Information Management and Technology

LSE Rezlynx Training Work Book

Prepared by

Zoë Harney / Karen Fisher

For

London School of Economics

Houghton St, London WC2A 2AE

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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.

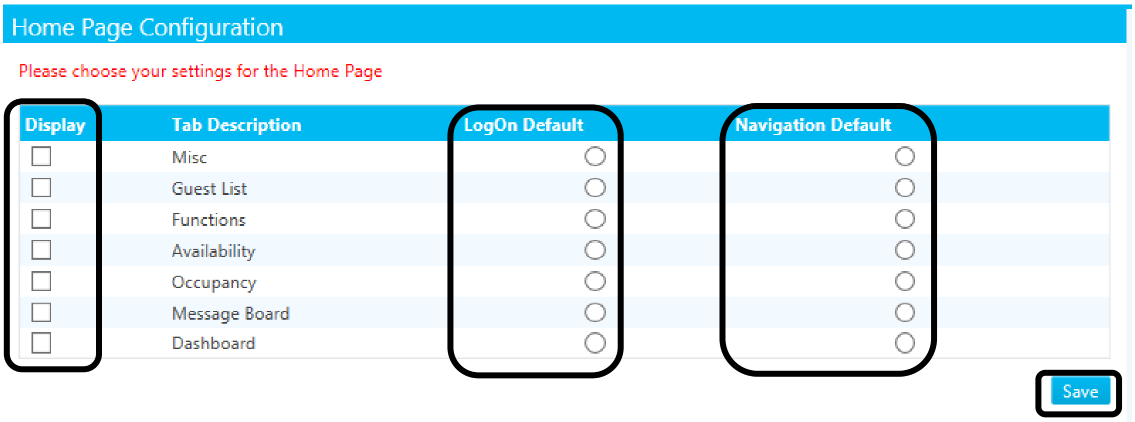
Logging On

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.



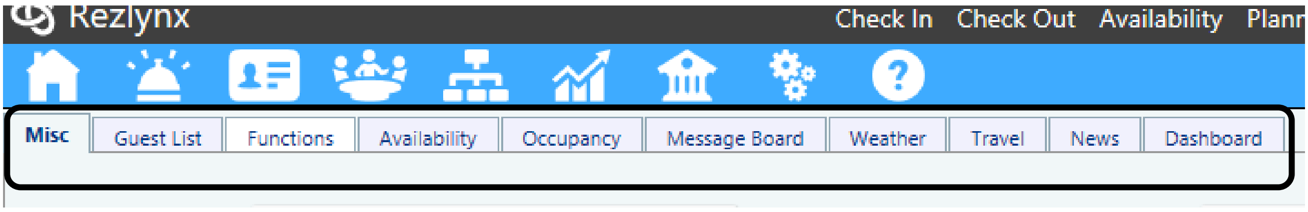
1. Tick the corresponding boxes in the Display column for each item you want to select
2. Tick in the corresponding **logon** and **navigation default** columns
3. Click **Save**

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

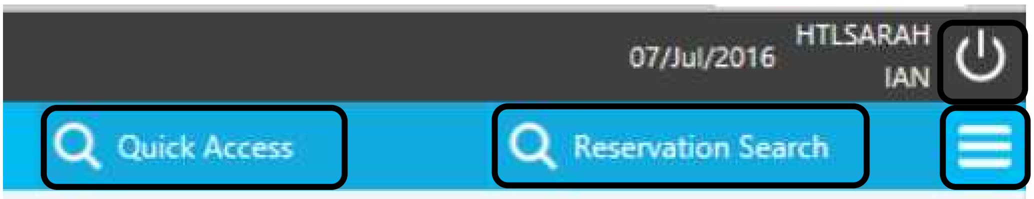
Main Menus

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"



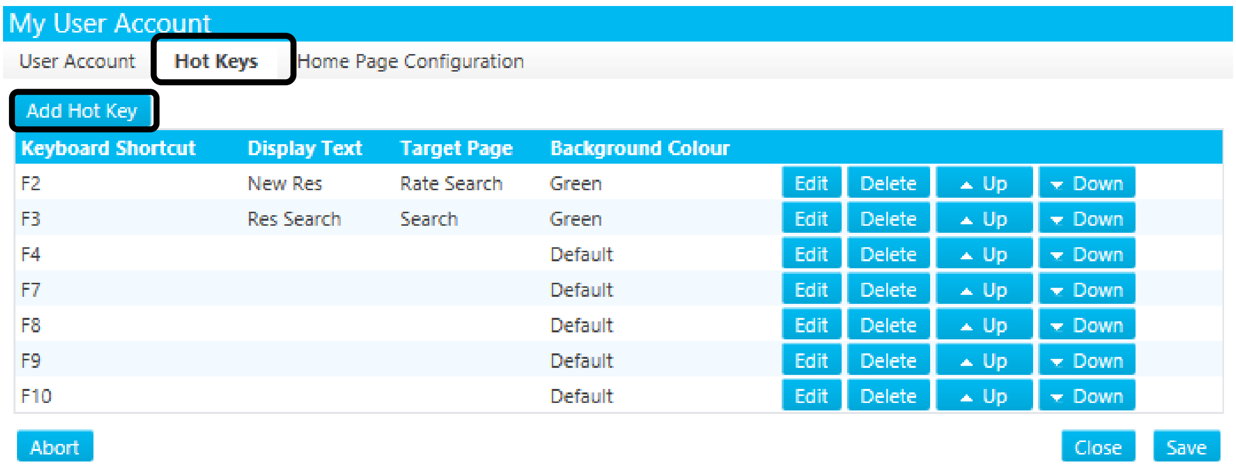
- **Quick Access** – typing part or all of the menu header will return the appropriate menu in the drop down menus.
- **Reservations Search** – typing the booking reference number in the reservation search will return reservations search result
- **Log Off (Power Symbol)** – Click to log yourself out 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.



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

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

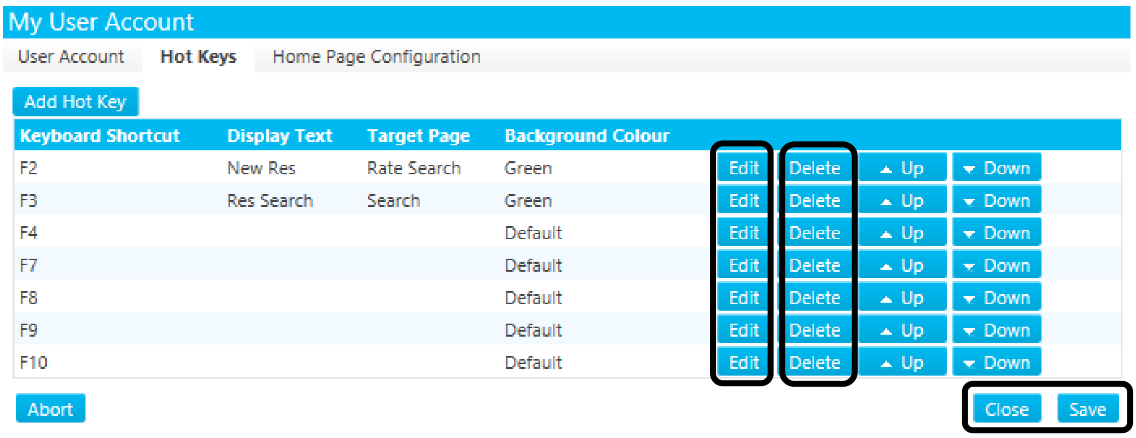
- **Page** - Select the page that the new hot key should open when clicked.
- **Display Text** - Enter the name that will be displayed on the hot key button.
- **Keyboard Shortcut** - Add a keyboard shortcut.
- **Background Colour** - The default colour for a hot key is blue and matches the Rezlynx colour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

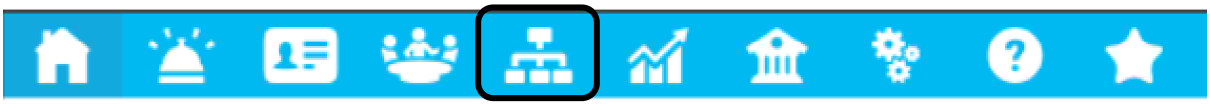


The **Up** and **Down** keys can be used to reorder the display of the hot keys.

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

CRS Reservation

Making a Reservation

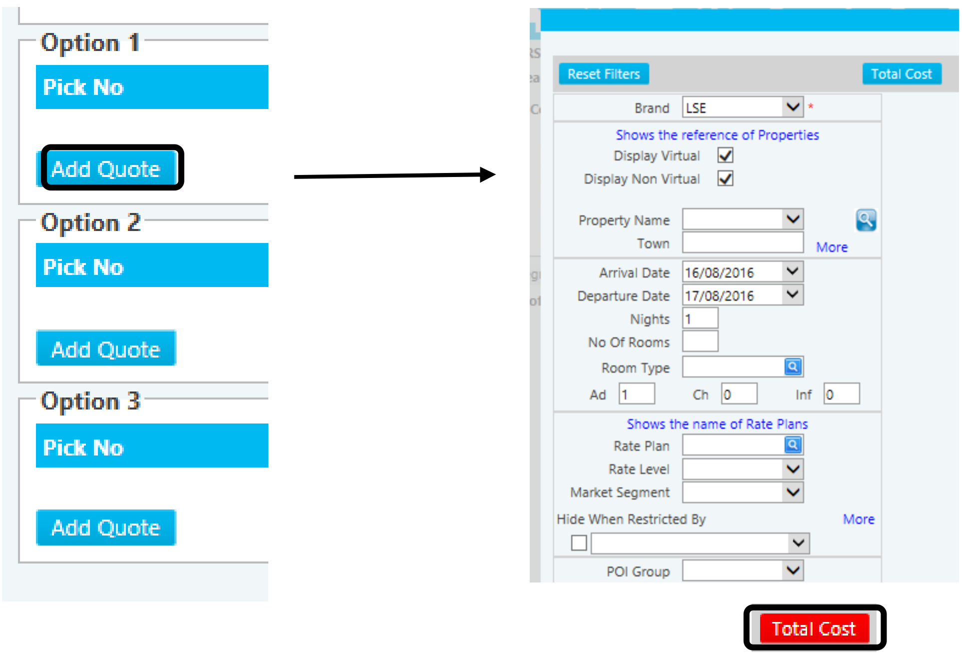


1. Click on the **CRS Module** icon (organisational chart).
2. From **reservations** click on **Enquiries**.
3. This will take you through to the enquiry section.
4. Click **create** to start.

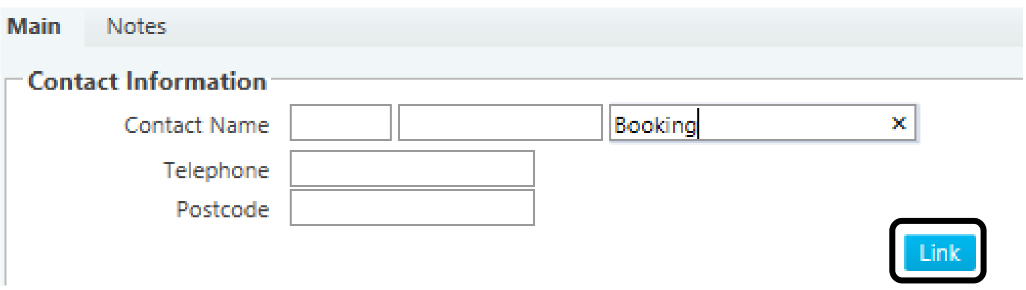
Quote an option to a potential customer

1. From Option 1, click the **add quote** button.

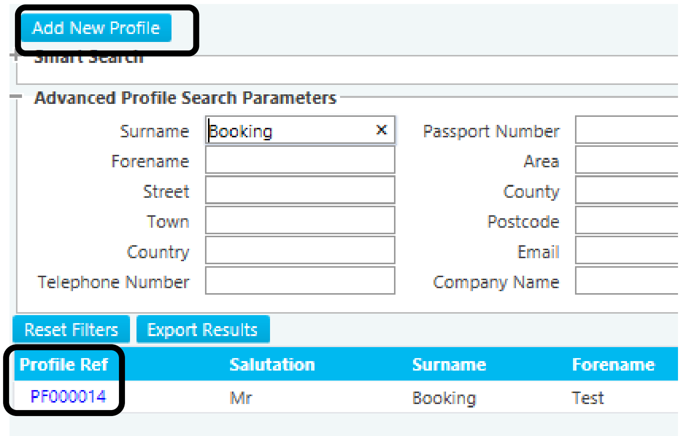
   This will take you to the rate search screen and you can search by the customer's requirements.
2. When you have chosen the right requirements click on the **total cost** button to add the option to the customer's quote. (You can add many quotes to the enquiry).



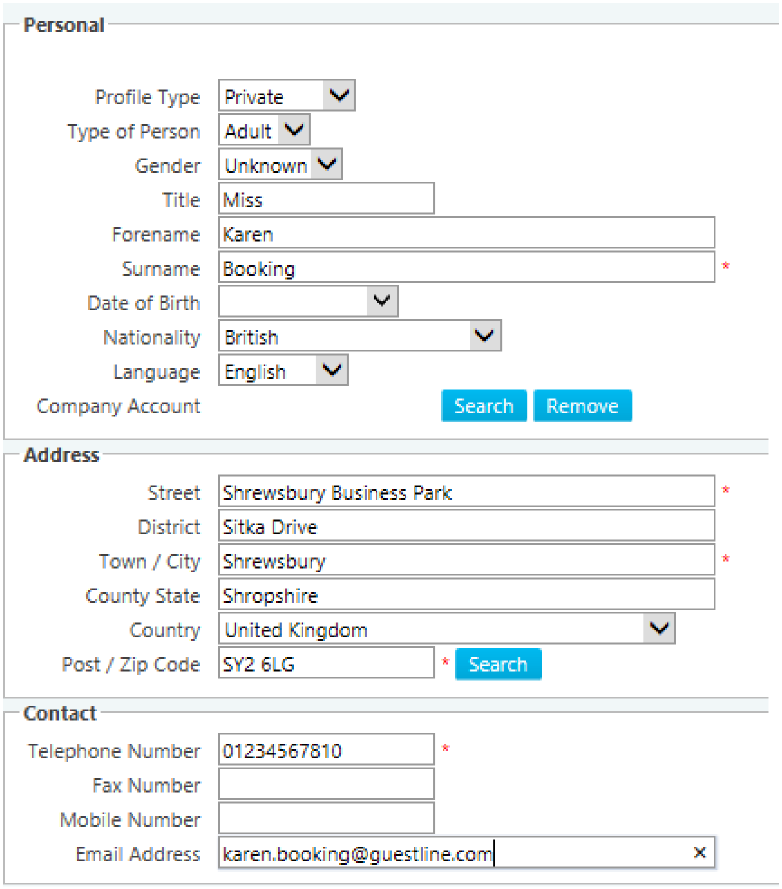
3. Enter the customers surname into the surname box and click the **Link**.



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



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



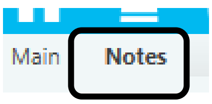
Information with a * is a mandatory field and must be completed before saving.

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

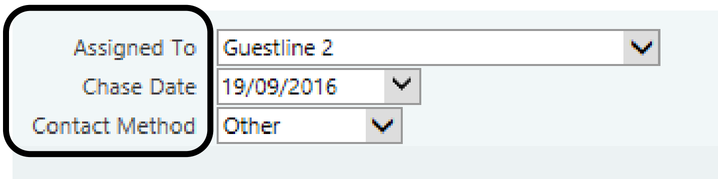
Email is optional but always ask as confirmations are sent via email and for marketing purposes.

Click **Save**

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



5. Click **Save**.

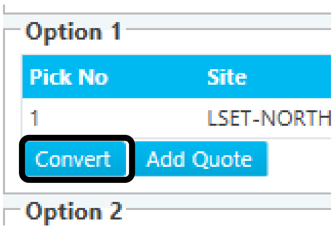


- **Assigned To** – automated to the person creating the Enquiry
- **Chase Date** - 3 days after creation
- **Contact Method** – How the guest would like to be contacted

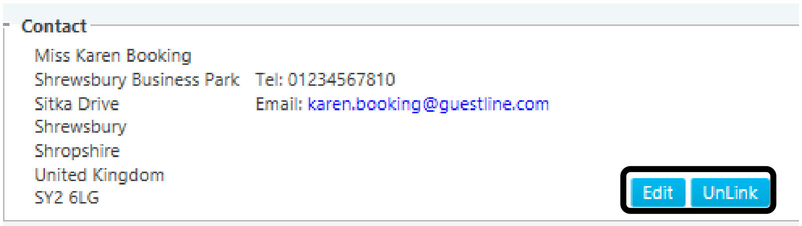
Converting an Enquiry Straight Away

1. From the **Option** click the **convert** button

   This will take you through to the CRS reservation screen

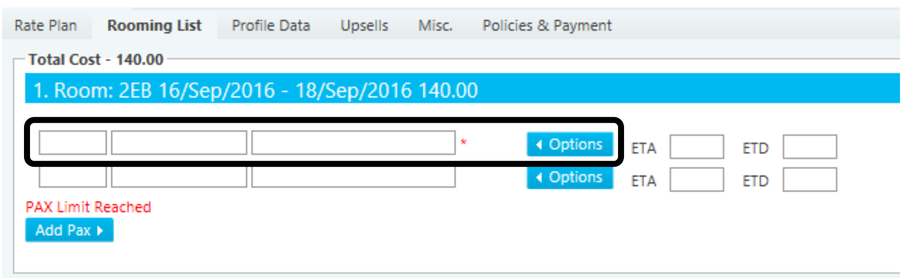


2. Click **Edit** to edit the contact details if required or **Unlink** to amend to another profile.

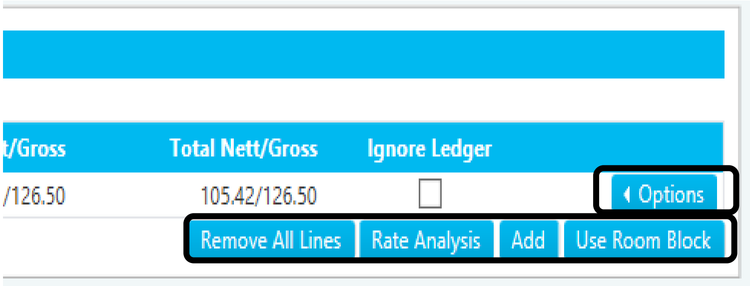


3. Click **Search** to enter a company or agent profile to the booking.

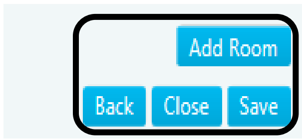
4. From the **Rooming List** tab details can be edited if the person staying differs from the contact. Enter the surname, click **options**, **link**, select profile, if no profile, add a new profile.



