House	2EBA	Miss Karen Booking	Mr Test Booking	2	0	0	Confirmed	<a href="#">View</a> <a href="#">Cancel</a>
CRS00167	BA000183/3	21/Dec/2016	23/Dec/2016	TRAINING Bankside House	2EBA	Miss Zoe Harney	Mr Test Booking	2	0	0	Confirmed	<a href="#">View</a> <a href="#">Cancel</a>

3. Click on the **CRSBookRef** to enter the booking.
4. Under the **Rate Plan** tab, click on **Options, Override**

Night Nett/Gross	Total Nett/Gross	Ignore Ledger	
41.67/50.00	83.34/100.00		<input type="button" value="View Room Booking"/> <input type="button" value="Change"/> <input type="button" value="Options"/> <input type="button" value="Allocate"/> <input type="button" value="Remove All Lines"/> <input type="button" value="Rate Analysis"/> <input type="button" value="Room Block"/> <input type="button" value="Remove"/> <input type="button" value="Room Booking"/> <input type="button" value="Override"/> <input type="button" value="Room Booking"/> <input type="button" value="Allocate"/> <input type="button" value="Options"/>
8.34/10.00	16.68/20.00		<input type="button" value="Allocate"/> <input type="button" value="Options"/>

5. Enter the rate under **Target Override Rate** (per night) and enter the **Override Reason**.

6.0 Override Rate

The Rate Plan For This Reservation (BK00007/1) Is Based On A Per Room Rate.

Current Nightly Rate (Gross) 0.00  
Current Nightly Rate (Nett) 0.00

Breakdown  
Room 0.00 Gross / 0.00 Nett  
Other Components 0.00 Gross / 0.00 Nett

Target Override Rate 15.00 Gross

Override Breakdown (Approx)  
Room 15.00 Gross / 15.00 Nett  
Other Components 0.00 Gross / 0.00 Nett

Override Reason

Abort Override

6. Click on the **Override** button, Click **Yes** to proceed.

Are you sure you want to override the rate from 204.50 to 126.50 ?

No Yes

7. **\*\*MAKE SURE ROOM IS NOT ALLOCATED\*\*** - Click **Options, Change** and select the room type you wish to give them, or select the blank space at the top of specific room type to see all options/availability.

From Date  
Specific Room Type  
Specific Rate Plan  
Show Cost As  
Market Segment  
Company  
Promotional Code

1CB (1CB)  
1EB (1EB)  
2EB (2EB)  
2EBA (2EBA)  
3EB (3EB)  
G2EB (G2EB)  
G4EB (G4EB)  
GWFFD1E (GWFFD1E)  
GWRDC (GWRDC)  
WFDE (WFDE)  
WFFD1E (WFFD1E)  
WJDE (WJDE)  
WR1E (WR1E)  
WRCDL (WRCDL)  
WRDC (WRDC)  
WRDE (WRDE)  
X1EB (X1EB)

Nights 9  
Adults 1  
Children 0  
Infants 0

Hide When Restricted By

Only Show Rate Plans Specific To This Com

Abort

8. Select the new Rate Plan if applicable for the room type you wish to change it to, then click on the new choice.

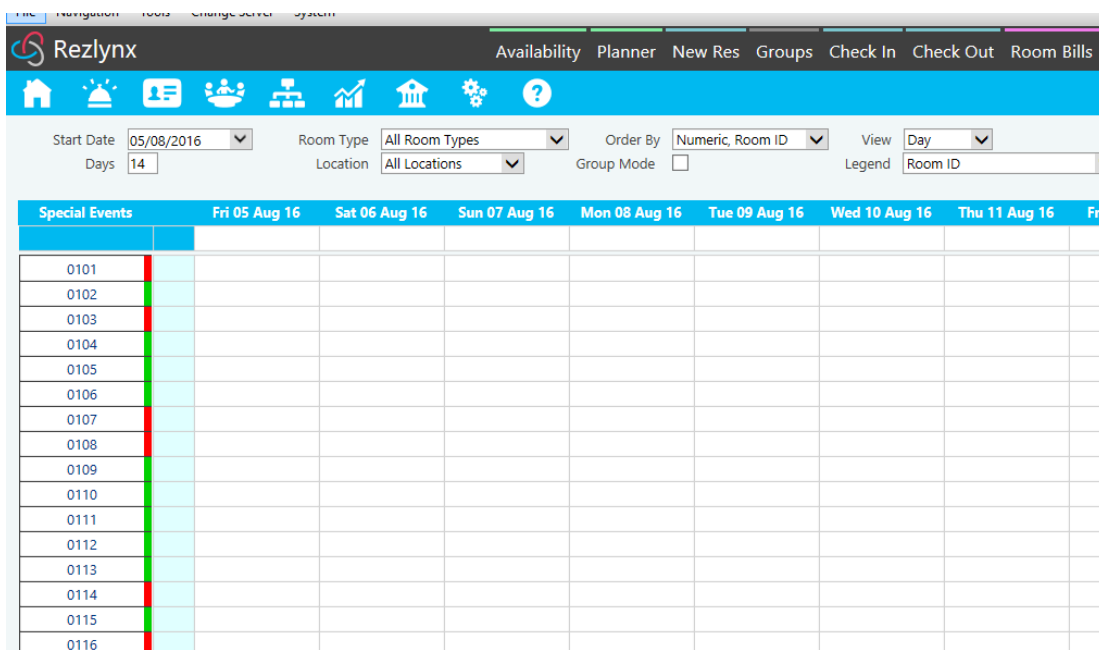


## 9. Save.

### Guest Journey – Planner

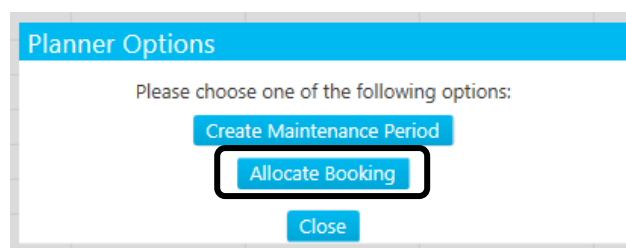


1. Click on the **Guest Journey** icon (bell)
2. From **Property** click on **Planner**.
3. Chose the date range you need to amend.



Special Events	Fri 05 Aug 16	Sat 06 Aug 16	Sun 07 Aug 16	Mon 08 Aug 16	Tue 09 Aug 16	Wed 10 Aug 16	Thu 11 Aug 16	Fri
0101								
0102								
0103								
0104								
0105								
0106								
0107								
0108								
0109								
0110								
0111								
0112								
0113								
0114								
0115								
0116								

4. Click on a room number that is the type you wish to move your booking(s) to.



5. Click **Allocate Booking**. You will then get a list of all unallocated rooms for that day.

- Click **Allocate** on one you want to change

Possible Allocation Results

Reservations matching selected Room Type (1CB - Level 1)

Name	Company	BookRef	Arrival	Departs	From	To
No results were found to match your search						

Reservations not matching selected Room Type

Name	Company	BookRef	Arrival	Departs	From	To	RoomType	Combination
Booking Miss Karen		BA000183/2	21/12/2016	23/12/2016	21/12/2016	23/12/2016	2EBA	Level 1
Booking Mr Test		BA000183/1	21/12/2016	23/12/2016	21/12/2016	23/12/2016	2EBA	Level 1
Harney Miss Zoe		BA000183/3	21/12/2016	23/12/2016	21/12/2016	23/12/2016	2EBA	Level 1

Close

- If the room type you are selecting is a different rate, then the below will pop up. Select **Retain Original Rate** and **Confirm**. (If there is no change in rate this will not show).