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

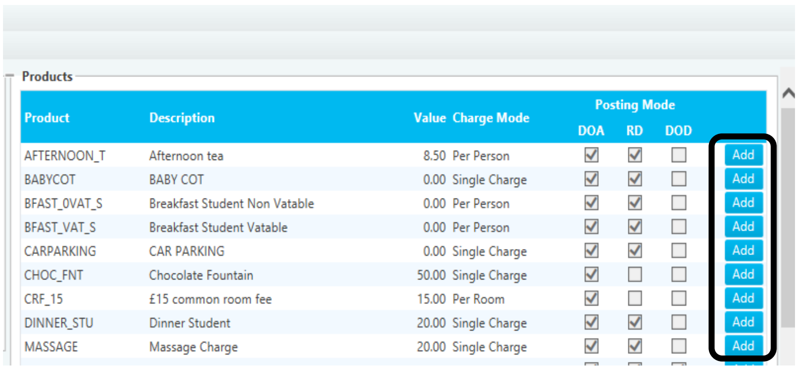


- **Options** to 'change' the room, rate or dates selected, Override which lets you overtype the rate per night
- **Remove** All Line to completely and add a new room, date & rate
- **Rate Analysis** to see the rate per night
- **Add** to add a change, room rate or room type
- **Use Room Block** to link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

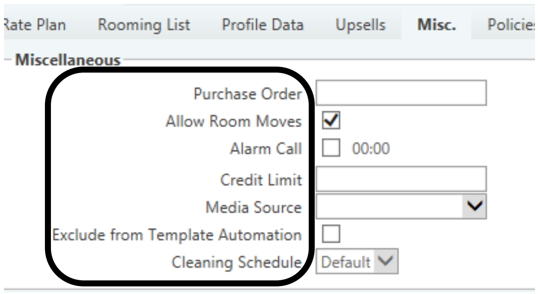
6. From the **Upsells** tab you can add extra's to the room. If you have more than one room on the segment you can select which room you wish to add the extra's onto.


Products

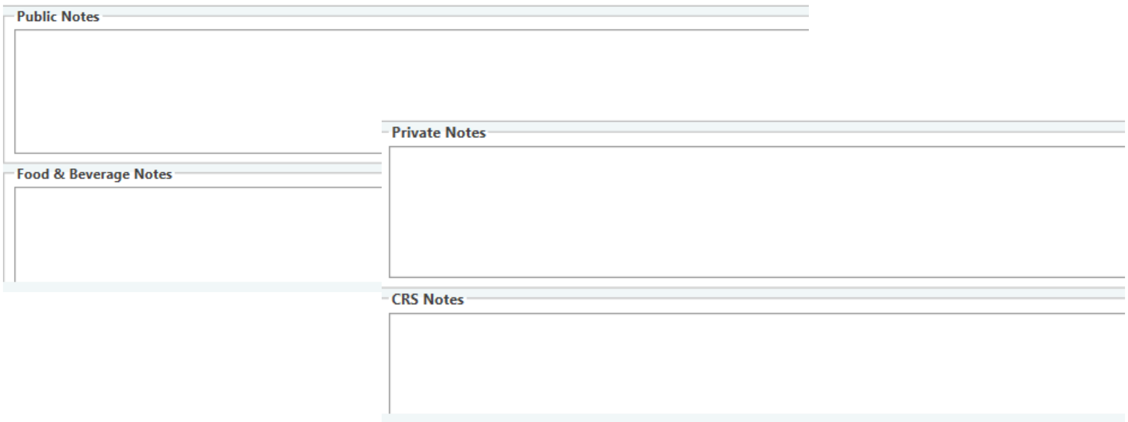
Product	Description	Value	Charge Mode	Posting Mode DOA	RD	DOD	
AFTERNOON_T	Afternoon tea	8.50	Per Person	☑	☑	☐	Add
BABYCOT	BABY COT	0.00	Single Charge	☑	☑	☐	Add
BFAST_0VAT_S	Breakfast Student Non Vatable	0.00	Per Person	☑	☑	☐	Add
BFAST_VAT_S	Breakfast Student Vatable	0.00	Per Person	☑	☑	☐	Add
CARPARKING	CAR PARKING	0.00	Single Charge	☑	☑	☐	Add
CHOC_FNT	Chocolate Fountain	50.00	Single Charge	☑	☐	☐	Add
CRF_15	£15 common room fee	15.00	Per Room	☑	☐	☐	Add
DINNER_STU	Dinner Student	20.00	Single Charge	☑	☑	☐	Add
MASSAGE	Massage Charge	20.00	Single Charge	☑	☑	☐	Add

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

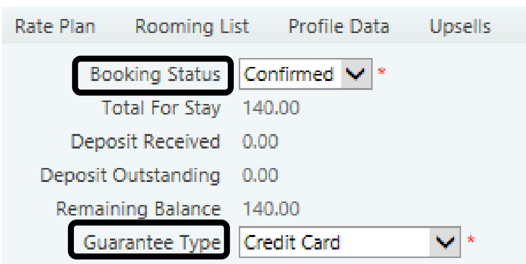
Purchase Order	Allow Room Moves	Alarm Call
Credit Limit	Media Source	Exclude from Template Automation



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



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



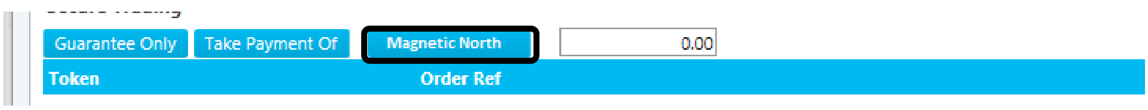
Booking Status – Provisional or Confirmed

Guarantee Type – credit card, ledger or both

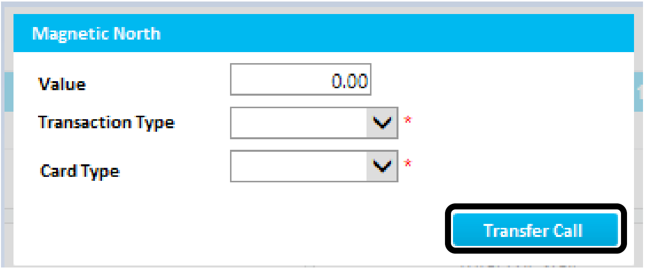
Taking Payment via Secure Trading

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

Payment **<u>MUST</u>** be taken before saving the reservation.



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



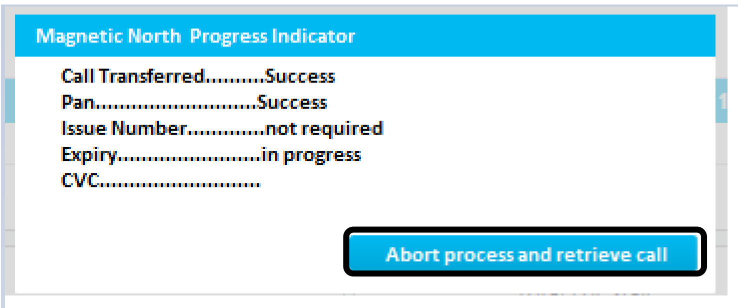
- **Value** – Payment Due
- **Transaction Type** – Guarantee or Take Payment
- **Card Type** – the make of the card being used for payment

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.

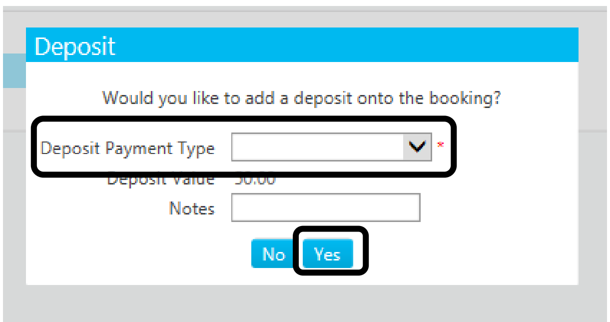
3. Click **Transfer Call**

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.

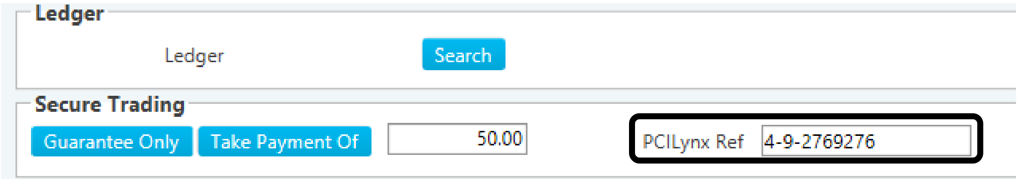


5. From ending the Magnetic North process, a **Deposit** pop up will appear



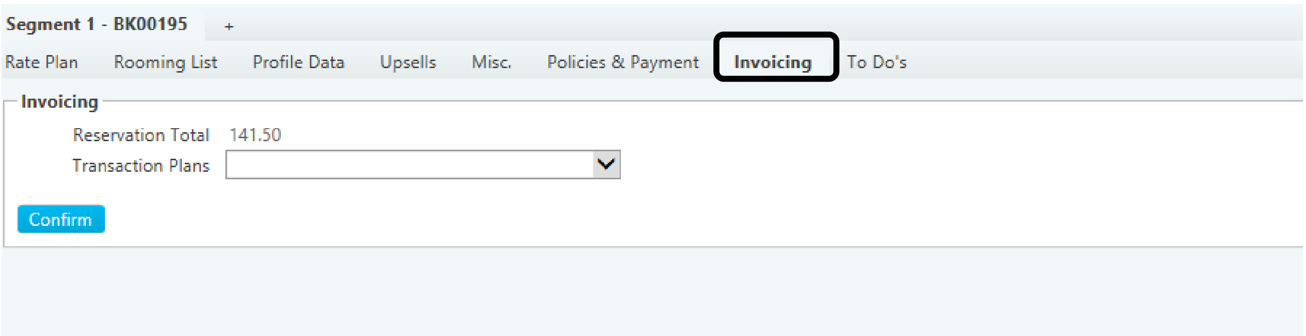
6. **Deposit Payment Type** - PCI_Property as the money has been processed at property level
7. Click **Yes**

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.



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

Invoicing Set Up



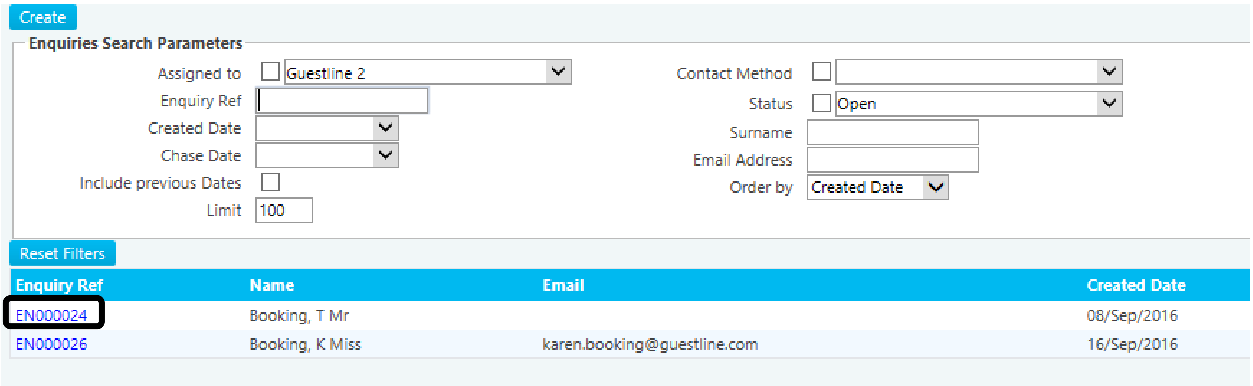
This segment is where you will set the plans, accounts and create accounts. You will also see a Reservations Total.

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

Converting an Enquiry Not Straight Away

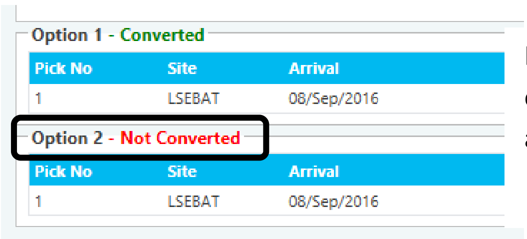
If the customer calls back later to proceed with the enquiry, please follow the below steps.

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**.

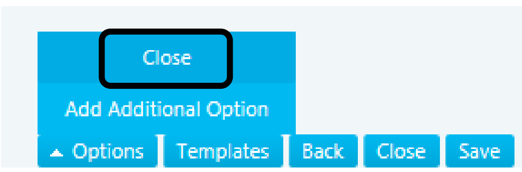


6. If there is no availability left for that option type, exit the current screen to go back to the Enquiry page. Under that option on the right hand side, click the **options** button and change. Enter the same criteria and click **Total Cost**. Explain to the guests and give other options available.

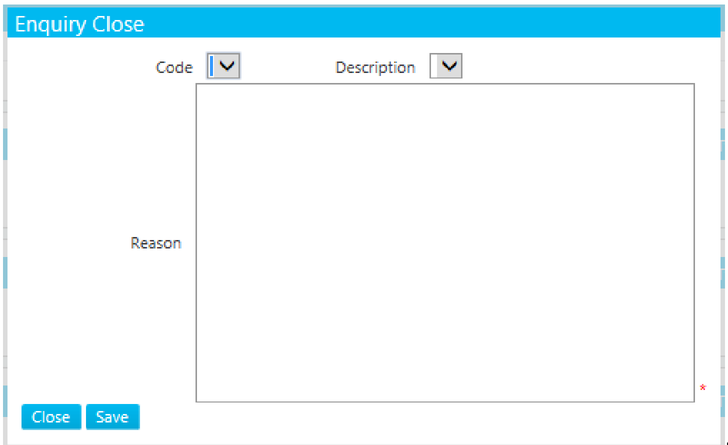
7. Follow the process from clicking the **convert** button as listed previously.



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



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



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

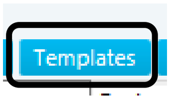
1. Click the **Template** button.

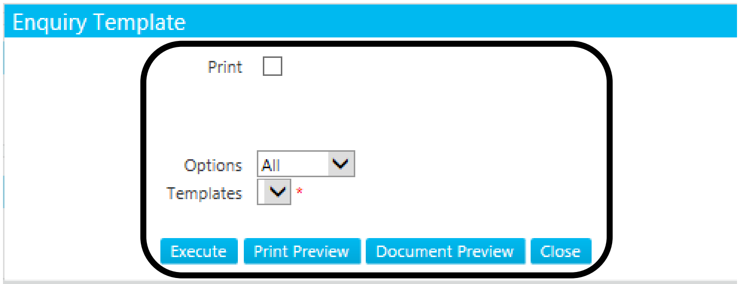
The **Enquiry Template** box will appear. Complete the following:

- 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.

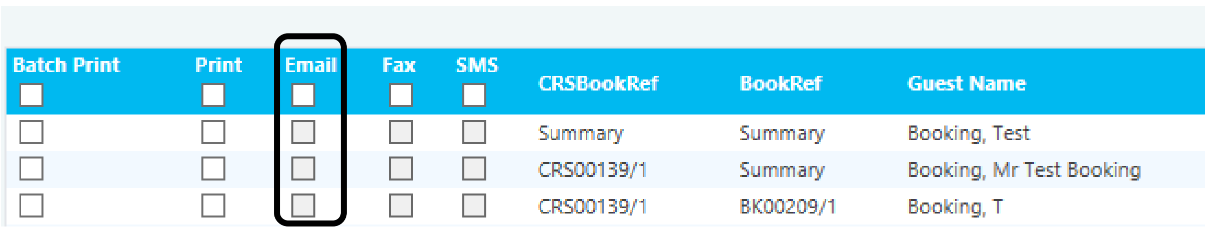




Converted

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.

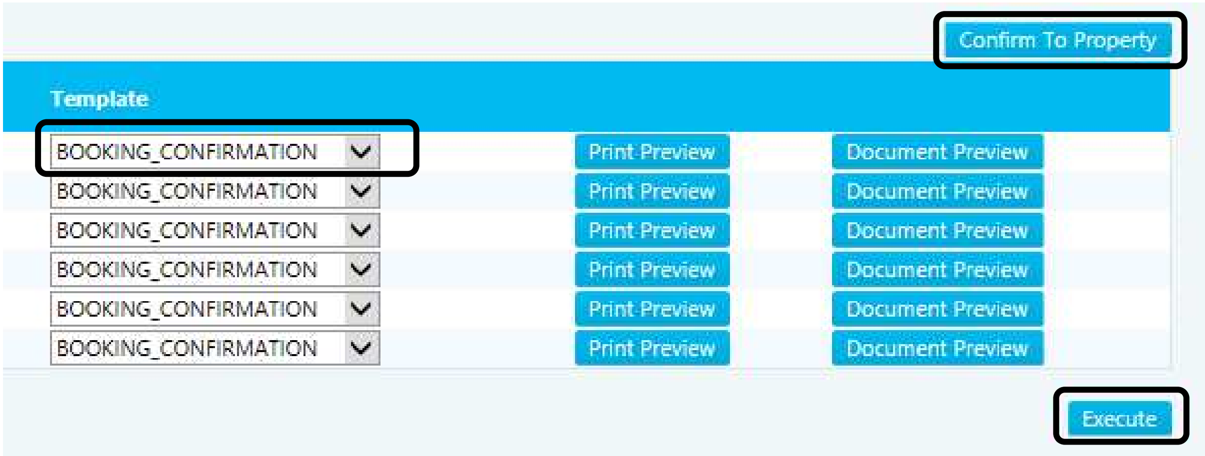


CRSBookRef Summary – Summary of all rooms booked on the different segments.