Allocation Confirmation

Rates Changed

Line	Rate Plan	Original		New	
		1st Night Nett/Gross	Total Nett/Gross	1st Night Nett/Gross	Total Nett/Gross
1	BAR_CB	66.67/80.00	66.67/80.00	83.33/100.00	83.33/100.00

NOTE: Any future changes to rate related reservation details will re-calculate all rates from the current day based on the new room type.

Do you wish to override the unavailable reasons?

Abort Confirm

Retain Original Rate   
Use New Rate

Repeat this process with all other rooms you wish to move.

## Allocating

### CRS Level

When creating a booking at CRS level the rooms booked can be allocated at this stage.

To allocate a room within the booking there are two ways:

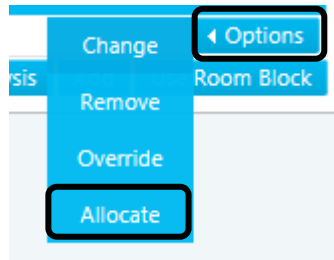
- Click on the **Allocate** button to the bottom right hand side of the rate plan tab within the segment.

Total Nett/Gross

210.84/253.00

Allocate Remove All Li

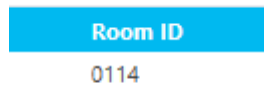
- Secondly you can select the **Options** button to the right side of the rate plan tab within the segment and select the **Allocate** button.



- After clicking, the **Allocations Possibilities** pop up box will appear.
- Click on the **Allocate** button beside the room number you wish to allocate.

	Room ID	Room Sub Group	House Keeping Status	Room Status	Notes
Allocate	0114	FIRST	Full clean/sheet change	Vacant	
Allocate	0117	FIRST	Stayover	Vacant	

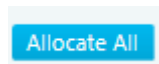
- Once selected the room will appear in the Room ID section under the Rate Plan segment.



### PMS Level



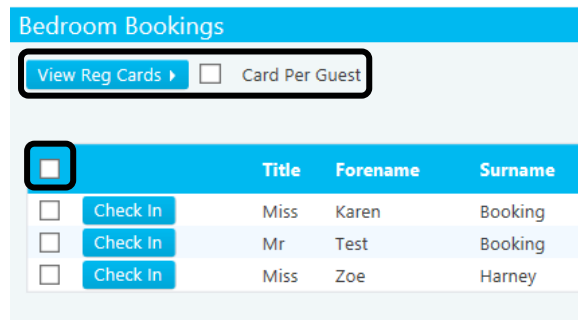
- Click on the **Guest Journey** icon (bell).
- From **Front Office** click on **Allocate/Un-allocate**.
- There are 3 ways to allocate rooms from this screen:
  - Allocate All – allocates all rooms at once
  - Manual Allocate – allows you to allocate per room and choose the room
  - Auto Allocate – allocates automatically per room



### Printing Registration Cards



1. Click on the **Guest Journey** icon (bell).
2. From **Front Office** click on **Check In**.



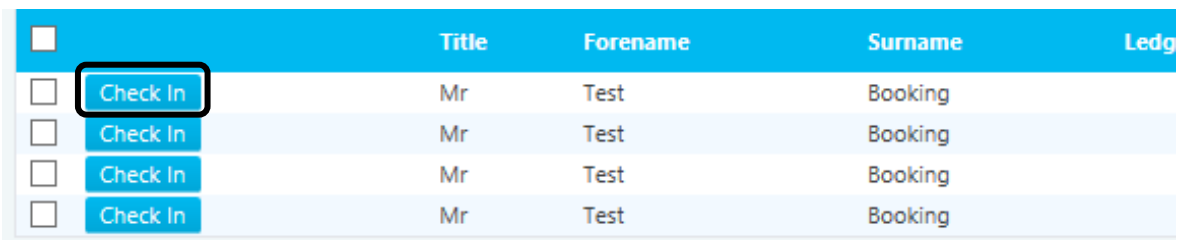
3. Tick the top box to select all bookings.
4. Click on **View Reg Cards**.
5. Select **Direct Print** to send to the printer.

If multiple profiles are linked for a reservation, you can print a card per guest by selecting **Card Per Guest**

### Check In



1. Click on the **Guest Journey** icon (bell)
2. From **Front Office** click on **Check In**.
3. Select the **Check In** button on the booking line you wish to proceed with.



4. Check the summary to ensure that all the information is correct. i.e Amount of the stay/Deposit Paid & Remaining Balance.

Check In Confirmation		Misc
<b>Summary</b>		
BookRef	BK00241/1	
Room	0120	
Arrival	25/Aug/2016	
Departure	26/Aug/2016	
Room Type	DOUBLE_ROOM	
ETA	00:00	
Market Segment	SUMM	
Media Source	WEB	
Total For Stay	89.25	
Deposit Paid	0.00	
Remaining Balance	89.25	
Company		
Agent		
Source		

5. You can view notes added to the reservation and add any additional notes you wish to make.

Private Notes	Public Notes
<div style="border: 1px solid black; height: 40px;"></div>	<div style="border: 1px solid black; height: 40px;"></div>
Food & Beverage Notes	Housekeeping Notes
<div style="border: 1px solid black; height: 40px;"></div>	<div style="border: 1px solid black; height: 40px;"></div>

6. Under **Folios**, stores the guest name(s) and you have the options to edit the profile or unlink the profile.

Folios				
Folio Name	Folio Id	ETD	Value	Payment Type
Mr Test Booking <span style="border: 2px solid black; border-radius: 50%; padding: 2px;">Options</span>		00:00	0.00	Please select... <span style="float: right;">▼</span>

7. You can **Set Alarm Call** and **Update Credit Limit**.

Options	
Set Alarm Call	<input type="text" value="00:00"/>
Update Credit Limit	<input type="text" value="0.00"/>
Update Interface Posting Mode	All Allowed <span style="float: right;">▼</span>

8. Click on the **Confirm** button.



9. A message will appear confirming the Check In.

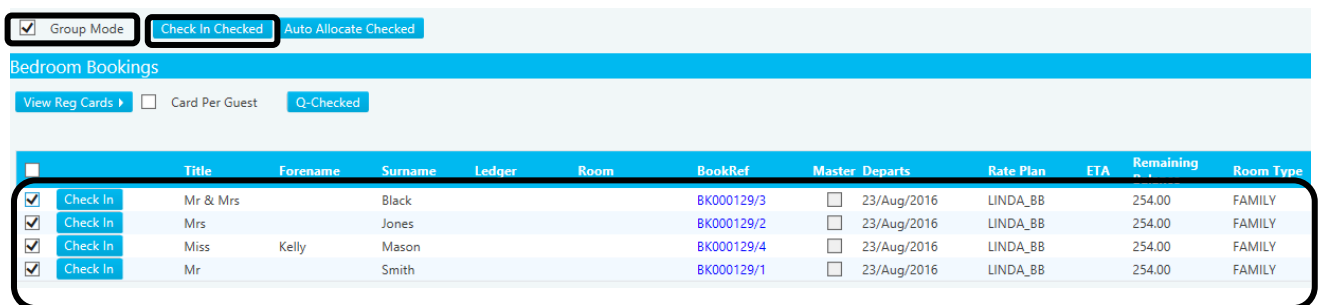
From this screen you can either:

- Click **Back** to go to the Check In screen again.
- Click back into the actual **Reservation**.
- Click onto the room's **Room Billing** screen.

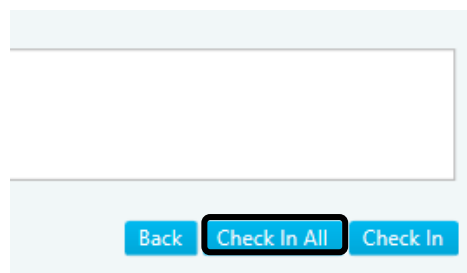


You can also perform a group check in or choose multiple guests to check in at once.

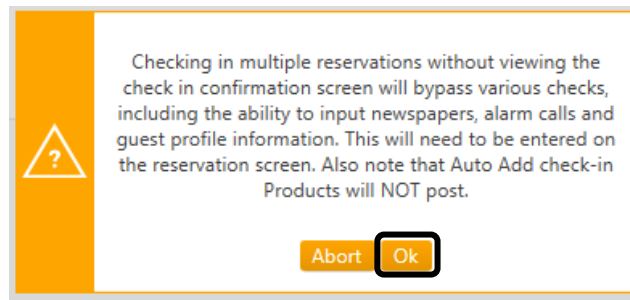
1. Click on group mode and click on one guest in a group/multi-room, alternatively you can just tick multiple guests.



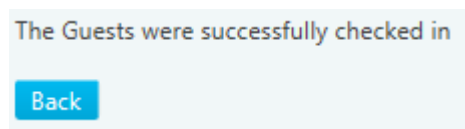
2. Please select **Check in Checked**, the system gives you the option to **Check in** each guest individually or **Check in All**



3. **Check in All** will bypass the Check In Summary screen and Rezlynx will display a warning to advise all the areas of the system you are choosing to bypass.



4. Once you select **OK** the following message appears.



## Q-Rooms



1. Click on the **Guest Journey** icon (bell).
2. From **Front Office** click on **Check In**.

## To place a room on the Q-Room report

1. Select your check in by ticking the box.
2. Select **Q-Checked** this will place a Q on the check in line.

Bedroom Bookings						
View Reg Cards ▶ <input type="checkbox"/> Card Per Guest <input checked="" type="checkbox"/> Q-Checked						
<input type="checkbox"/>		Title	Forename	Surname	Ledger	Room
<input checked="" type="checkbox"/>	Check In	Miss	Linda	Gijsbertsen	Q	1
<input type="checkbox"/>	Check In	Miss	Linda	Gijsbertsen		2
<input type="checkbox"/>	Check In	Miss	Linda	Gijsbertsen		5
<input type="checkbox"/>	Check In	Miss	Linda	Gijsbertsen		8

## To view your Q-Room Report

1. Click on the **Guest Journey** icon (bell).
2. From **Front Office** click on **Q-Rooms**.

BookRef	Q-Time	Room ID	Room Type	Lead Name	BK Status	VIP	ETA
BK000130/1	15:24	1	DOUBLE	Miss Linda Gijbetsen	Provisional		00:00

## Removing your room from the Q-Room report

1. Select **Change** this will take you into your reservation search screen.
2. Un-allocate the room number by selecting **Un-Allocate**.

## Room Billing



1. Click on the **Guest Journey** icon (bell).
2. From **Front Office** click on **Check Out** or from **Billing** click on **Room Billing**.
3. To checkout a Guest use either Check-out or Room Billing.

The Check-out screen lists those guests departing on that day.

			Room	Title	Forename	Surname	BookRef	Com
<input type="checkbox"/>	Print	Room Billing	116	Miss	Test	Booking	BA000182/1	
<input type="checkbox"/>	Print	Check Out	117		Zoe	Harney	BA000182/2	
<input type="checkbox"/>	Print	Check Out	124		Denis	Hurley	BA000182/4	
<input type="checkbox"/>	Print	Check Out	138		Eliot	Kelly	BA000182/6	
<input type="checkbox"/>	Print	Check Out	139		Phillip	Marzcek	BA000182/7	
<input type="checkbox"/>	Print	Check Out	154		Bev	Scott	BA000182/5	
<input type="checkbox"/>	Print	Check Out	123		Chris	Wormald	BA000182/3	

The Room Billing Screen lists the same guests but also those residents who are due to depart later in the week.



The following options will be available within the room billing screen.



### **Add Payment**

Allows you to process a payment from a guest.

### **New Charge**

Allows you to add new charges to the guest folio.

### **Options**

- *Amend* - any charges that have already been charged to the folio.
- *Delete* – refund any charges that have been incorrectly posted.
- *Split* – split an existing charge to be able to transfer to an additional folio or room.
- *Edit Description* – change the description of the charge as it appears on the folio.
- *Group Transactions* - take three individual charges to appear as one. Note this can only be done if the charges are posted on the same date.
- *Ungroup transactions* – reverse the above transaction.

### **Transfer To**

- *Room* - transfer an existing charge to another room, *Folio* – transfer an existing charge to a second folio within the room
- *Bill Split* - Transfer an existing charge to a second person folio or to transfer bill items to a second bill split

Additional options available include:



### **Show individual view**

Shows the total amount on the folio grouped by bill splits and folios.

### **Options**

Shows Central Account reprint and auto poster to post charges for the remainder of the stay

### **Assign Ledger Acc**

If the bill is going to be sent back to the company. This may already have been set up at the time of reservation or check in.

**Print**

Allows you to select which folio or bill split you want to print.

**Check Out \*\* CIM incorporated\*\***

Payment Required from Guest/Booker

If a room has still a balance to be paid as per below. Click on **Add Payment**.

Room Folio Transactions

Bill Split 1

<input type="checkbox"/>	Operator	Posted Date	For Date	Code	Description	Folio	Gross Each	Qty	Total
<input type="checkbox"/>	*AUTO*	31/05/2016 14:16:31	31/05/2016	TERM_RENT	FionaBB rate	1	126.50	1	126.50
<b>Room Folio Total</b>									<b>126.50</b>

Add Payment   New Charge   Options   Transfer To

Select the relevant pay type that the guest/booker is wishing to pay by. Enter the amount or you can select **Auto** to auto fill in. Click the **Post** button at the bottom right of the box.

Room Add Payment

The outstanding balance for room 0301A , folio 1 , bill split 1 is 126.50

	Payment Code	Description	Comment	
Auto	Remainder	BACS	BACS	0.00
Auto	Remainder	CASH	Cash	0.00
Auto	Remainder	CC_COMMS	CC Commissions	0.00
Auto	Remainder	CHEQUE	Cheque Payment	0.00
Auto	Remainder	CHEQUE_REF	Refunds by Cheque/Bacs	0.00

**1. Payment to the Ledger Account – PMS Level**

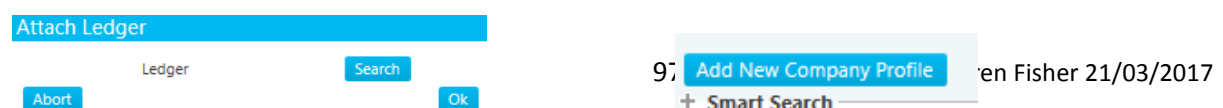
If the booking has not yet been assigned to a ledger account, click on the **Assign Ledger Acc** button at the bottom right



Click on **Aged Debtors & Search**.