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

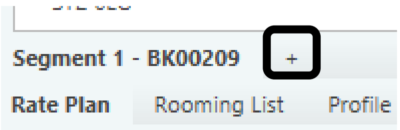


Segments

Adding a New Segment

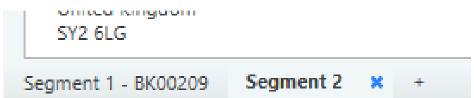
To add a new segment onto an existing booking:

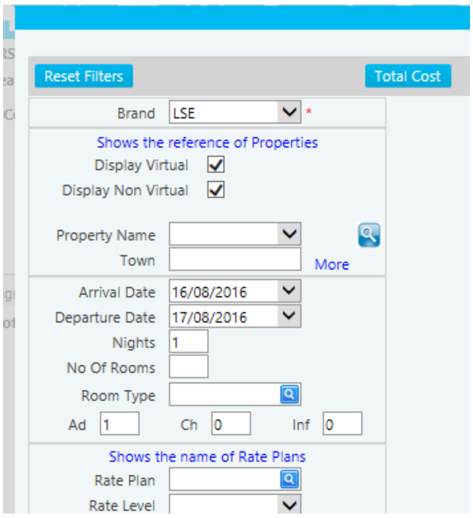
1. Click on the **CRS Module** icon (organisational chart)
2. From **reservations** click on **Search**.
3. This will take you through to the reservation search
4. Search by the parameters
5. Click on the **CRSBookRef**



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

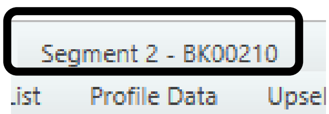




Once the **+** has been selected and Segment 2 appears it will redirect automatically to the rate search page.

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.

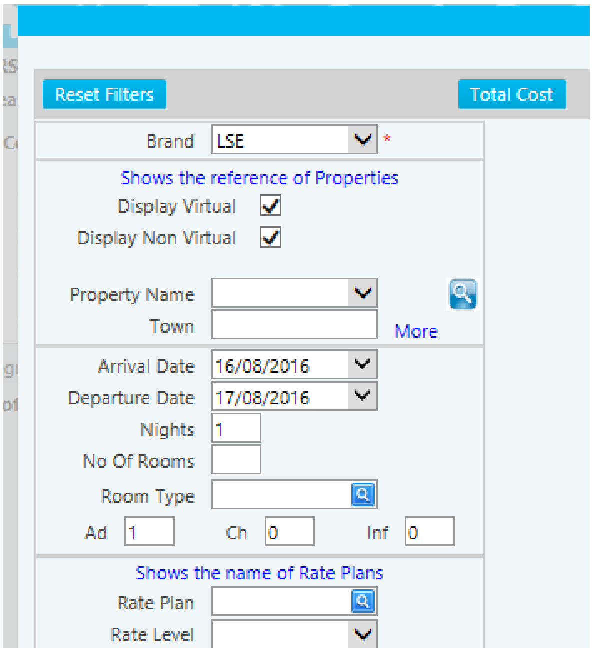
Just like the segment before remember to complete the following:

- 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.



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.

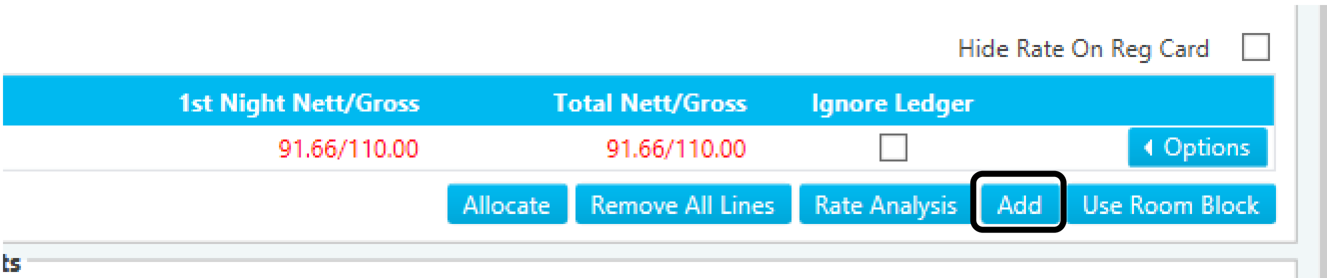
Change the name if it differs as it will pull through the contact name onto the rooming list.

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.

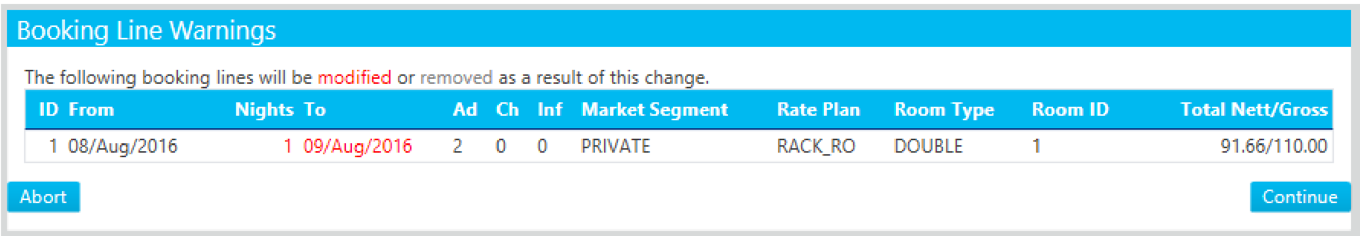
Mid Stay Changes (Booking Lines)

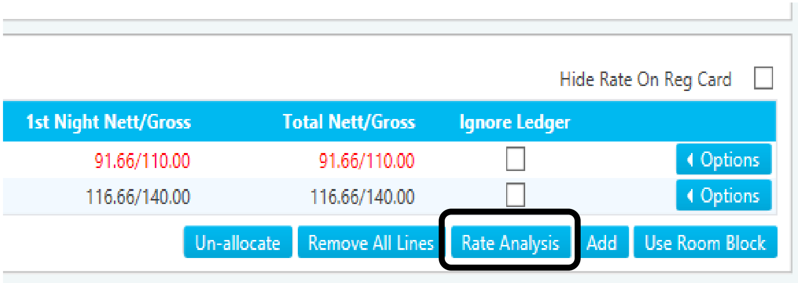


1. Click **Add** to add a booking line
2. Select the different rate plan or a different room type and room id.

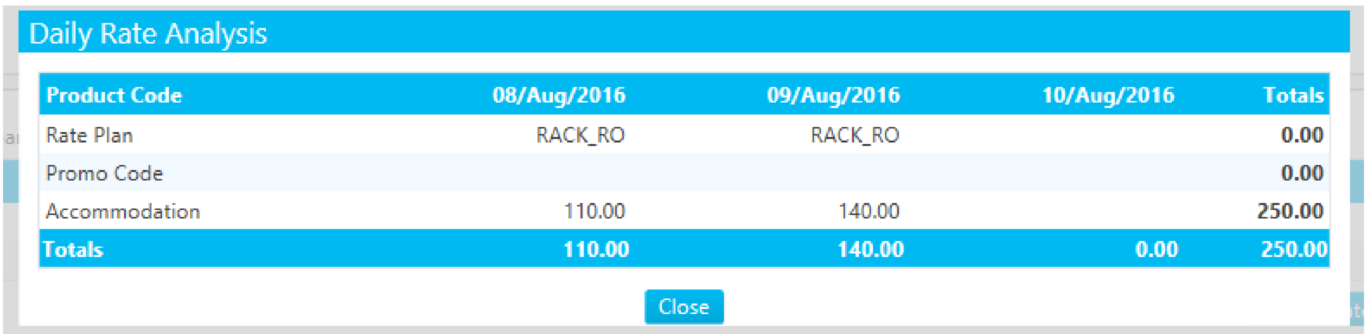
You can have as many booking lines as you wish.

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





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

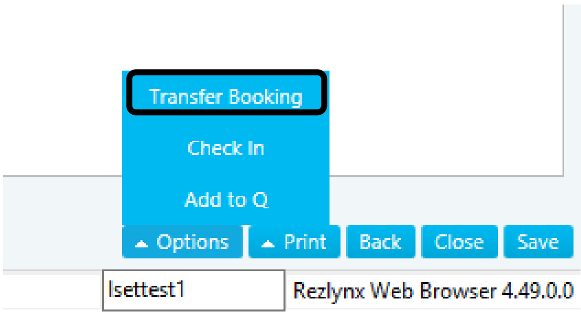
To transfer the reservation must not have the following status':

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

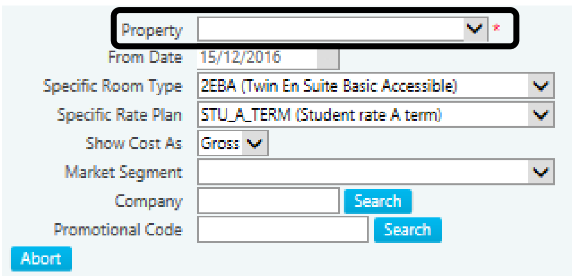
Roomlynx OTA/GDS created reservations will have restraints on the ability to be transferred based on a channel by channel basis. Rezlynx will deal with this by either permitting or restricting property transfer

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

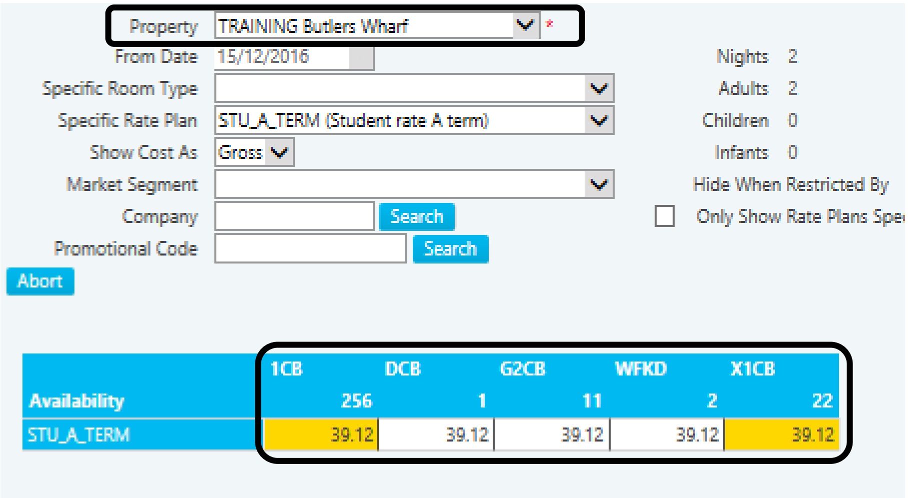
4. Within the reservation from the **Options** button, click the **Transfer Booking**.



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



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



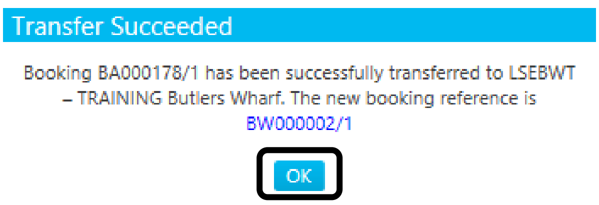
7. Select the new **Room Type** to transfer the booking to that property.

8. From clicking on the new room type, it will direct you to the **transfer screen**.

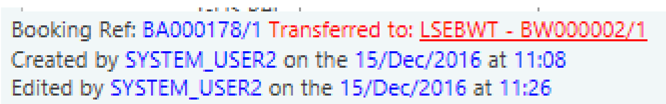
9. The booking information from the property you are transferring from will default into the property you are transferring to.

10. Click on the **Transfer** button at the bottom right of the box.

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



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



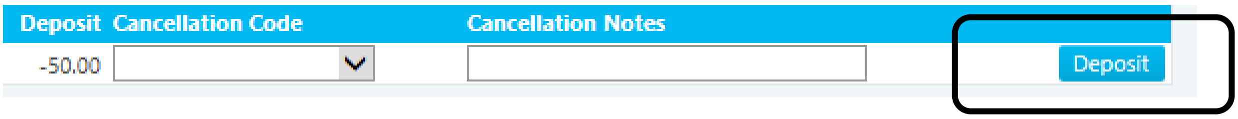
Cancelling a Reservation

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

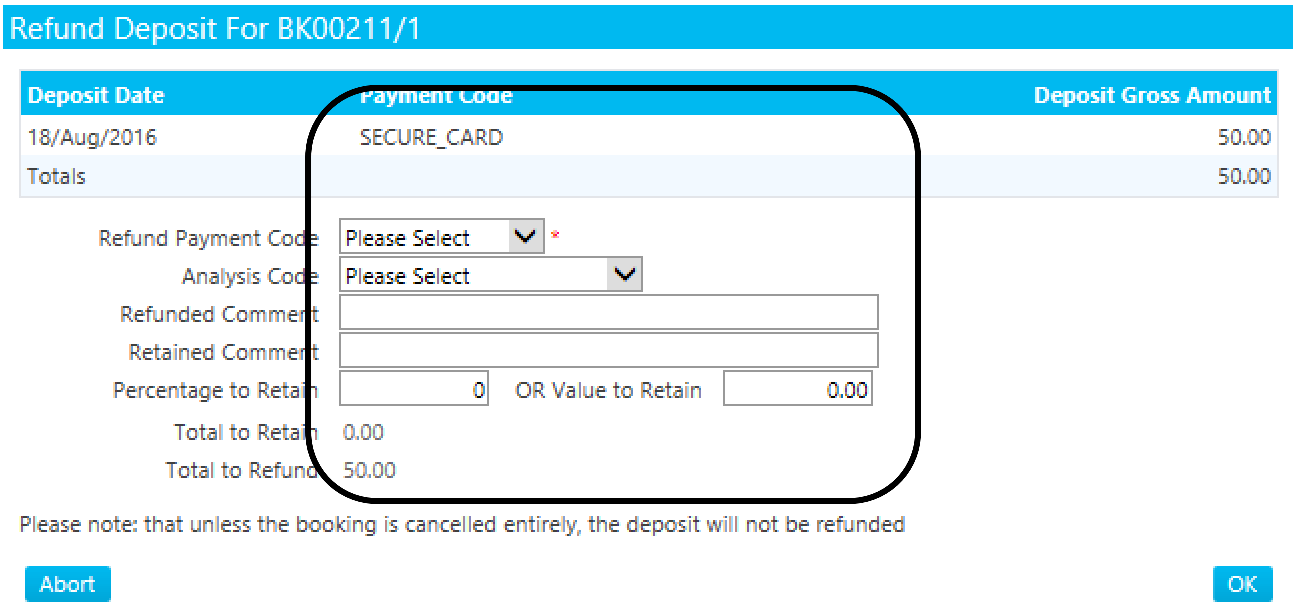
1. Cancel the booking from Rezlynx
2. If the invoice has been generated, the system will credit this automatically once it has been cancelled. Send the credit note to the booker.

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.



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**.



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: -

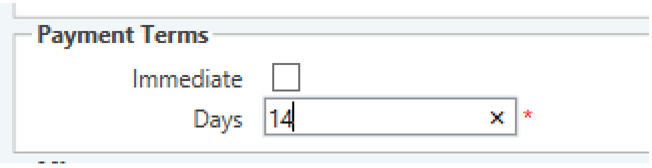
Transaction Plan – this determines how many *payment accounts* will be added to a booking and what charges those accounts will pay. PLEASE NOTE once this is set it cannot be changed.

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.

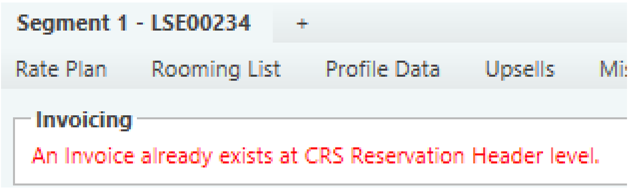


Header Vs Segment Invoicing

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.

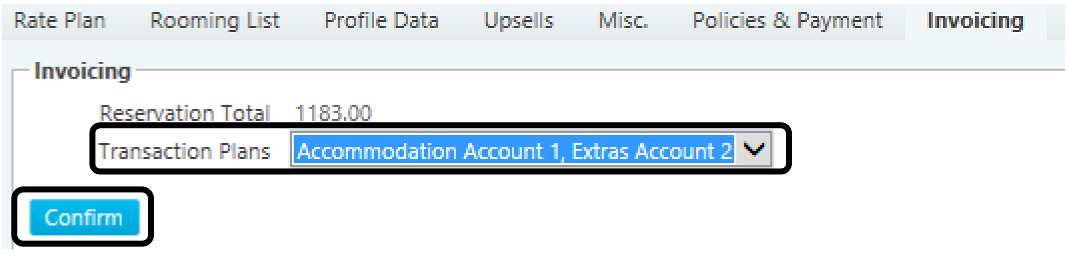
3 accounts. Account 1 = accommodation; account 2 = 50% upsells; account 3 = 50% upsells – This will split the charges between 3 payment accounts. The first payment account will accept the accommodation charges only, and any upsells will be split 50/50 between accounts 2 and 3. This is useful for a shared 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.

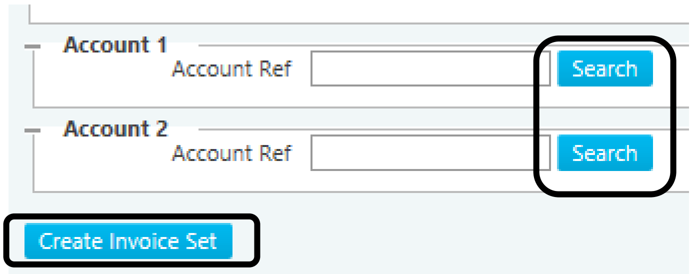
NB. It is crucial your client confirms how they wish to pay prior to the transaction plan being set.

Personal Payment Accounts

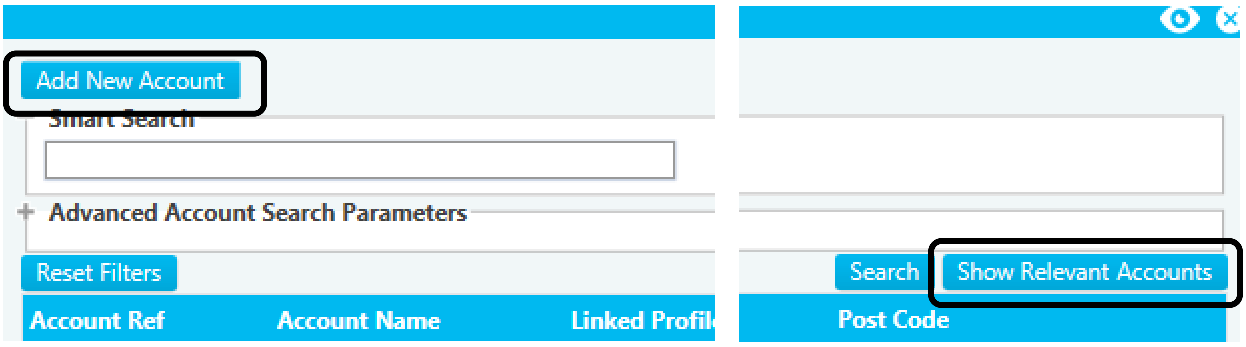
1. Select the **Transaction Plan** that applies to this booking. Click **Confirm.**



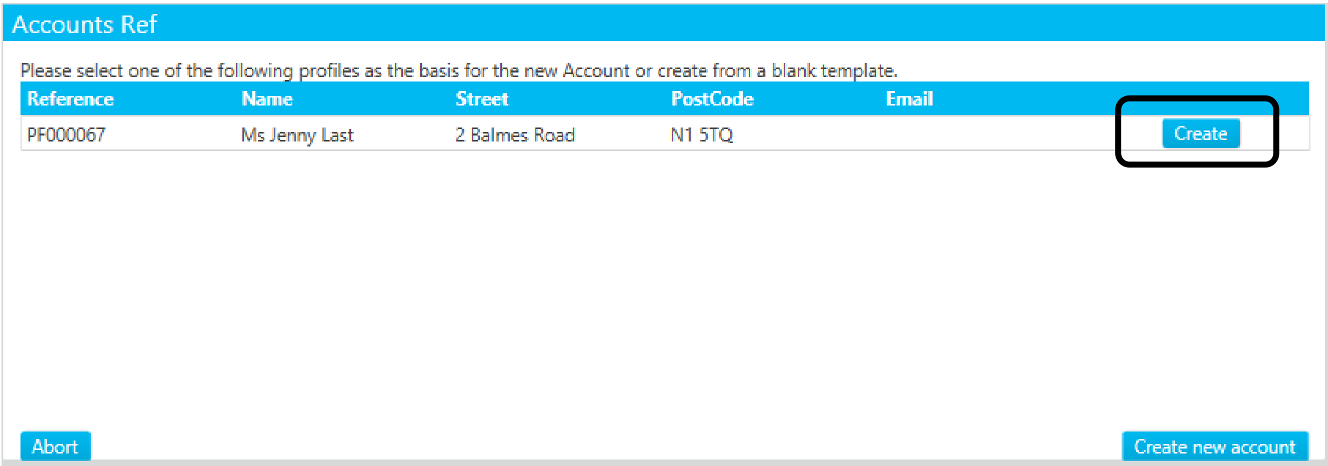
2. **Search** for the Account for each section of your Transaction Plan if selected. Two types of Payment Accounts can be attached: Personal Account and Company Account.



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.

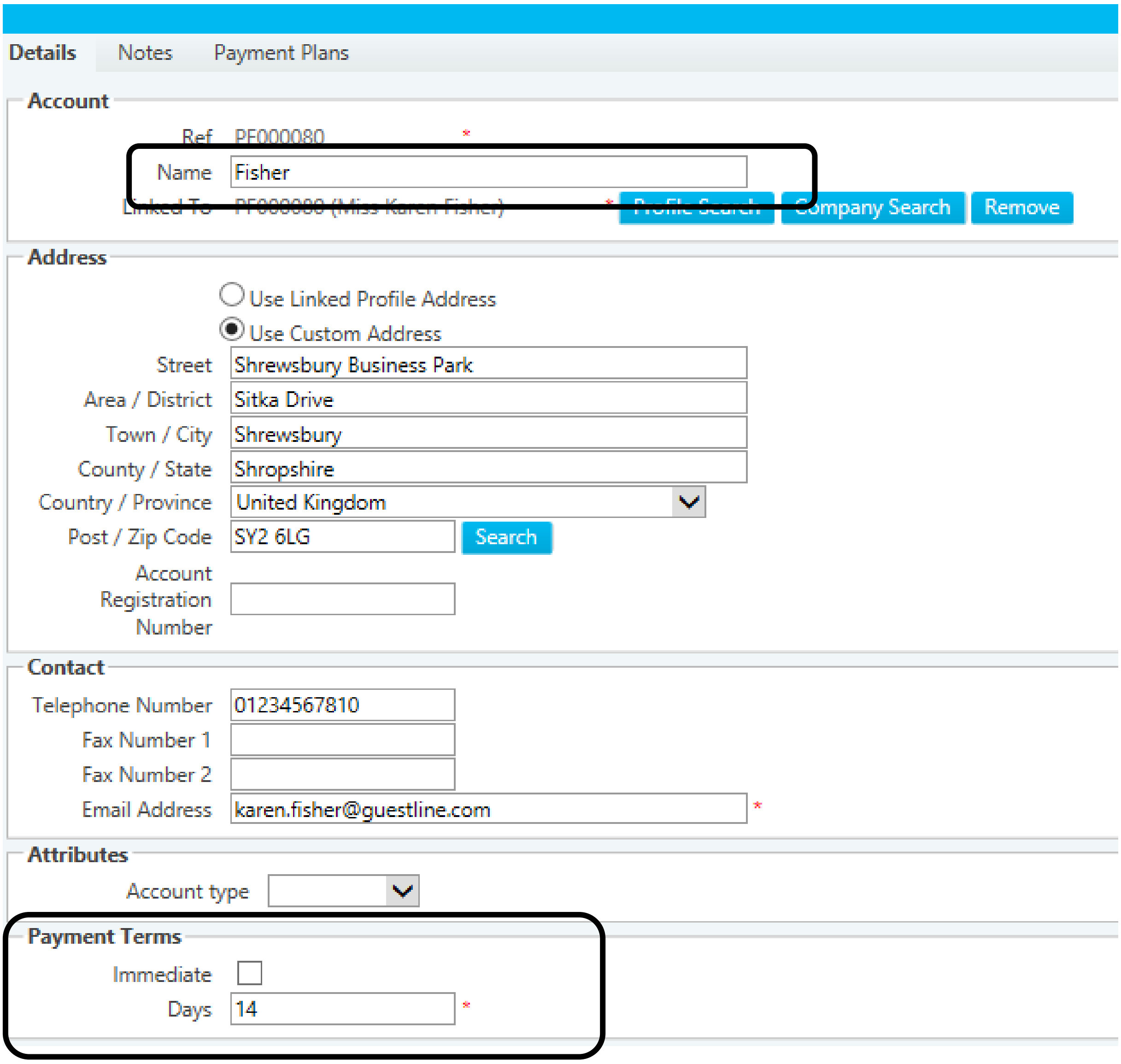


5. Any relevant profiles linked to the booking will now pop up - Select the **P** profile you are looking for and click **Create.**



6. This will bring up the account create screen. The **payment account** profile is linked to the selected **P** profile, and has the same reference.

7. 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.



8. 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.

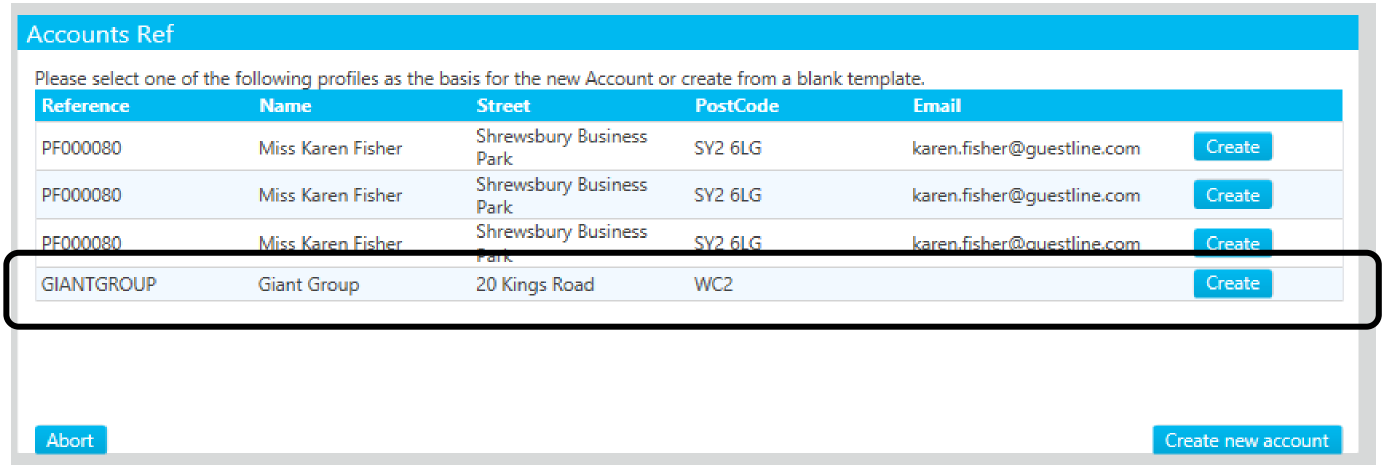
9. Select **Save Changes** on profile.

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

Company Payment Accounts

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



4. This will bring up the account create screen. The payment account profile is linked to the selected 'C' profile, and has the same reference.
5. 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.

6. 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 1st of the arrival month. When creating the invoice set the First Invoice Date to the 1st 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 1st of the month after arrival. When creating the invoice set the First Invoice Date to the 1st 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

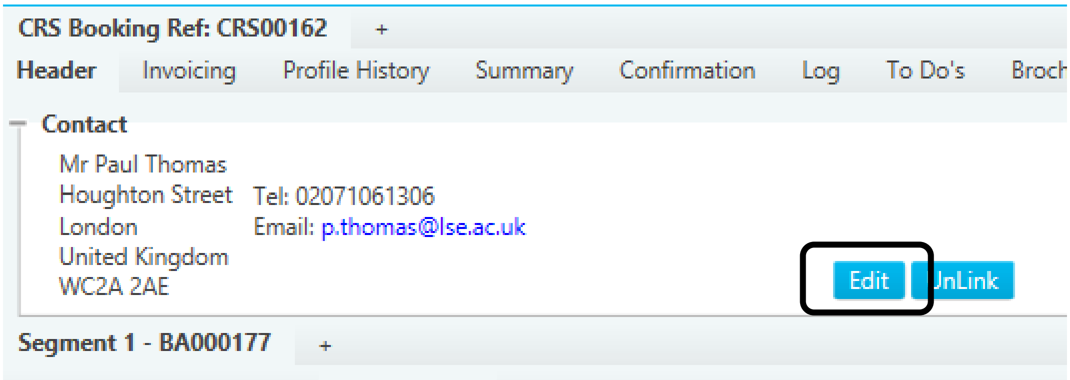
If a guest has a profile which is missing details, we must attempt to get this information at every possible opportunity. This will update in two locations:

- 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:

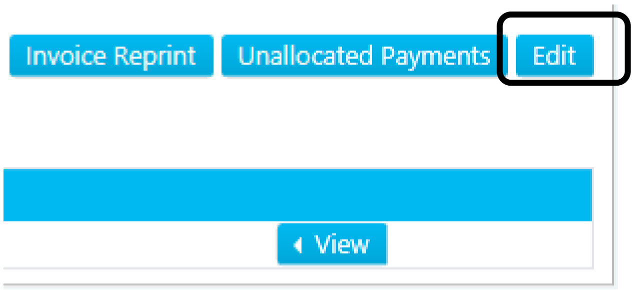
- Profile record for the guest is updated
- The payment ledger for the guest will be updated for future invoices

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

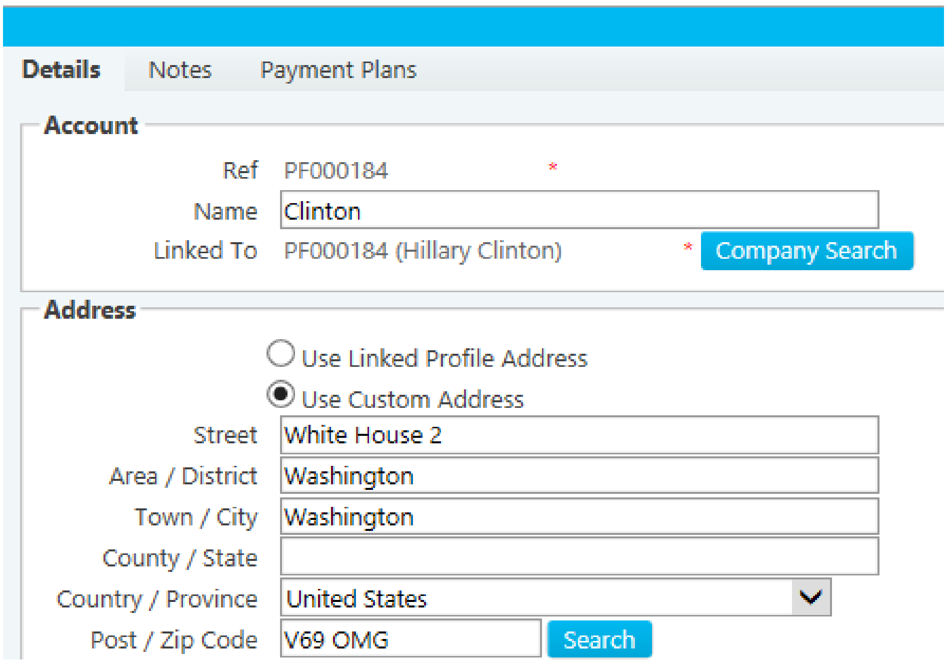


2. On the Profile screen, enter relevant information and click **Save Changes**.

3. To amend the Account, go to the **Invoicing** tab and click **Edit** on right hand side aligned with the Account Ref.

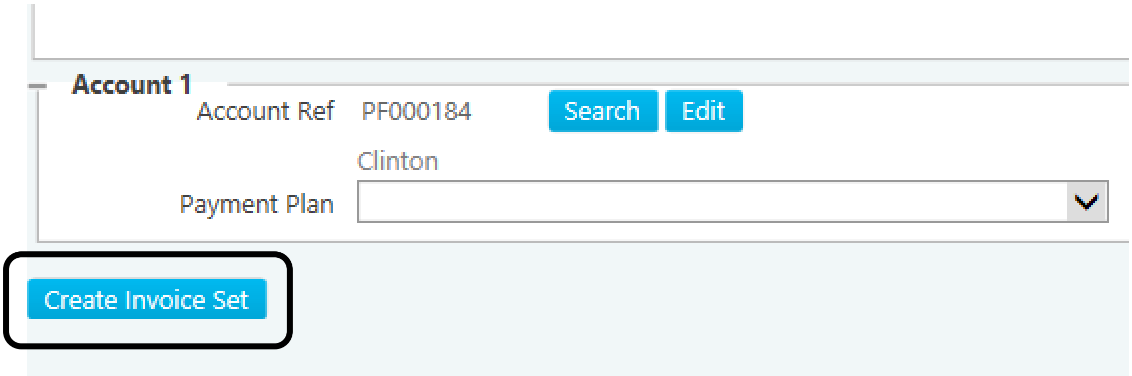


4. On the Account Edit screen, enter the details you wish to update in the equivalent fields, and click **Save Changes** e.g. An example of an alternate address being added.



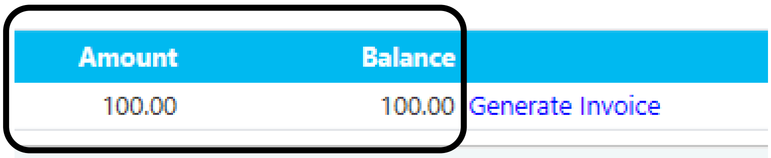
Creating Invoices

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



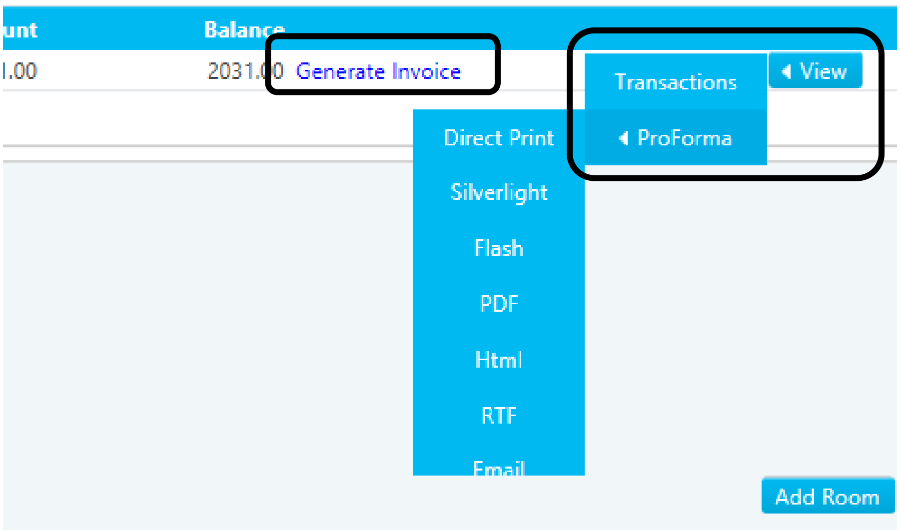
This will populate the information for the invoice. The **Amount** column displays the total cost of this invoice.

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



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

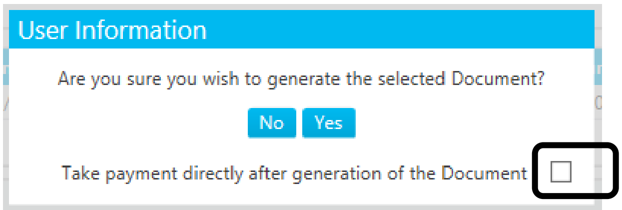
3. Click on **Generate Invoice.**



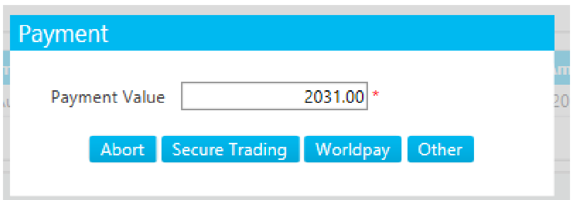
4. An information pop up box will appear.

5. 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**.

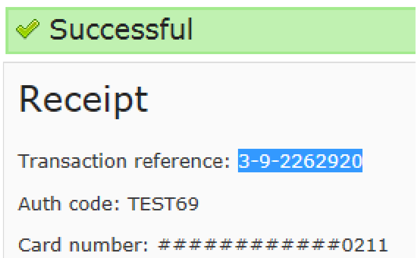
   If you are **not** taking payment at this point, ensure the “Take payment directly after generation of the Document” box is **not ticked** prior to selecting **Yes** (default).