You can either then **search** for an existing profile, if the profile does not exist and you have the access and detail you can **Add New Company Profile** here.



When you find the company you wish to attach for the ledger account click on the Company Ref number

Company Ref	Company Name
GUESTLINE	Guestline Ltd

Attach Ledger

Ledger GUESTLINE Remove

Abort Ok

This will create a Ledger Folio within the room billing for that room. Select transactions, click transfer to and Aged Debtors.

<input type="checkbox"/>	SYSTEM_USER	05/01/2017 12:00:41
<input type="checkbox"/>	*AUTO*	17 00:10:04
<input checked="" type="checkbox"/>	*AUTO*	17 00:10:05
<input checked="" type="checkbox"/>	*AUTO*	17 00:10:04
<input checked="" type="checkbox"/>	*AUTO*	17 00:10:05

Room Folio Total Bill Split 2

Add Payment New Charge Options Transfer To Quick Print

## 2. Payment to the Student Account – CIM Level

- Click on the **Assign to Ledger Acc** button.
- Click on **Central Account**. Click **Search**.

- You can either **Add New Account** or **Search** for an existing one.

When you find the company you wish to attach for the ledger account click on the Account Ref number

Account Ref	Account Name
HARN_TEST	Harney Test Account
PF00002	Harney
ZOE_COMP_01	Zoes Company

This will create a Central Ledger Folio within the room billing for that room. Transfer any charges from the bill to the Ledger if applicable

[New Charge](#) [Transfer To](#)

Once you are happy that all charges are correct and payment has been taken (remember if this is by credit card this will need to go through the pdq machine), you can go ahead and check out.

Rooms cannot be checked out if they still have a balance on them.

Once you have clicked on Checkout

Title	Forename	Surname	Company	Room	BookRef	Arrival Date	Departs	Tariff	ETA	Room Type
Mr	Test	Booking		0117	BK00115/1	10/May/2016	14/Jun/2016	GRP1BB	00:00 AM	DOUBLE_ROOM

Private Notes

Public Notes

Food & Beverage Notes

Housekeeping Notes

Cancel
Confirm

You will be asked to confirm, once confirmed you will not be able to make any amendments or changes to the folio. Prior to confirming the check-out, you can update any notes, they will not update the profile but will remain within the reservation for future reference.

## NRAs

NRA stands for 'Non Residential Account'

These are often referred to as dummy room or management account.



1. Click on the **Guest Journey** icon (bell).
2. From **Billing** click on **NRAs**.
3. Click on **Create** to begin.

Create		
Booking Ref	Description	Name
BK000119	See reference 12343- jon gil	Mr Jon Gil
BK000124	Car Parking Bankside House	Car Parking Bankside - October

4. Enter the **NRA Description**.
5. Enter the **NAME** and options/link the profile if possible.
6. Complete the **Market Segment & Media Source**.

The screenshot shows the 'NRA' form with the following fields and values:

- NRA Description: Management Account
- Name: Management Account (with an 'Options' dropdown)
- Market Segment: Internal Use
- Media Source: INTERNAL [Internal Use]
- Interface Postings Mode: All Allowed
- Credit Limit: 0.00
- PO Ref: C/O CEO

Buttons for 'Abort' and 'Save' are visible at the bottom.

7. Select the **interface posting mode**.
8. Input **credit limit**.
9. Complete the **purchase order number** if required on the invoice.

This screenshot is similar to the previous one, but the 'Interface Postings Mode' dropdown menu is highlighted with a black box, showing the 'All Allowed' option selected.

10. Click **Save** to create the NRA.

You can have multiple accounts open at any time

Booking Ref	Description	Name	Market Segment	Media Source
BK000119	See reference 12343- jon gil	Mr Jon Gil	HOUSE	TELEPHONE
BK000124	Car Parking Bankside House	Car Parking Bankside - October	HOUSE	WALK_IN

11. You can edit your NRA account information at any time by selecting **Edit**.

12. To open your NRA account for posting charges, please select **Billing**.

Interface Posting Mode	Credit Limit	PORef	Balance		
All Allowed	150.00		0.00	Edit	Billing
All Allowed	150.00		0.00	Edit	Billing

## Reconciliation

### Banking Reconciliation Explanation

#### Banking reconciliation in Rezlynx

Moving from Opera to Rezlynx will introduce a number of changes to the way we process payments for bookings in Residential Services.

This is the proposed method of reconciling the different methods of receiving payments.

### Payments in Halls

#### **Cash**

Cash payments will be accepted in the halls at reception only. Students wanting to pay term fees by cash will be given a bank giro credit form and asked to take their cash to the bank.

Receptions staff will cash up at the end of their shift. They will balance the cash in their till to the cash figure entered in Rezlynx.

#### **Card Payments**

We have a number of routes for payment by cards each will be processed slightly differently

#### **Payments in person**

A customer wanting to pay by card in person will have the payment processed in Rezlynx using Payment Express chip and pin devices. These devices are linked to a MID per property. Reception staff will check Chip and Pin payments processed in Rezlynx against payments process by First Data as part of their cashing up procedure.

#### **Bookings process via OTAs**

Some OTAs provide a virtual credit card with the booking made online. The reception staff in the hall will log in to the OTA's extranet to obtain the virtual card details on the day of arrival so they can process the card payment in Rezlynx. The payment will be processed using the MOTO MID for that

particular hall. These payments will appear on the reception staff's cashing up report. The reception staff member will check this amount against the total processed by secure trading MOTO MID at that hall for that day.

## **Payments processed by the CRT**

### ***Card Payments***

#### ***Bookings process via OTAs***

Bookings through some OTAs pre authorise the card payment and pass a secure trading token with the reservation. Our central sales staff then login to the secure trading virtual terminal to process the payment using the ST token. Each sales staff member will have their own ST VT login. At the end of their shift they will print a list of payment taken using their ID and compare this to their cashing up sheet. The log in details for the central staff will be linked to a central MOTO MID.

#### ***Payments over the telephone***

Only the central reservation team will process payments over the telephone. Payments will be processed by the magnetic north system. The sales agent will past the payment using the Telephone Payment pay type. At the end of their shift they will ensure the total of payments posted in Rezlynx matches the total processed by magnetic north for that day.

#### ***Automatic payments processed online***

Bookings processed online via our own booking engines process card payment automatically. These will use a central ECOM MID. The booking engines are

- LSE Vacations
- Summer School
- Faculty Accommodation
- Hallpad deposits
- Student Payments portal

At the end of each day or the next day a check is made between the amount posted in Rezlynx and the amount authorised by ST for the central ECOM MID for that day. This is will be done by the CRT shift leader.