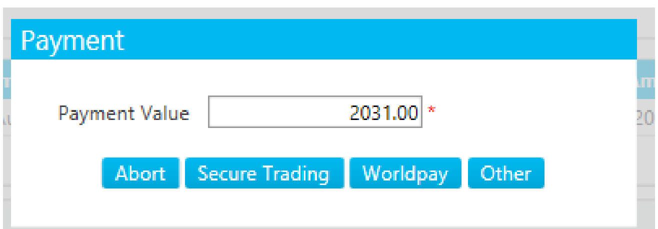
6. If you wish to take payment via Secure Trading, click on the relevant button which will take you directly to the right page to take payment.



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.

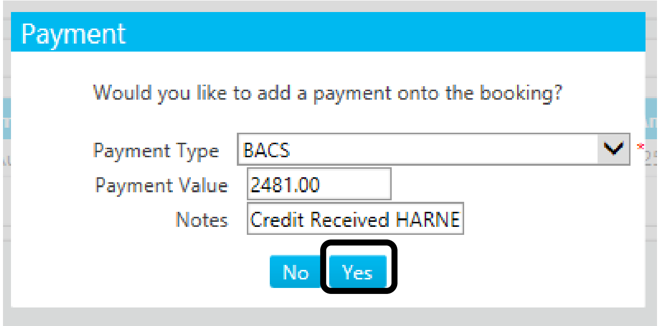


7. If the payment is not taken via online source, click **Other** and select relevant payment type.



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**.

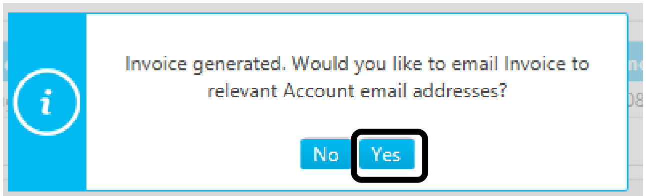
Select the Payment Type based on the method of payment used and the type of card used to pay – if applicable.



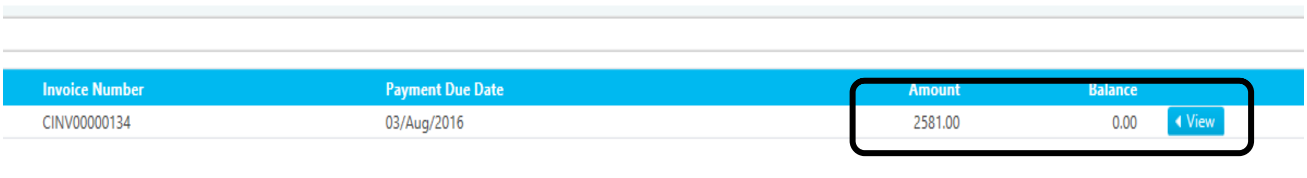
:

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.



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.

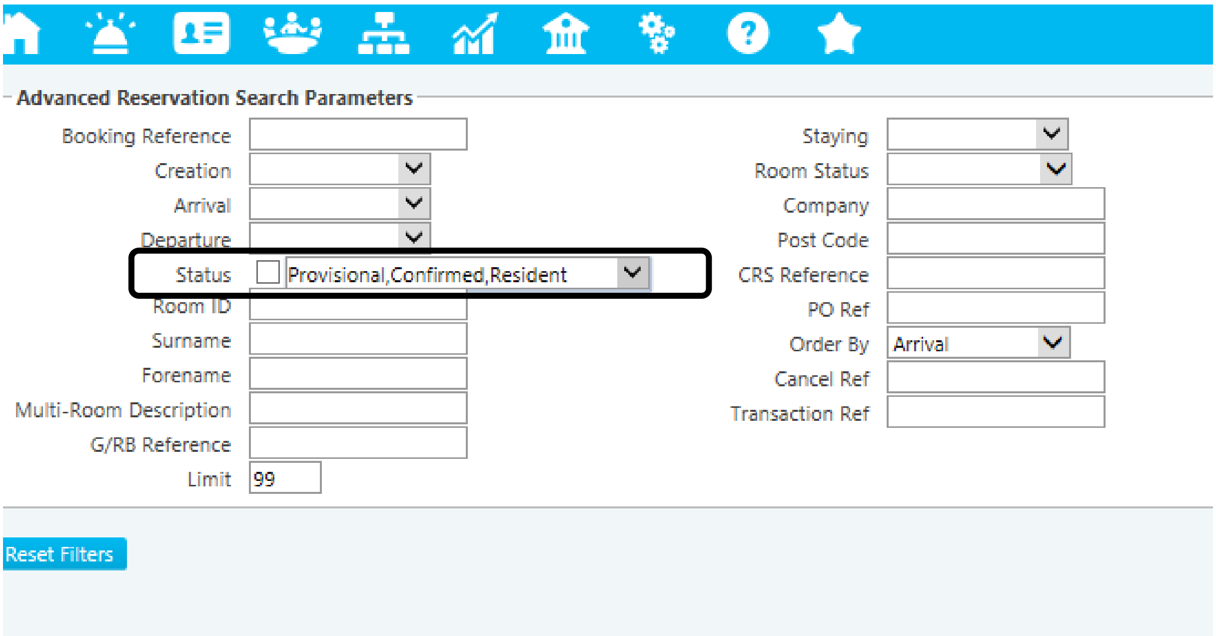
11. Send confirmation to the guest.

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.

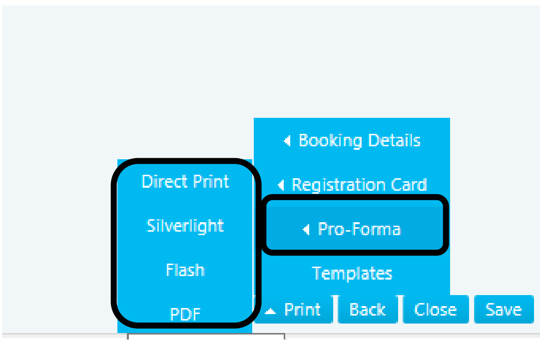
Commercial

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.



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

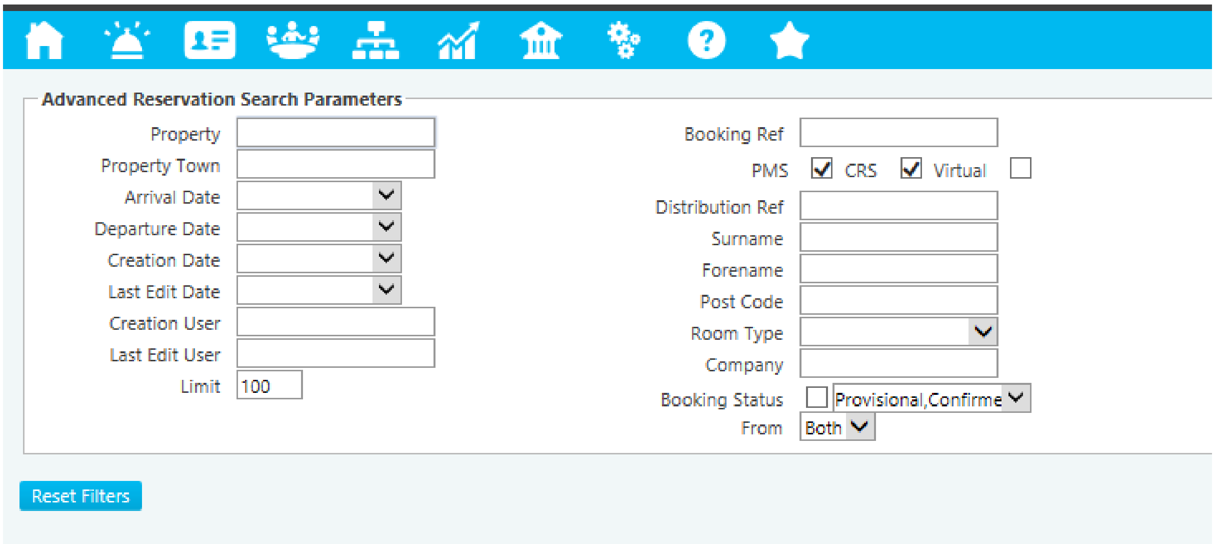
Mr Peter Parker
24 Morpeth Avenue
Borehamwood
Hertfordshire
United Kingdom
WD6 4BW

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

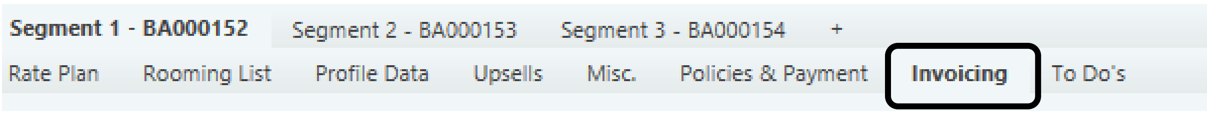
1. To view/print/email pro-forma go to CRS Module – **Search**
2. Search for the reservation you wish to view by any of the parameters available.

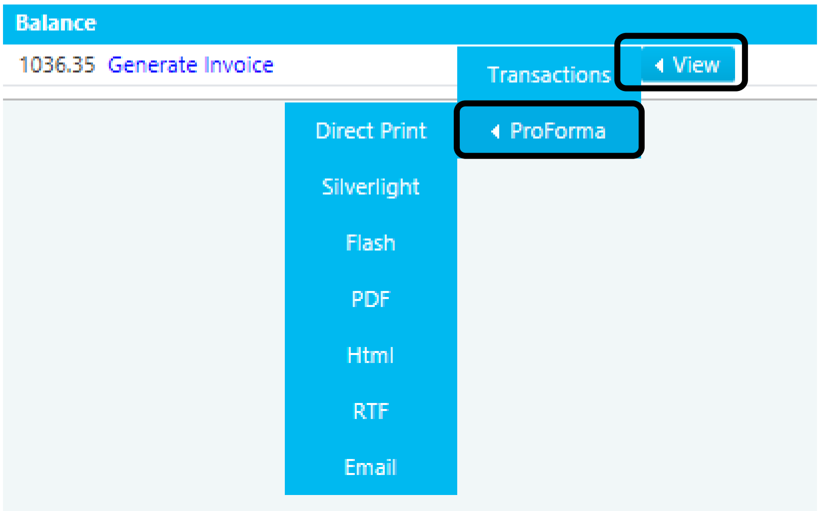


3. Once you have found the booking required, click the **CRS booking reference.**

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:



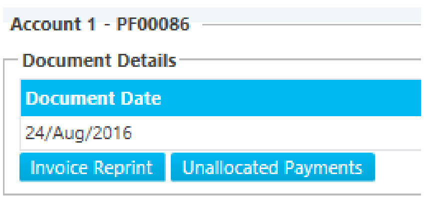


Invoice Reprint

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:



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

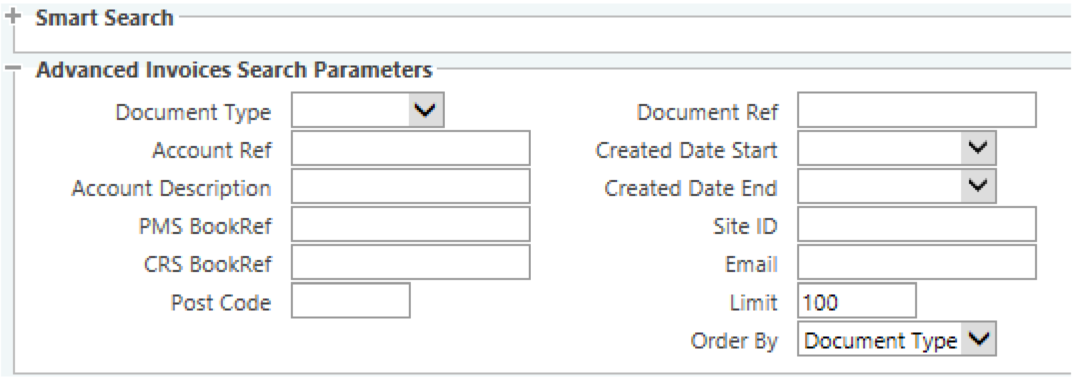
Attach To Email

☐	Options	Document Ref	Document Type	CRSBookRef	Site ID	BookRef	Account Ref	Account Description	Amount	
☐	View ▸	CINV00000146	Invoice	CRS00155	LSETTEST1	BK00235	PF00086	Booking	660.00	Edit
☐	View ▸	CINV00000147	Invoice	CRS00155	LSETTEST1	BK00235	PF00086	Booking	770.00	Edit
☐	View ▸	CINV00000148	Invoice	CRS00155	LSETTEST1	BK00235	PF00086	Booking	880.00	Edit
☐	View ▸	CCRD00000073	CreditNote	CRS00155	LSETTEST1	BK00235	PF00086	Booking	-660.00	Edit
☐	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.



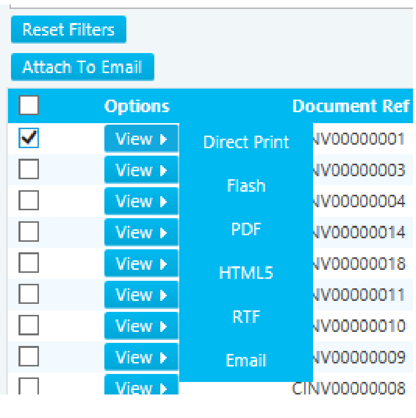
2. However, when the results are returned it will not state the name of the booking, it will state the following:

Document Ref	Document Type	CRSBookRef	Site ID	BookRef

Account Ref	Account Description	Amount

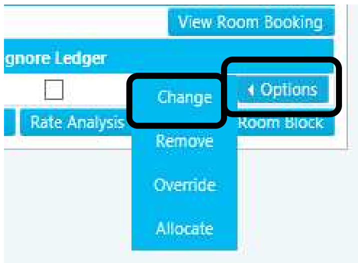
- Document Ref
- Document Type
- CRS Book Ref
- Site ID
- Book Ref
- Account Ref
- Account Description
- Amount

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.



Amending Dates

With Invoices having been Created Only

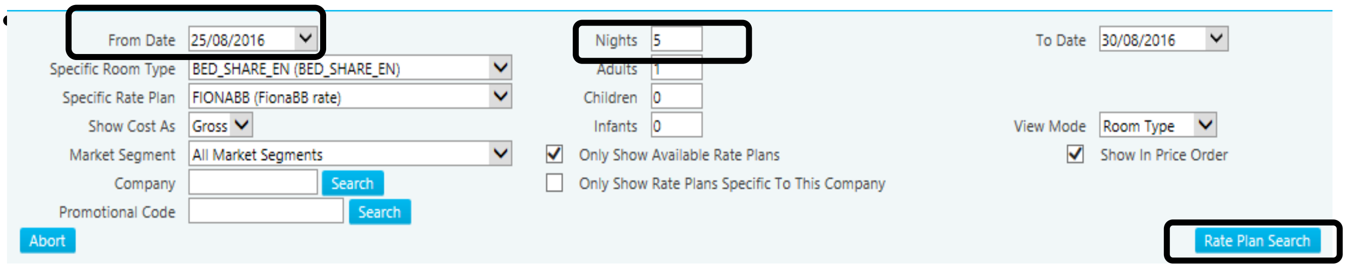


1. Make sure you are in the CRS booking.

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**.



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.

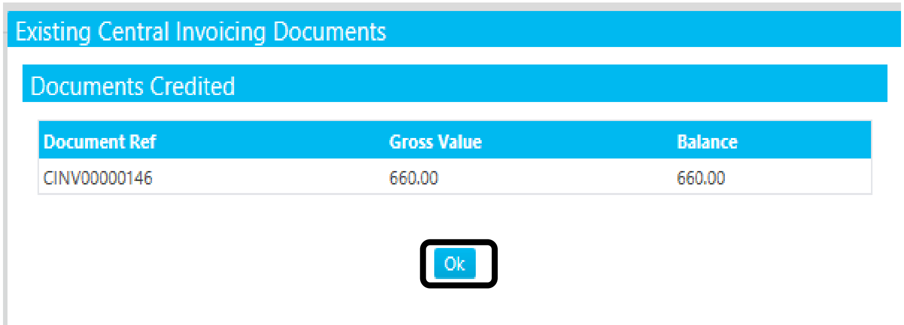
****Please note if you have sent the pro-forma to the client/company then this will have to be re-sent with the new cost of the stay****

With Invoices having been Generated

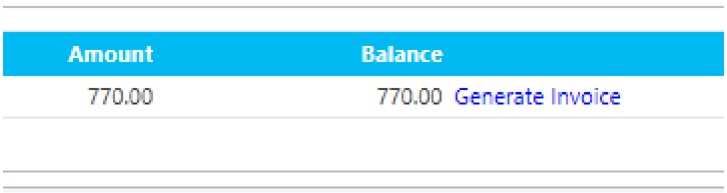
1. Follow the process above until saving the booking.

   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**



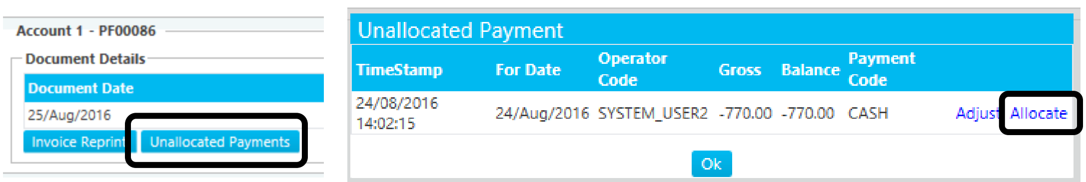
3. Click back into the **invoicing** tab – the invoice now needs to be regenerate as changes have been made.



   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.



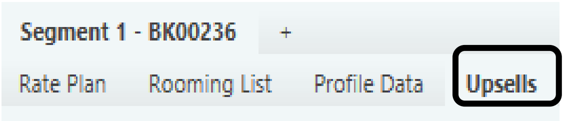
5. Choose if you wish to match/part match the payment and click **Save** once you have chosen.

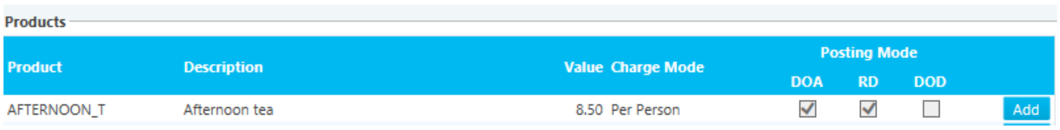
**Please note if you have sent the pro-forma to the client/company then this will have to be re-sent with the new cost of the stay.

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.

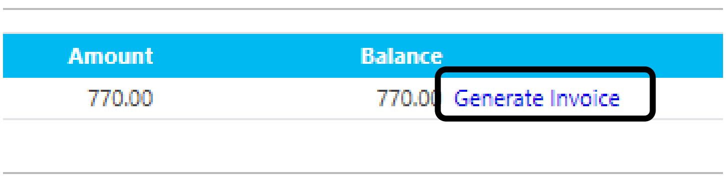
3. This will add the upsell onto the invoice total cost and no other changes are required.

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.



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

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

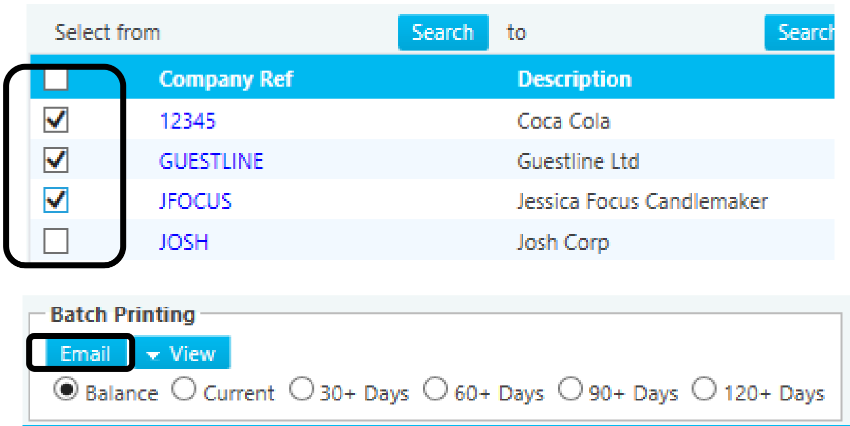
2. Select **Company**, **Aged Debtors**.

You are the in the 'PMS Aged Debt Screen' which is an overview of all account 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.

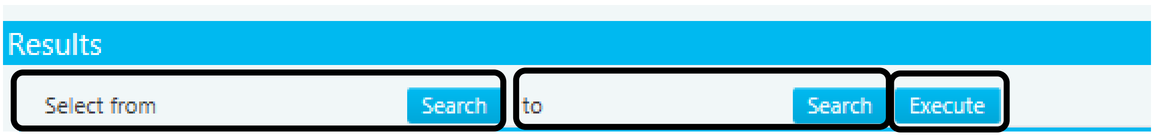
3. Tick the relevant company accounts and click the **Email** button to email a statement to the ticked company accounts. See image below.

   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.

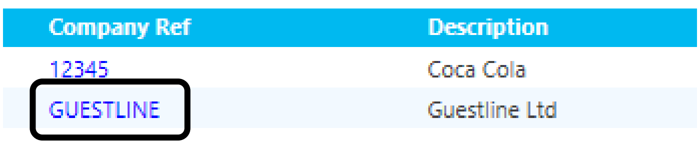


4. Each time a statement is emailed to a company, an entry will be added to the company's Chase Activity tab.

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.



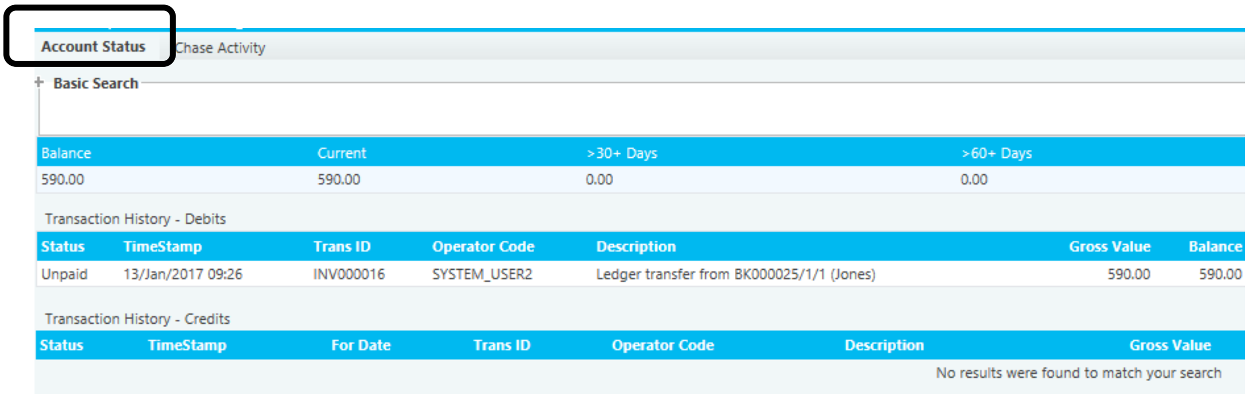
- After clicking on the **Company Ref** it will take you into the account for that company.



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.



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

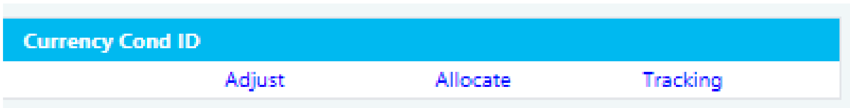
Edit Company - If any details i.e. address for the company were to change, this is one place where the information can be changed to the correct details.

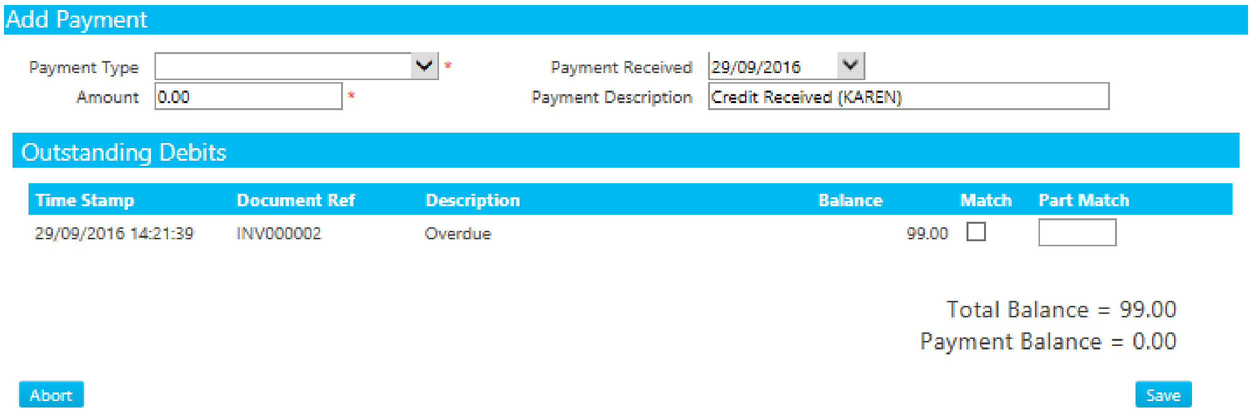
Pay/Allocate - If amount paid is incorrect in the payment screen you can use **'Adjust'** to amend.

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.





- 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 that 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

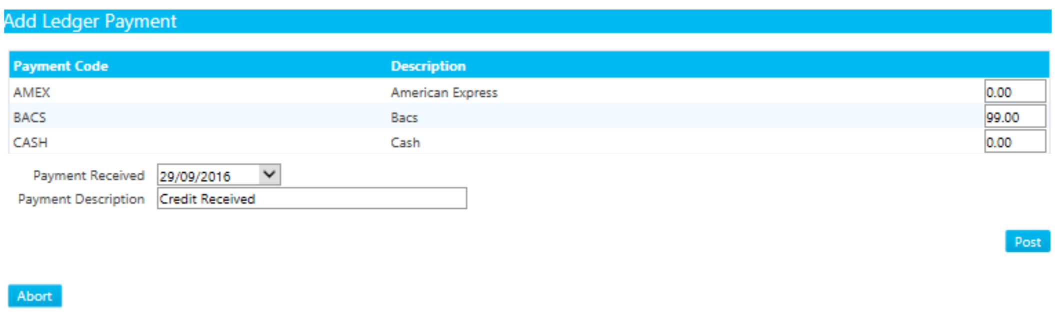
Payment

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.



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

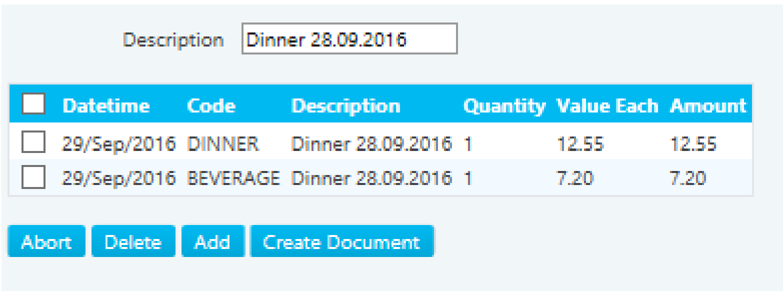
Create An Invoice: an invoice can be raised against a company profile account, increasing the debt.

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

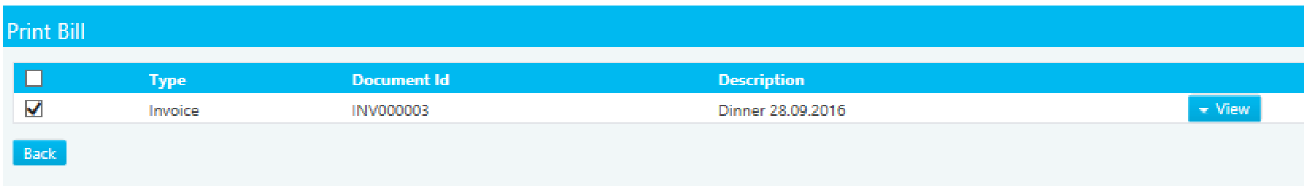
The Invoice Transactions page is used to build up a list of transactions which are then charged to the ledger account. When adding a charge to a ledger account, the correct analysis code has to be used in order to increase the correct type of business.

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.

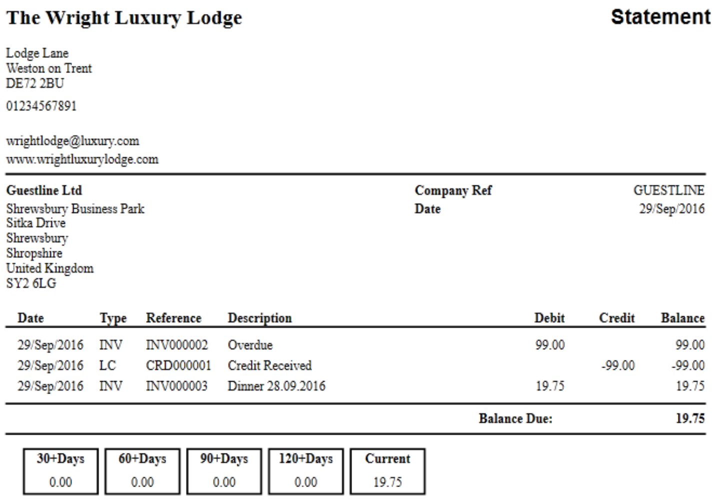


- Clicking the **'Cancel'** button will close the page and return the operator to the **'Account Status'** tab;
- clicking the **'Post'** button will post the credit transactions and display the Print Bill page:



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 GUESTLINE
Date 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

Balance Due: **19.75**

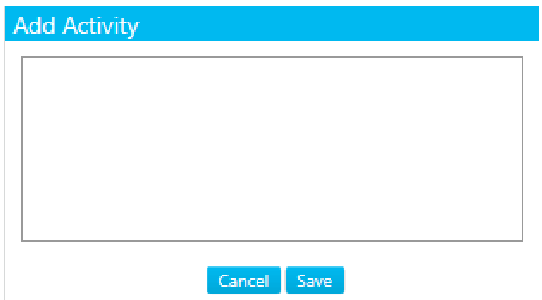
30+Days	60+Days	90+Days	120+Days	Current
0.00	0.00	0.00	0.00	19.75

Chase Activity

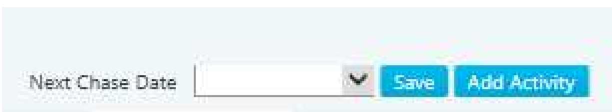
The **Chase Activity** tab is used to log all relevant notes against the company profile.

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.

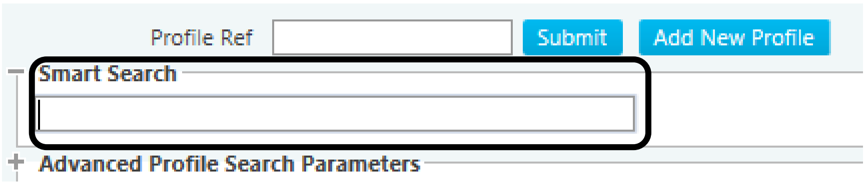


Profiles

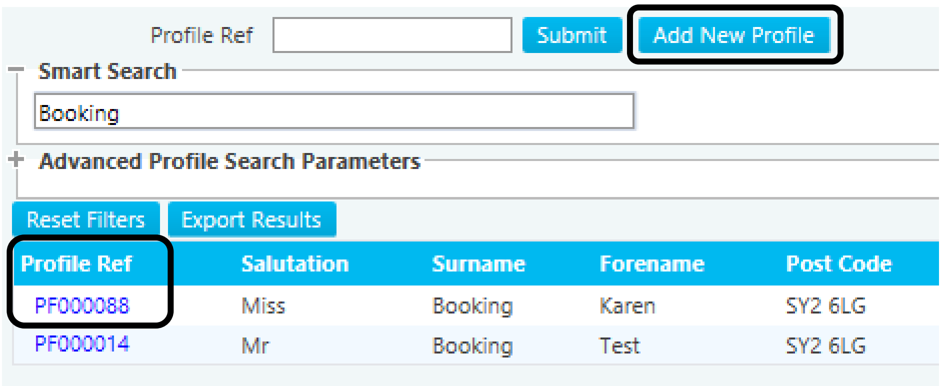
People Profiles

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.



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



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 Inormation, Address, Contact Information, Perferences, Attributtes

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.

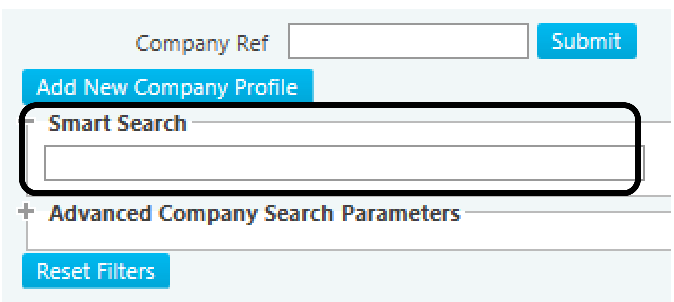
8. At the bottom of the page from clicking **Billing Addresses**, you can to add three further addresses which you can use to replace the profile address on an invoice with an alternative one.

9. Once are relevant fields are completed, click on **Save Changes**.

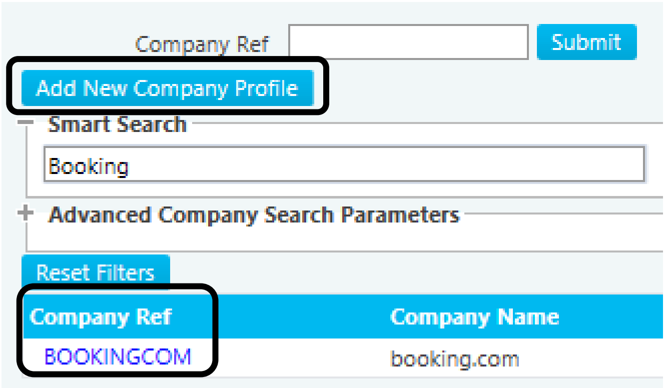
Company Profiles

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.



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



6. 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

7. More tabs will appear upon saving the profile.

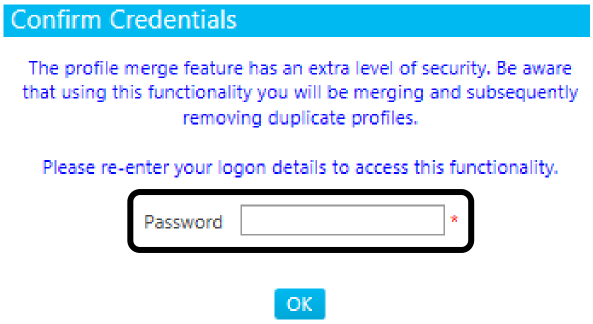
Statistics will take you to the Company Production report showing the details for the company regarding number of nights sold, company revenue generated, etc.

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

8. Once are 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.

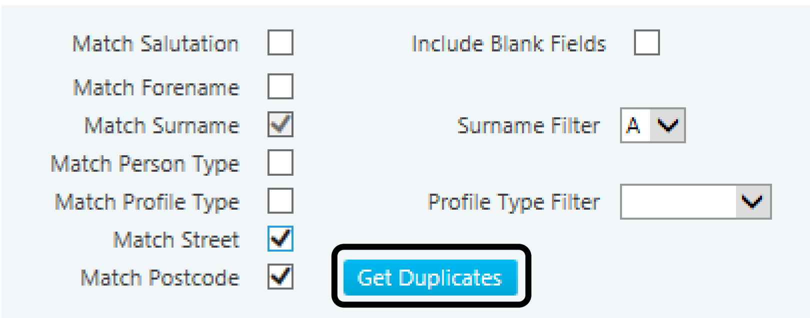


There are 2 options to merge profiles. **Batch Merge** or **Individual Merge**. See below.

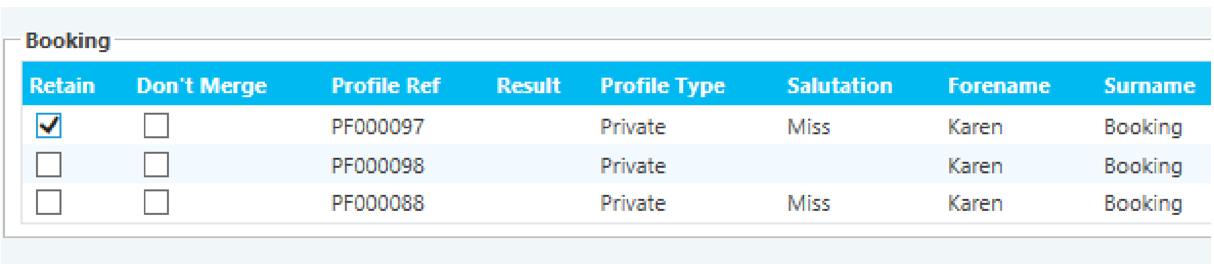
Batch Merge

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

Click **Get Duplicates**.