#### ***Student Bank Transfers via the payment portal***

Term time students and summer school students are offered a method of paying by bank transfer. They are offered a Western Union quote which can be used to pay the fees in a local currency but guarantees we receive the correct sterling amount. Bank payments that appear in the residences bank account are identified by the central cashiers and the payment is entered in to Rezlynx by the central reservations team or residences fees. The payment should be processed automatically but at the moment this process is failing it is hoped to improve this mechanism as part of the move to Rezlynx.

#### ***Payments by Invoice***

A number of groups pay on invoice. The central reservations team will generate an invoice in Rezlynx and send this out to the group co-ordinator. When the payment is received in the bank account the cashiers notify central reservations team to post the payment in Rezlynx.

### ***Cashing up***

#### ***Reception staff***

Halls reception staff will use the Rezlynx cashing up reports to get a shift total for

- Cash
- Payments in person
- Payments processed via ST in Rezlynx.

#### ***Central reservation staff***

Central reservation will need a report that shows for each user

- Payments process via ST across all halls
- Bank transfer payments across all halls
- Automatic payments processed online

#### ***Payment types in Rezlynx***

In order to reconcile we will need a number of different payment types in Rezlynx.

Cash – Cash payment over the counter

BACS – Bank transfer received in to bank account

GIRO – Cash payment made at a bank

Card types

- Bank Card Automatic Online (website processed payments)
- Bank card Chip and Pin (payment in person)
- Bank Card processed manually (via virtual terminal in Rezlynx) (Agoda payments)
- Bank card using ST ref (via ST website outside Rezlynx) (Bookings.com and laterooms)
- Bank Card over the telephone (magnetic north processed payments)

#### ***Refunds and Chargebacks***

Refunds will be processed by the CRT shift leader. Any refund request will be authorised by the CRT manager before being actioned. The CRT shift leader will have access to all the ST MIDs so they can search for transactions by the transaction reference across all MIDs.

Chargebacks requests will be managed by the CRT manager. All chargeback requests from any card processor will be forwarded to the CRT manager so they can investigate the claim. The claim will then either be authorised by the CRT manager for processing or challenge with the payment processor using the agreed process.

#### ***Rezlynx will be configured with the following MIDs***

Central ECOM ST MID – for processing online payments from all websites

Central MOTO ST MID – for processing payments made by CRT from bookings.com and Laterooms also used for Magnetic north payments.

Per property MOTO FD MID – for processing payments in person

Per property MOTO ST MID – for processing payments at reception using virtual cards (agoda)

#### ***Glossery***

OTA - Online Travel Agent



MID - Merchant ID

ST – Secure trading card payment provider for online payments

FD – First data card payment processor for chip and pin payments

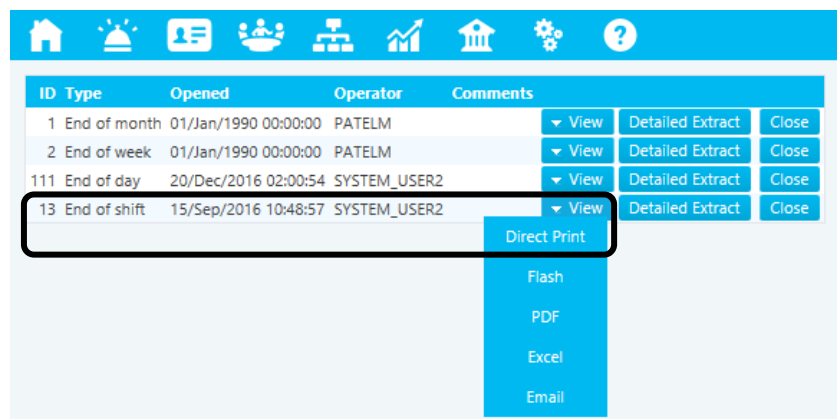
CRT – central reservation team

## Steps to Reconcile each shift

### End of Shift



1. Click on the **Accounting** icon (bank).
2. From **Period End** click on **Current Periods**.
3. Click on **View** beside **End of Shift**.



ID	Type	Opened	Operator	Comments			
1	End of month	01/Jan/1990 00:00:00	PATELM		View	Detailed Extract	Close
2	End of week	01/Jan/1990 00:00:00	PATELM		View	Detailed Extract	Close
111	End of day	20/Dec/2016 02:00:54	SYSTEM_USER2		View	Detailed Extract	Close
13	End of shift	15/Sep/2016 10:48:57	SYSTEM_USER2		View	Detailed Extract	Close

4. Click on **Direct Print** to have the report to hand.
5. Look for the **Payment Totals** section.

NEWSPAPER	Newspapers	0.00	0.00	0.00
SUNDRIES	Sundries	0.00	0.00	0.00
<b>SUNDRIES</b>	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Totals</b>		<b>1332.62</b>	<b>266.58</b>	<b>1599.20</b>

### Payment Totals

Code	Description	Ledger CC Gross Total	Non Ledger CC Gross Total
AMEX	American Express	-420.00	
VOUCHER	Voucher Payment	0.00	
BACS	Bacs		-590.00
CASH	Cash		0.00
CHEQUE	Cheque		-60.00
ELECTRON	Electron		-90.00
MAESTRO	Maestro		-305.00
MASTERCARD	Mastercard		-150.00
PCI_WEB	OBM Online Payment		0.00

Page 1 of 3 at 09:27 on the 02/Aug/2016

LINDAG

6. Match your Cash, BACS, Cheque payments first.



7. Click on the **Accounting** icon (bank).

8. From **Period End** click on **Payment Analysis**.

This allows you to view all the individual transactions should you have a discrepancy.

9. Select the **Start/End Date & Time period**.

Start Date	25/08/2016	▼	00:00	▼	Operator	<input type="checkbox"/>	▼		Show By	Operator	▼
End Date	25/08/2016	▼	23:59	▼	Payment Type	<input type="checkbox"/>	▼				

▼ View

10. Select the **Operator**.

11. Select the **Payment Type**.

12. Click on **Refresh**.

13. Cross match all payments to locate the imbalance.

If there is an imbalance e.g. £100.00 more on Visa card, and £100.00 less on MasterCard you need to correct this within the system.

1. Go to the **Guest Journey** icon (bell).

2. From **Billing**, click on **Post Cash**.

Code: Please select...  
 Description:   
 Comments:   
 Pay Type: Please select...  
 Quantity: 1  
 Value Each: 0.00  
 Amount: 0.00  
 Post

3. Select the code as accommodation.
4. Enter a description similar to what is opposite.
5. Select the Payment type of which you shall be refunding.
6. Enter the value as a minus figure.
7. Remember to click on View to direct print this so you can attach it to with your banking.
8. You then need go to your cashiering report under the bank – operator shifts report and review your banking balance. All personnel or shifts you have balanced can be ticked and viewed/printed.