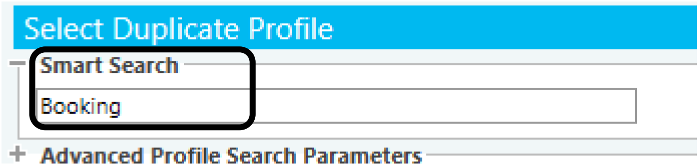


From the results returned you can decide which profile to retain or if you do not want to merge a particular profile.

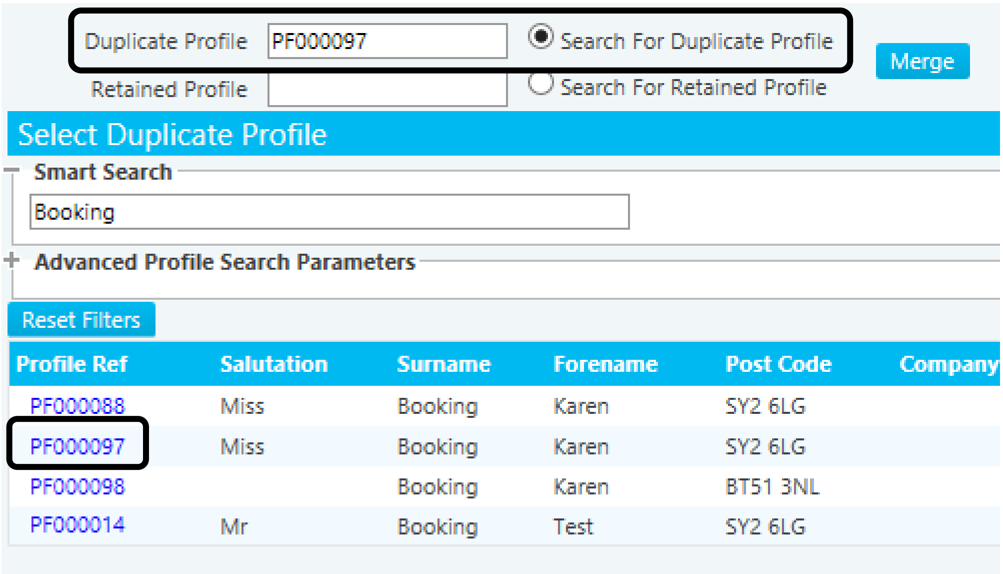


Individual Merge

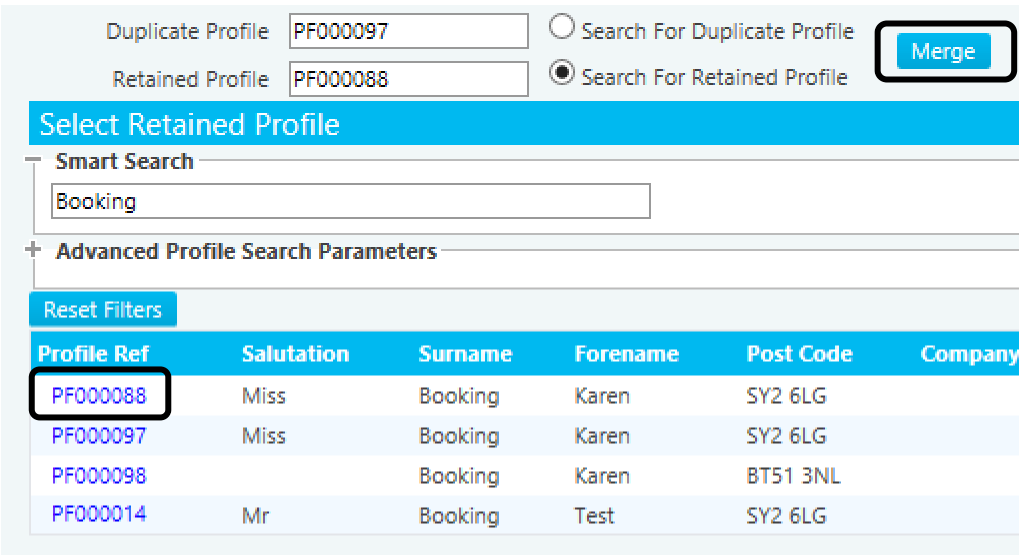
1. Search for the surname of the profile you would like to merge.



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



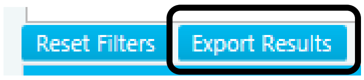
3. Select the profile your wish to retain, then click **Merge**.

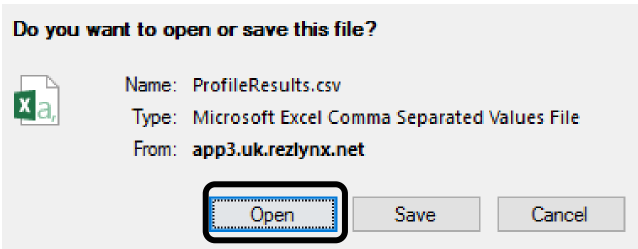


Profile Export

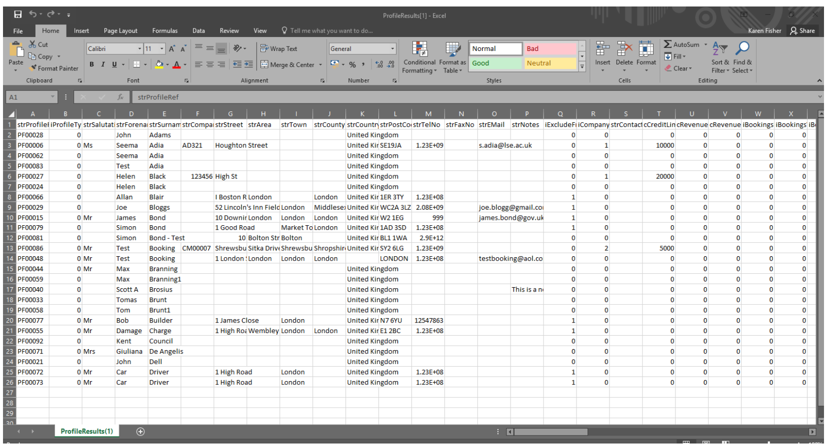
1. Click on the **Profiles** icon (ID Card).
2. From **People** click on **Search**.
3. Click **Search** to return all profiles.

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.



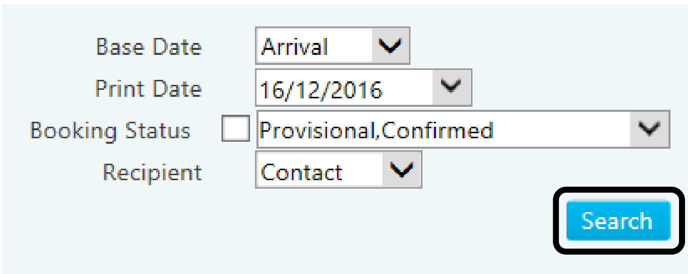
Batch Printing

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

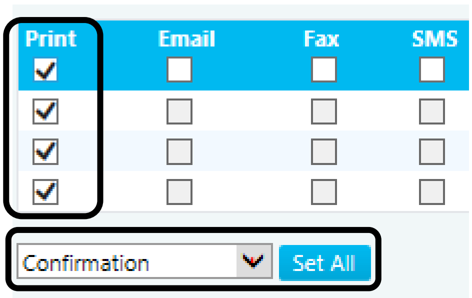
You can print by the following:

- *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**.



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



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

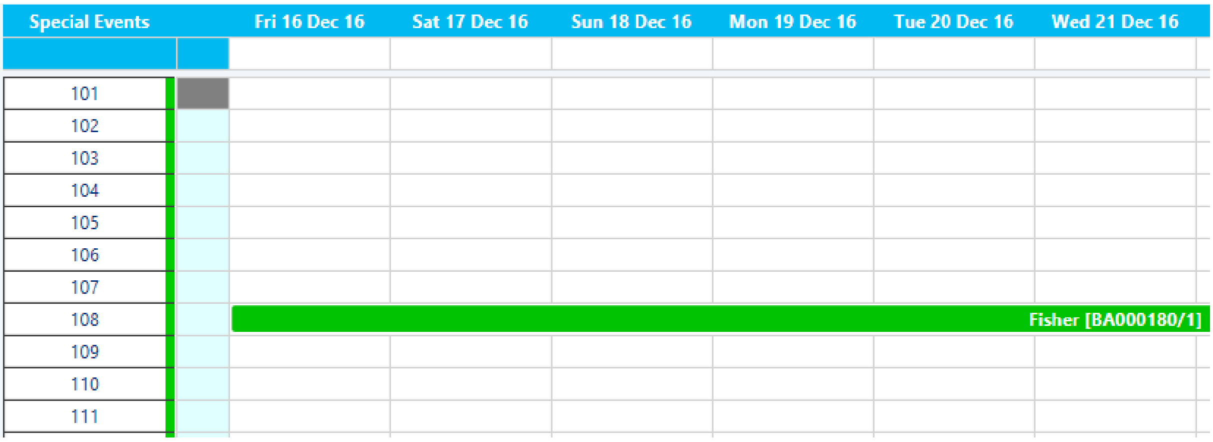
At the bottom of the availability screen:

- 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.



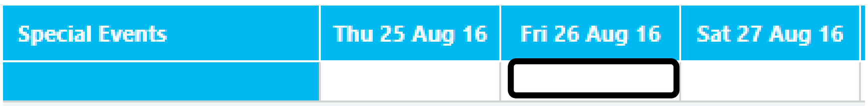
Special Events

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.**

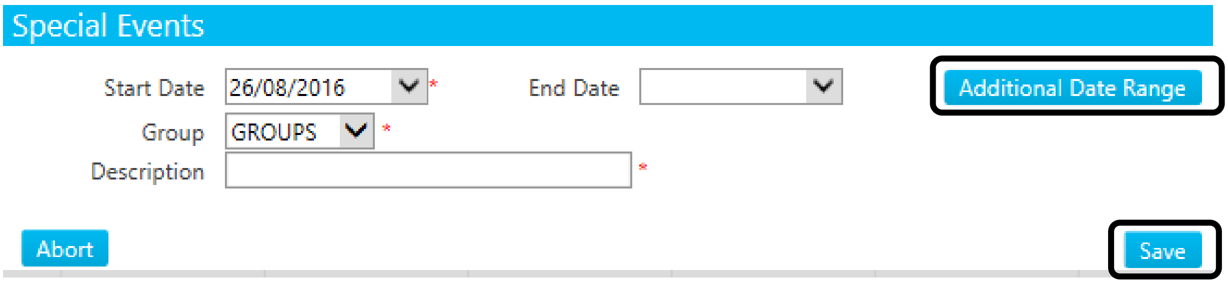
Special Events will show on the following:

- 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.



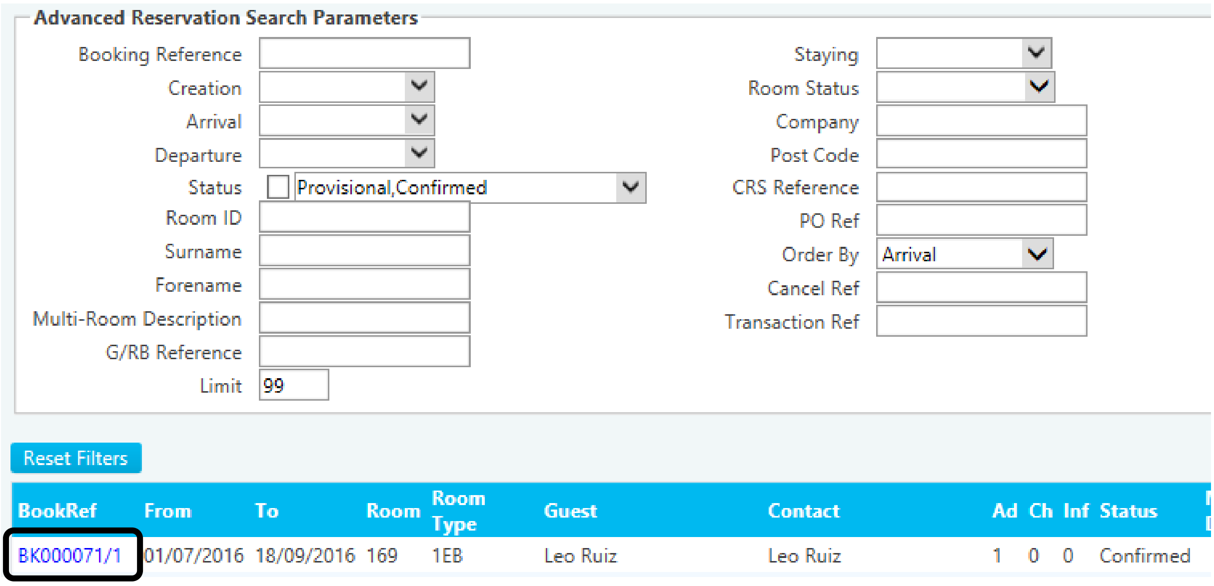
2. Choose your dates, group and description of the event and click save. (choose additional date range to add in many events in one go).



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

Resident (In-House) Reservation Search

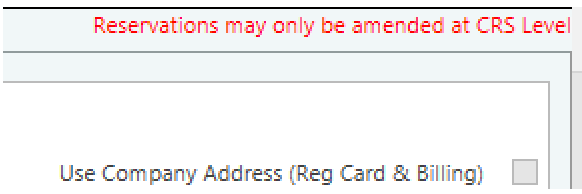
1. Click on the **Guest Journey** icon (bell).
2. From **Reservations** click on **Search.**
3. Search for the booking using the search parameters.



4. Click on the **BookRef** to enter the booking.

5. PMS level search field for reservations, for viewing only, mainly for FOH information.

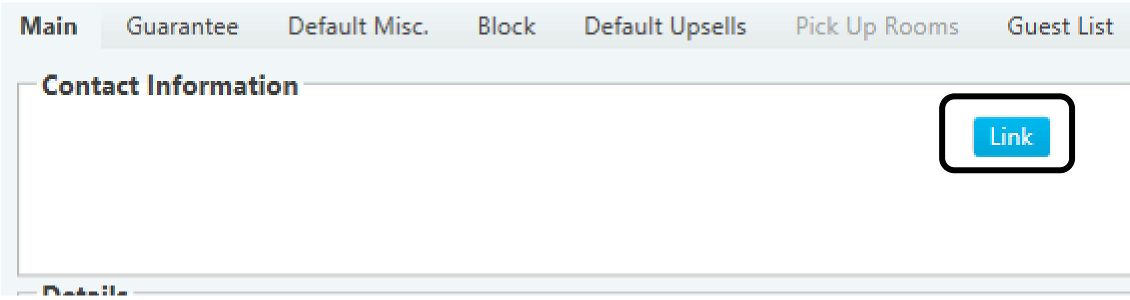
**NB Bookings cannot be amended here **, when you click into a booking a notification appears like this image on the top right of the reservation.



Groups

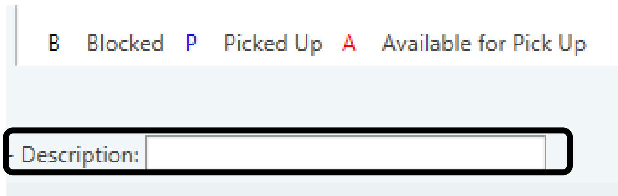
Creating a group

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.

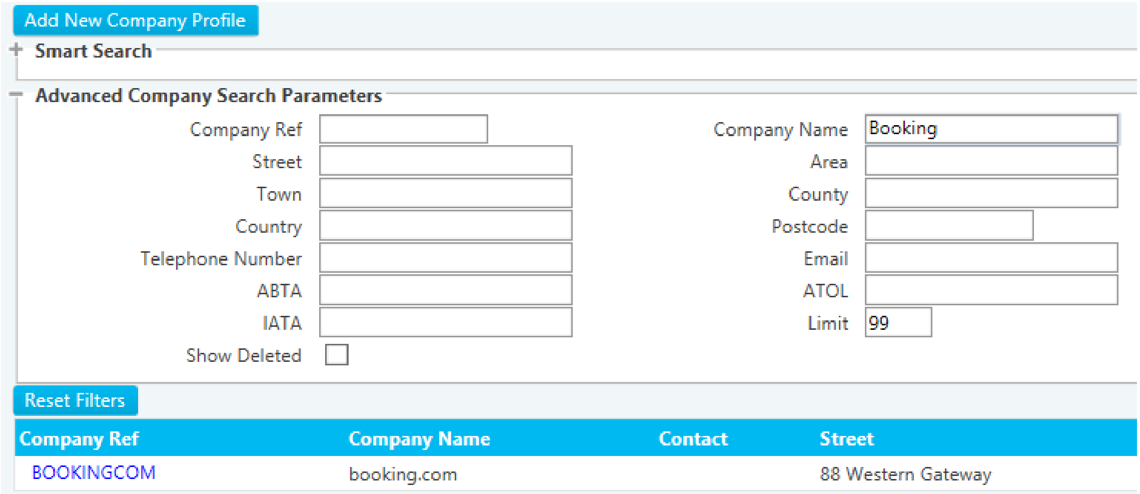
4. Enter a **Group Description**. For example, a wedding group might be called JonesSmith210916.



Linking a Company and/or Agent

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

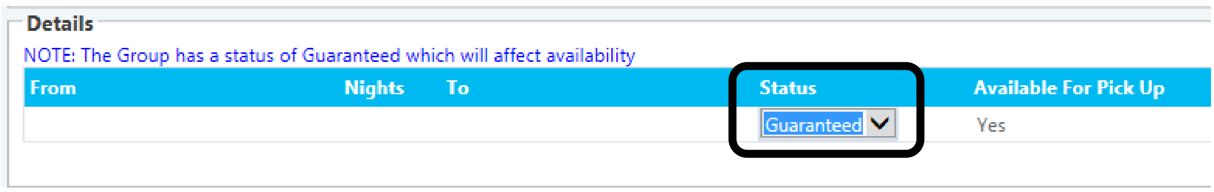
2. Search for the company using the parameters. If the profile exists click on the **Company Ref**, if it does not click **Add New Company Profile#**



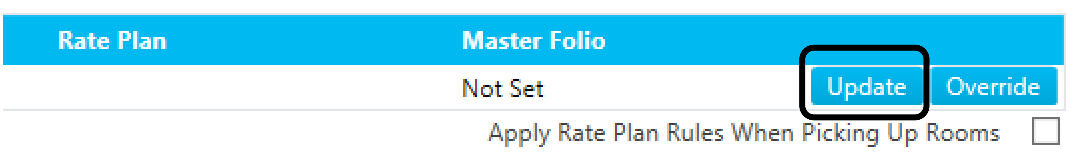
Please see Company Profiles for more guidance.