**Period End**

- Current Periods
- Operator Shifts**
- Payment Analysis
- Period End Archive

Shifts Closed From: 12/01/2017 00:00  
 Shifts Closed To: 13/01/2017 00:00  
 Operator:   
 Status: Open & Closed  
 Order By: Opened

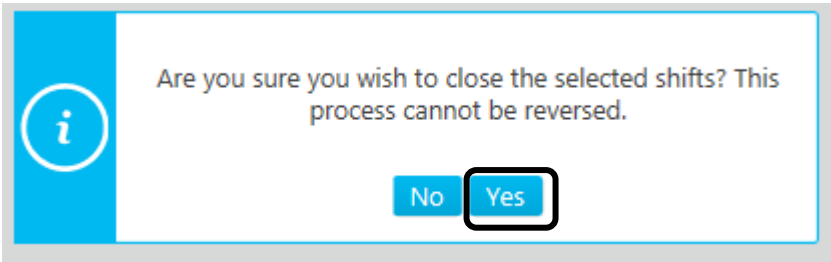
**View Payment Analysis for selected shifts**

Payment Type:   
 Transaction Source:   
 Summary:   
 View

	ID	Operator	Operator Description	Opened
<input type="checkbox"/>	80	RATRAD	Davinder Ratra	11/01/2017 09:41:23
<input type="checkbox"/>	81	SYSTEM_USER2	Guestline 2	11/01/2017 09:41:46
<input type="checkbox"/>	83	ANDERSONR	Richard Anderson	11/01/2017 09:43:09

9. Once all balances you can tick the boxes for operators balanced, then click **Close Selected Shifts** and click **Yes**.

Close Selected Shifts



10. Once the Operators shift(s) have been closed the new shift for that person opens as and when they take their first payment.

**PMS Reports**

Most used reports within Rezlynx

**Housekeeping**

- Cleaning Forecast
- House Status
- Room Maintenance
- Room Status

*Notes*

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**Front of House**

- Guest List
- Room Move
- Meal Plan

*Notes*

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**Reservation**

- Cancellations
- Daily New Reservations
- No Shows

*Notes*

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**Revenue**

- Actual & Forecast
- Rate Override
- Revenue By

*Notes*

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**Forecast**

- Revenue by Market Segment
- Future Reservations

Notes

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**Sales & Marketing**

- Booking Source
- Design Query

Notes

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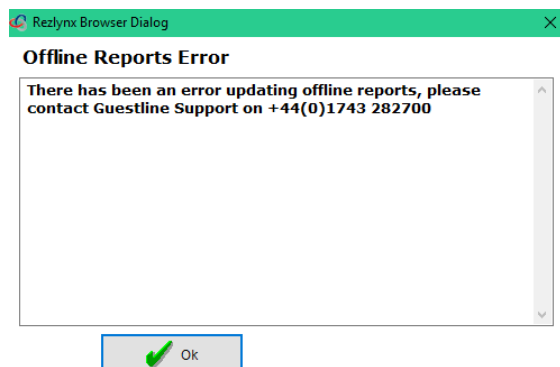
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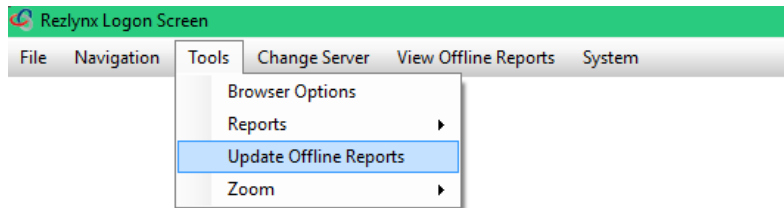
**Offline Reports**

Offline reports are an emergency back-up system. They should only be displayed and used in the event that you lose your Internet Connection.

This back-up facility is installed onto a minimum of 2 PC's per property and will be labelled with a sticker with the Guestline logo saying 'Offline Reports', in the event of a failure they will contain the most current information on each of the 'Offline Reports'. Rezlynx will do continuous updates to the 'Offline Reports' in the back ground. Should your system have not updated the 'Offline Reports' within a 24-hour period you will have an error pop up on the screen to advise you they are not updating. Please call support if you experience this error.



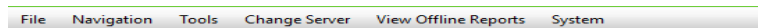
You are able to manually update these reports, should you wish, by selecting the option Update Offline Reports within tools.



The reports available are as follows;

- Room Balances
- Arrivals
- Departures
- Residents
- Availability (for the next 10 weeks)  
Room Status

You are able to use these reports to guide you through a period Manual Operation until you regain access to the internet. See screen view below.



Welcome to Advanced C&B 1.474 Site B Logon



Room type available for 12/Jul/2016 - 10/Sep/2016

Room Type	Group	Tue 12 Jul 2016	Wed 13 Jul 2016	Thu 14 Jul 2016	Fri 15 Jul 2016	Sat 16 Jul 2016	Sun 17 Jul 2016	Mon 18 Jul 2016	Tue 19 Jul 2016	Wed 20 Jul 2016	Thu 21 Jul 2016
CLAS_DBL	BEDROOM	2	2	2	1	0	2	1	2	2	2
STD_DBL	BEDROOM	3	5	5	5	0	4	4	3	4	4
TWIN	BEDROOM	1	1	1	1	0	0	0	1	1	1
		Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu
Total Avail		6	8	8	7	0	6	5	6	7	7
Deductions		0	0	0	0	0	0	0	0	0	0
Total Avail Less Deductions		6	8	8	7	0	6	5	6	7	7
Total Letting		2	0	0	1	8	2	3	2	1	1
ROOMS		0	0	0	0	0	0	0	0	0	0
DFS		0	0	0	0	0	0	0	0	0	0
Total Stock		8	8	8	8	8	8	8	8	8	8
Occupancy%		25	0	0	12	100	25	38	25	12	12
Function Rooms		0	0	0	0	0	1	0	0	0	0
Products		0	0	0	0	0	0	0	0	0	0

## Logs



1. Click on the **Help** icon (question mark).
2. **PMS Logs** or **CRS Logs**.

The 'Logs' section is used to audit system activity; this section is further broken down by the following logs:

**Groups/Room Blocks Log** - provides an audit of most group and room block activity; the report is used to audit a specific group or room block.

**Reservation Log** - provides an audit of most reservation activity; the report is used to audit a specific reservation.

**Restrictions Log** - provides an audit of most restriction activity; the report is used to audit a specific restriction.

**System Log** - provides an audit of most system activity; the report is used to audit a specific action



## System

### Analysis Codes



1. Click on the **CRS Module** icon (organisational chart).
2. From **Configuration**, click **Analysis Codes**.

Defines what charges can be added to a guest's bill.

They are grouped together into 'Analysis Groups' for ease of location and reporting purposes.

3. Click **New Analysis Code**.

New Analysis Code

4. Select the **Analysis Group**.
5. Enter the **Analysis Code/Description**.

**Analysis Code**

Analysis Group	Bars	▼
Analysis Code	<input type="text"/>	
Description	<input type="text"/>	
Tax Rule	Exempt from TAX [EXEMP]	▼
Usage	No Restrictions	▼
Revenue Type	Other	▼

Include All Properties  [Select Properties](#)

[Save](#)

Please consider the impact that adding a new entity will have on interfaces. For example Financial Export / Sage

6. Select the **Tax Rule**.
7. Select the **Usage** options are:
  - Internal Postings Only (charges to the analysis code can be made from within PMS)
  - External Postings Only (charges to the analysis code can be made from a third party)
  - No Restrictions (internal and external postings are allowed)

8. Select the **Revenue Type** options are:

- Accommodation
- Food & Drink
- Other

9. Click **Save**.

## Attributes



1. Click on the **CRS Module** icon (organisational chart).

2. From **Configuration**, click **Analysis Codes**.

3. Click **New Attribute**.

New Attribute

4. Select the **Attribute Group**.

5. Enter the **Attribute Code/Description**.

**Attributes**

Attribute Group	Account Attributes	▼
Attribute Code	<input type="text"/>	
Description	<input type="text"/>	
Field Type	Date	▼
Default Value	21/12/2016	▼

Save

6. Select the **Field Type** i.e. Yes/No, Small Text Box.

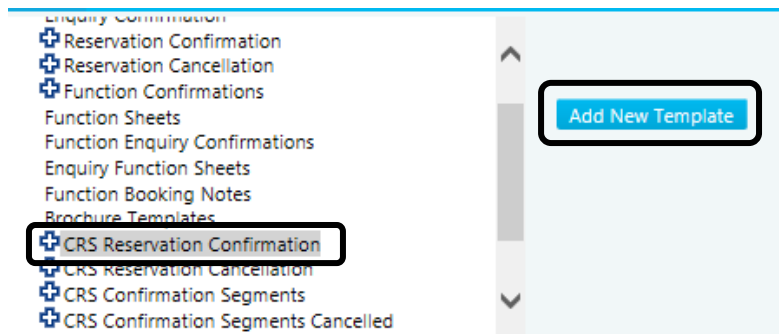
7. Click **Save**.

## Templates

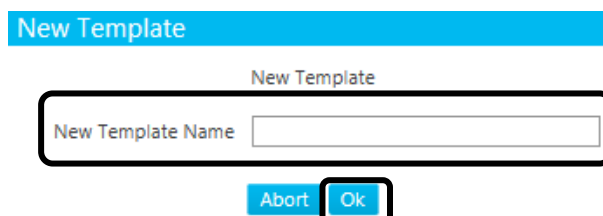
### Creating a Template



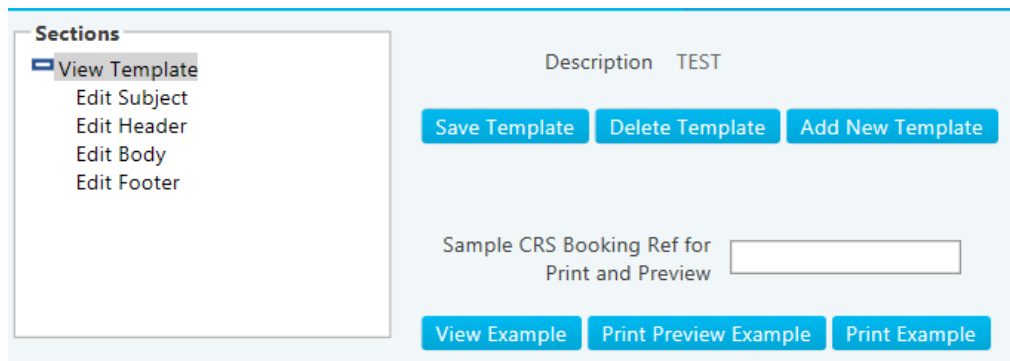
1. Click on the **CRS Module** icon (organisational chart).
2. From **Configuration**, click **Template Editor**.
3. Select the section to create your template under.
4. Click **Add New Template**.



5. Enter the **New Template Name**.
6. Click **Ok**.

A dialog box titled 'New Template' with a blue header. Below the header, there is a text input field labeled 'New Template Name'. At the bottom of the dialog, there are two buttons: 'Abort' and 'Ok' (highlighted with a black box).

Then this will display the new template (as shown below)



Within the Sections area, select the section of the template to be updated: There are four sections of a template that can be updated:

- Subject
- Header
- Body
- Footer

### **Subject Field**

The subject field is only used when creating either an email or fax template

The text added to this section will appear in the message subject line for emails or faxes.

### **Header Field**

The header field is used to start creating your template – usually the beginning of your template – on the right hand side there are tags which populate for this area that you can add in.

### **Body Field**

The body field is where the body of your template needs to be written up. There are more tags in this section as it will be the main part of your template.

### **Footer Field**

The footer field is where you end your template. There are also tags provided to put in this area too.

### **Segment Templates**

When creating a template CRS segments can be created separately should they need to be used more than once. Creating these allows for the segments to be pulled into the main template.

CRS Reservation Cancellation  
 CRS Confirmation Segments  
 ARRIVAL  
 CONFIRMATION  
 DEPARTURE  
 CRS Confirmation Segments Cancelled  
 CRS Enquir

**emplate Details**

**B I U** [List Icon] [List Icon] [List Icon] [Color Icon] [Font] [Size]

**Guest name:** %ROOMLEADTITL  
**Prestige booking reference:** %CRSBookRef%  
**Number of Guests:** Adults: %ADULTS%  
**Apartment type:** %ROOMTYPE%  
**Arrival Date:** %ROOMARRIVE%  
**Departure Date:** %ROOMDEPART%  
**Check In Time:** %CHECK-IN%  
**Check Out Time:** %CHECK-OUT%

Property Terms and Conditions: [Please click HERE for det](#)

Booking notes: %CUSTOMNOTES3%

CRS Reservation Confirmation  
 ARR\_INFO\_LEISURE  
 BOOKING\_CONFIRM\_AGENT  
 BOOKING\_CONFIRM\_LEISURE  
 BOOKING\_CONFIRMATION  
 DEPART\_LEISURE  
 TEST  
 CRS Reservation Cancellation

**Template Details**

**B I U** [List Icon] [List Icon] [List Icon] [Color Icon] [Font] [Size]

Dear %BOOKERFORENAME%

Thank you for choosing to book with us at %SITEDESC

Please could you take a moment to read through your b

**PROPERTY DETAILS:**

%SITEDESC%, %SITEADDRESSBLOCK%

Property location: [Click here for property location](#)

**BOOKING CONFIRMATION:**

%CRS\_SegmentTemplate\_52%

Please make sure you are aware of the property **Terms**

## Automated Templates



1. Click on the **System** icon (cogs).
2. From **Tools**, click **Template Automation**.
3. Click **New Schedule** button.



## How to Create a New Automated Template Schedule

The New Schedule Template page is broken down into the following sections:

- Schedule
- Recipients
- Templates
- Rate Plans
- Inclusion

## Schedule

The screenshot shows a form titled "Schedule" with the following fields:

- Description: A text input field with a red asterisk indicating it is required.
- Issue: A text input field containing the value "0".
- Days: A text input field containing the value "Before".
- Before: A dropdown menu.
- Creation: A dropdown menu.
- Delivery Method: A dropdown menu containing the value "E-mail".
- Room Pick Handling: A dropdown menu containing the value "Per Room Pick".

The **Schedule** section contains the following fields:

- Description is the name of the template schedule
- Issue/Days determines when the template schedule should be sent; how many days before/after: Reservation Creation, Arrival Date, Departure Date, Deposit Due Date
- Delivery Method options are either email or SMS
- Room Pick Handling determines if the templates should be sent to each room pick within a group or multi-room or if just one template should be sent for the whole reservation

## Recipients

The screenshot shows a form titled "Recipients" with the following fields:

- From: A text input field.
- Reply To: A text input field.
- Recipient: A dropdown menu containing the value "Contact".
- No Contact: A dropdown menu containing the value "Do Not Send".
- Duplicate Profiles: A dropdown menu containing the value "Use Contact".

The **Recipients** section contains the following fields:

- From/Reply to, masks where the email is sent from and guests can reply to
- Recipients option to send the template to the contact, lead guest or both
- No Contact if a reservation does not contain a contact, and contact is included in the previous selection, either 'do not send' or send to lead guest

- Duplicate Profiles if the template schedule is configured to send to both the contact and the lead guest, and both profiles are the same, option to send to either the lead guest or the contact

## Templates

Templates	
Contact Template	Confirmation ▼
Lead Guest Template	Confirmation ▼

The **Templates** section contains the following fields:

- Contact Template select the template to be sent to the contact
- Lead Guest Template select the template to be sent to the lead guest

## Rate Plans

Rate Plans	
Include All Rate Plans	<input type="checkbox"/>
Include Only These Rate Plans	[Multi-select dropdown]
Rate Plan Selection	Base Rate Plan ▼

The **Rate Plans** section contains the following fields:

- Include All Rate Plans tick box, when ticked will send to all rate plans
- Include Only These Rate Plans multi-select drop-down box of rate plans; enabling specific rate plans to be selected
- Rate Plan Selection determines if the rate plans selected (above) should be calculated based on either the 'Base' rate plan or the most used rate plan

## Inclusions

**Inclusions**

Booking Statuses  ▼

System Sources  ▼

Media Source   ▼

Market Segment   ▼

MultiRooms

Groups

Room Blocks

Exclude From Mailing

[Save](#)

The **Inclusions** section contains the following fields:

- Booking Statuses multi-select drop-down list of bookings statuses; enabling specific statuses to be selected
- Media Source/ Market Segment, by ticking the box will include all or you can choose certain options from the drop down menus.
- System Sources multi-select drop-down list of booking sources
- Multi Rooms tick box, when ticked will include multi-room reservations
- Groups tick box, when ticked will include all group reservations
- Room Blocks tick box, when ticked will include all group reservations

Click the **Save** button to save the changes made.

### Creating Transaction Plans



1. Click on the **CRS Module** icon (organisational chart).
2. From **Configuration**, click **Transaction Plans**.



3. Click on **New Transaction Plan**.



4. Create a **Code/Description**.
5. Select the **Number of Accounts**.
6. Select the **Transaction Rules**.

**Transaction Plan**

Code

Description

Number of Accounts  ▼

Transaction Rules  ▼

Save

7. Click **Save**.

## Transaction Rules

### Simple

Allows you to simple select **Accept** or **Refuse** per each different account across the 3 charge modes.

**Transaction Plan**

Code

Description

Number of Accounts  ▼

Transaction Rules  ▼

	Account 1	Account 2	Account 3
Rate Plan	Accept ▼	Refuse ▼	Refuse ▼
Product Upsells	Accept ▼	Refuse ▼	Refuse ▼
Product Rule Upsells	Accept ▼	Refuse ▼	Refuse ▼

### Advanced

Allows you to select from all the analysis codes. Once you have selected your choice tick the boxes relevant and click **Edit**.

Transaction Rules **Advanced** ▼

**Edit**

	Analysis Code	Description
<input checked="" type="checkbox"/>	BAR	Bar Income
<input type="checkbox"/>	VISIT_PARK	Car Parking Visitor Income
<input type="checkbox"/>	OWNER_COMM	Commission Posting to Owner
<input checked="" type="checkbox"/>	CANX_CONF	Conference Cancellation Fee
<input checked="" type="checkbox"/>	EDU_GRP_MEAL	Educational Group Meal
<input type="checkbox"/>	EDU_GRP_RENT	Educational Groups Rent
<input checked="" type="checkbox"/>	EXT_ACCOM	External Accommodation

This allows you to choose what each account will allow and select a certain amount or percentage to allow charging by also.

Transaction Plan Rules						
Analysis Code	Description	Account 1	Value	Account 2	Value	Account 3
BAR	Bar Income	Accept		Refuse		Refuse
CANX_CONF	Conference Cancellation Fee	Accept		Refuse		Refuse
EDU_GRP_MEAL	Educational Group Meal	Accept		Refuse		Refuse
EXT_ACCOM	External Accommodation	Accept		Refuse		Refuse

**Abort** **Apply**

Analysis Code	Description	Account 1	Value
BAR	Bar Income	Accept	
CANX_CONF	Conference Cancellation Fee	Refuse	
EDU_GRP_MEAL	Educational Group Meal	Accept to a Daily Value	
EXT_ACCOM	External Accommodation	Accept to a Daily Percentage	

Once you are happy click on **Apply** and **Save** to save the Transaction Plan. Repeat until all of your Transaction plans have been created.

### Creating Payment Plans



1. Click on the **CRS Module** icon (organisational chart).
2. From **Configuration**, click **Payment Plans**.
3. Click on **New Payment Plan**.

**New Payment Plan**

4. Enter a **Plan Code** and give the code a **Description**.

Payment Plan Code	
Plan Code	<input type="text"/>
Description	<input type="text"/>

5. Complete **First Invoice** and the **Frequency** field.

### First Invoice

- *Frequency* – Days/Months and the Value
- *Starting* – Arrival/Current or Departure for the invoice to be created
- *Handling Mode* – In advance or arrears of the booking
- User Defined – for the user to decide each time

First Invoice		
Frequency	<input type="text" value="Days"/>	Value <input type="text"/>
Starting	<input type="text" value="Arrival Date"/>	
Handling Mode	<input type="text" value="In Advance"/>	
User Defined	<input type="checkbox"/>	

Frequency	
<input type="radio"/>	Whole Stay
<input type="radio"/>	Every <input type="text" value="Days"/>
<input type="radio"/>	Every Month (Day of Month based on first Invoice Date)

**Save**

### Frequency

- *Whole Stay* – from the arrival to the departure date, 1 invoice with 1 line within the invoice to be created
- *Every* – Day/Month – this will create an invoice with a line being created depending on the choice
- *Every Month* – will create an invoice each month

6. Click **Save**.

### User Set-up



1. Click on the **System** icon (cogs).
2. From **System**, click **User Set Up**.
3. It will ask you to confirm your password one more time.

### Confirm Credentials

Please re-enter your logon details to access this functionality.

Password  \*

OK

4. Click to create a **New Global Group** if required  
Created as a shortcut to decide different levels of access and these can be edited at any point.
5. Click to create a **New Global User**.

New Global User

New Global Group

6. **Operator Code** – Recommend surname followed by first initial
7. **Description** – Full Name
8. **Password** – Create a password
9. Choose the group or properties the new user will have access to.

User

 Operator Code   
Description   
Preferred Language **English** ▼  
Password  Re-Enter Password

Group Membership

Search  

Global Users and Groups London School of Economics Training

- ADMINS
- FICC
- FOH
- FOH\_MANAGERS
- OPERATIONS
- RESERVATIONS
- SALES
- SUPER\_USERS
- TRAINING Bankside House
- TRAINING Butlers Wharf
- TRAINING The George IV Apartments
- TRAINING Grosvenor House
- TRAINING High Holborn
- TRAINING Northumberland House
- TRAINING Passfield Hall
- TRAINING Rosebery Hall
- TRAINING Carr Saunders Hall
- TRAINING Sidney Webb House