Details Section

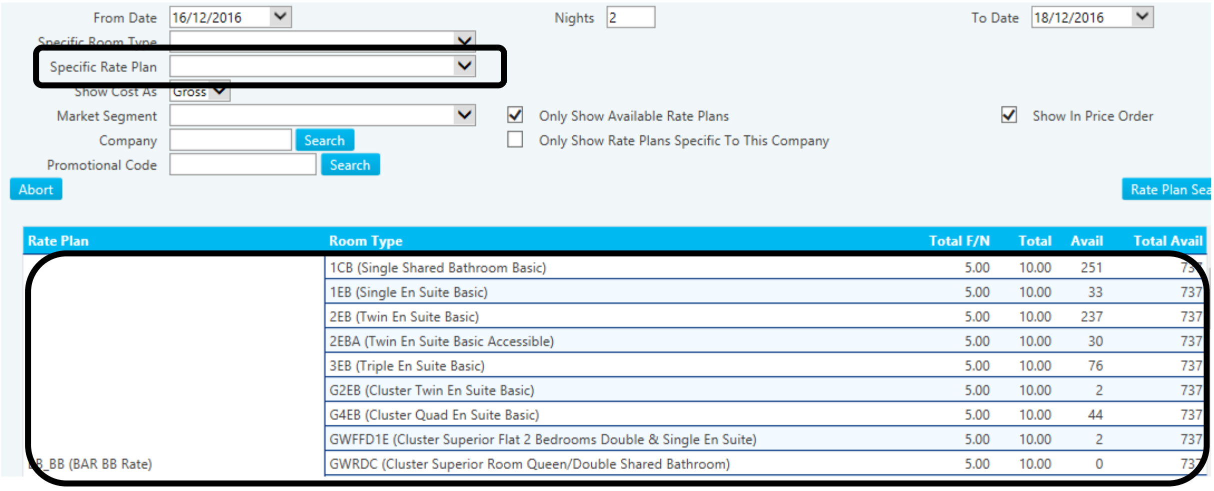
1. Select your **Status**. Ensure you select a status which will affect your availability if you want to take the rooms out of your stock to sell for those night/s.



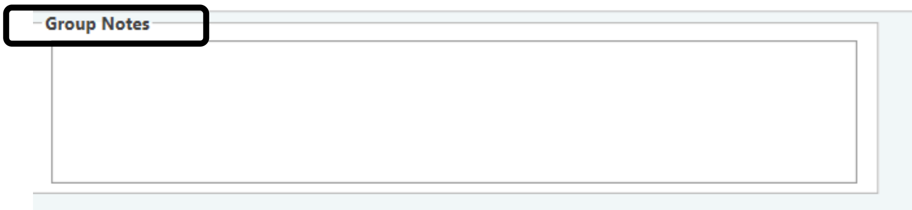
2. Click **Update** which will launch the rate plan search screen. Search for your required dates, number of nights and required rate plan.



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

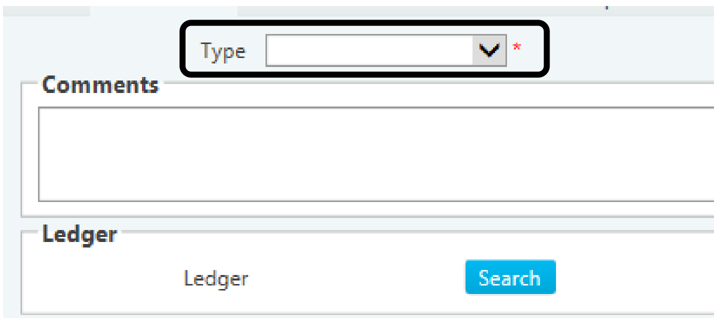


4. **Group Notes** can be added. These notes will only stay on the main page of the group booking.

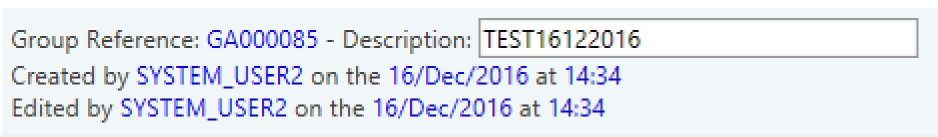


Group Booking Tabs

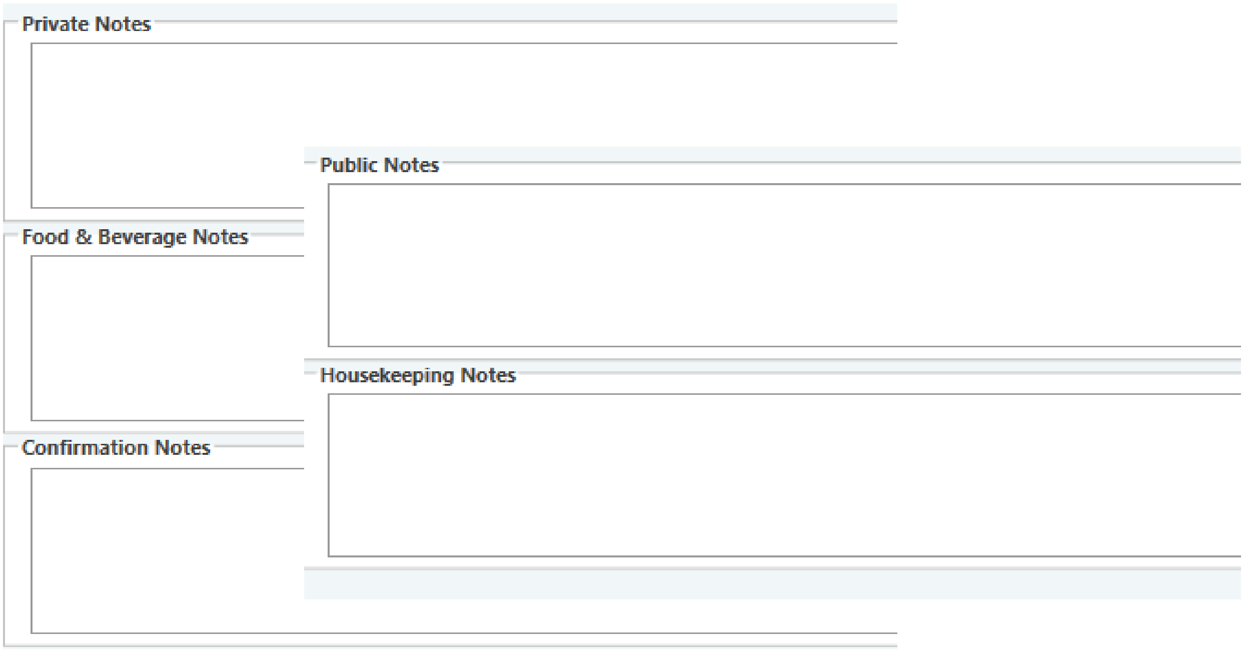
5. Click on the **Guarantee** tab and select your pay **Type** information.



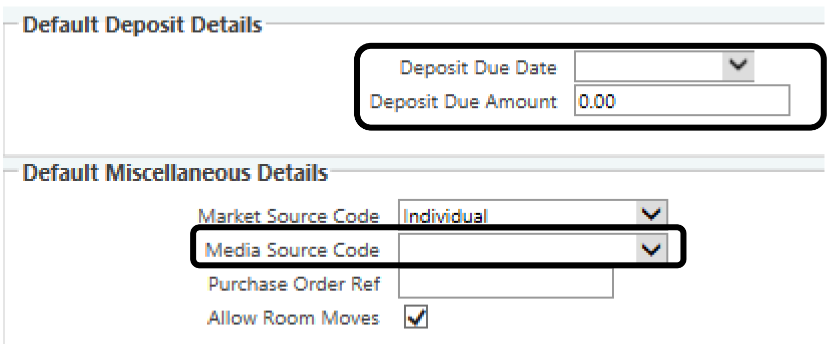
6. Click **Save** to generate the Group Booking Reference.



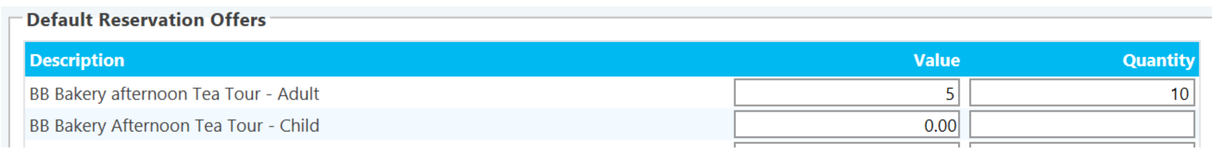
7. Click in the **Default Misc.** tab to enter notes to each room, any notes populated here will copy to bedroom bookings as they are picked up.



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

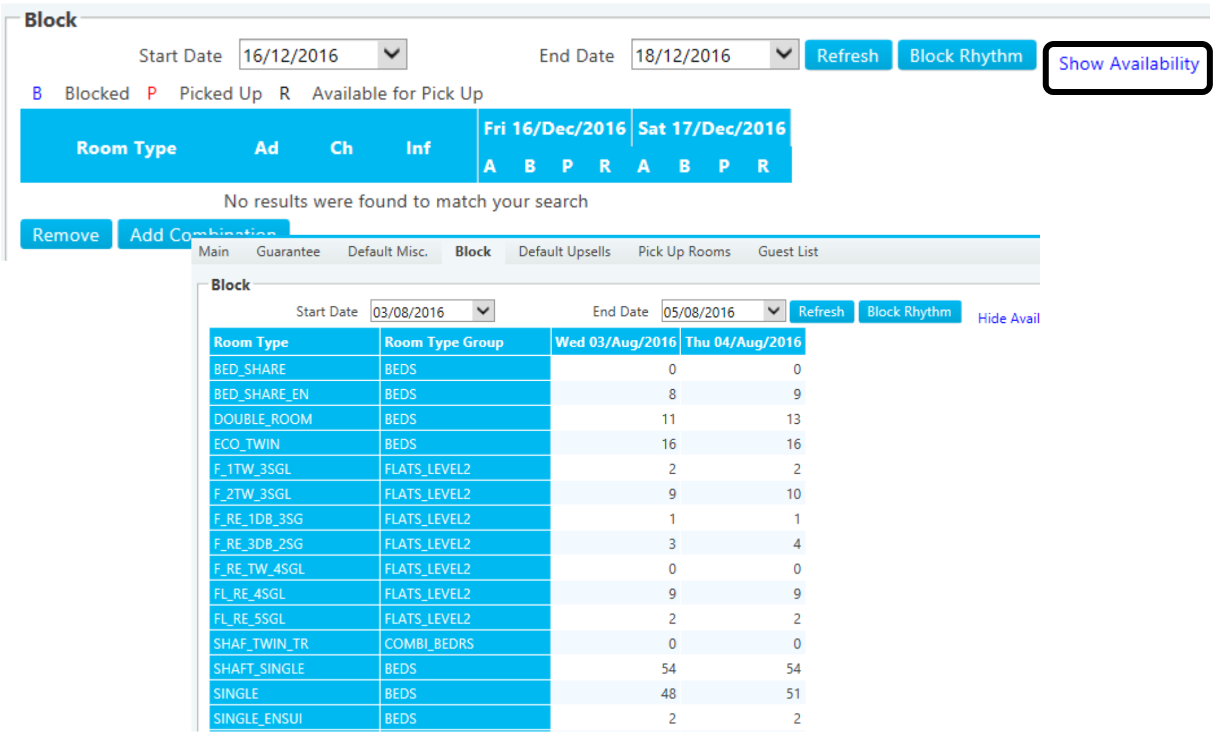


9. Select the Default Upsells tab this can be used at any stage prior to picking up your rooms to ensure that chosen products are posted onto the reservations as they are picked up.

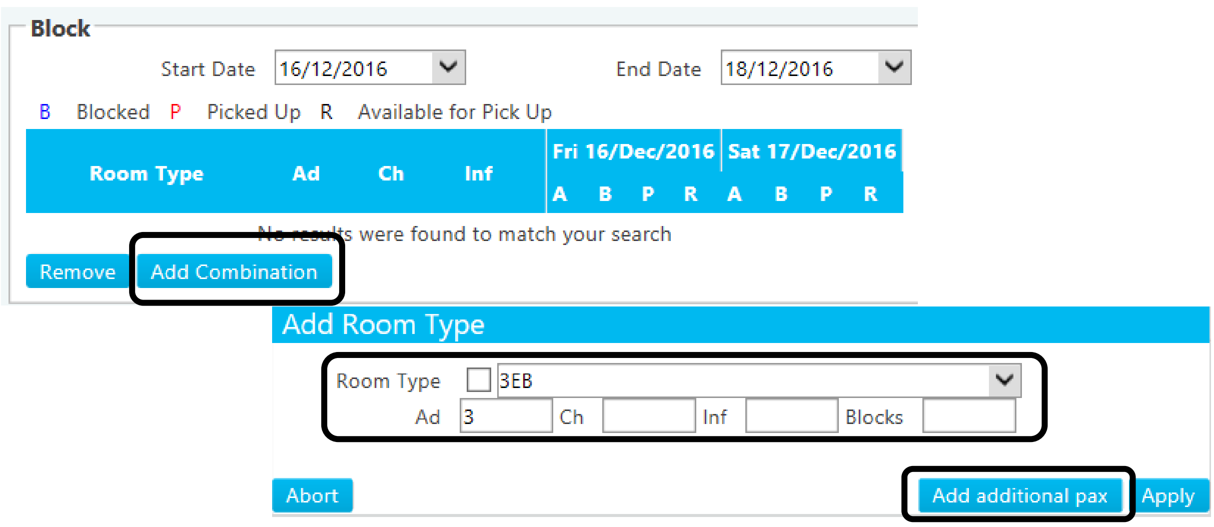


Add/Remove Rooms

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



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.



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.

A = number of rooms of that type available

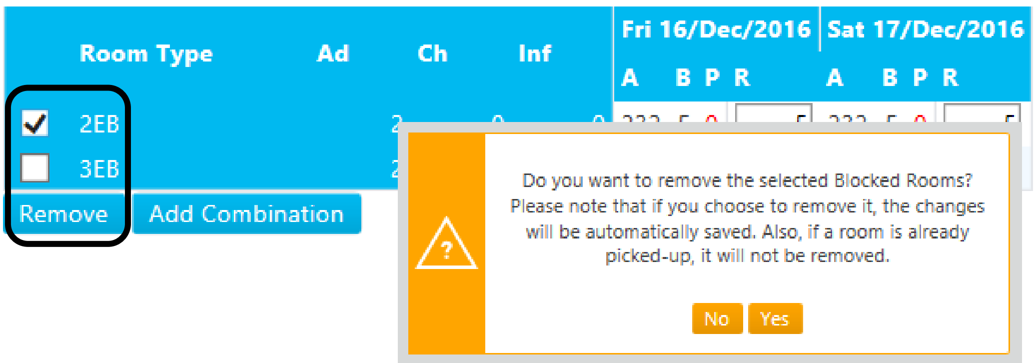
B = number of rooms blocked of that type (as above)

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.

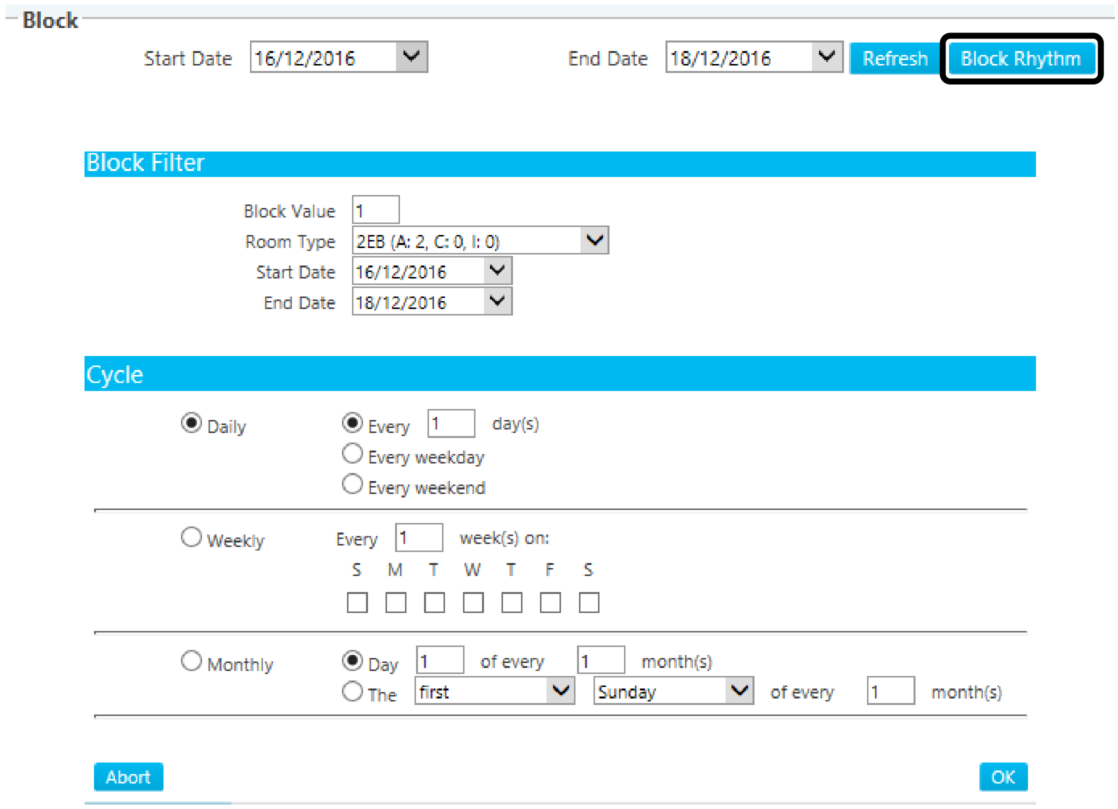
5. To remove one of your combinations, select the room type and click **Remove**. The following warning message appear. Click **Yes**.



Block Rhythm

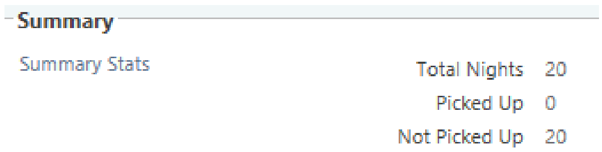
Allows you to add the number of rooms required per night in one step, rather than filling in each box individually.

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



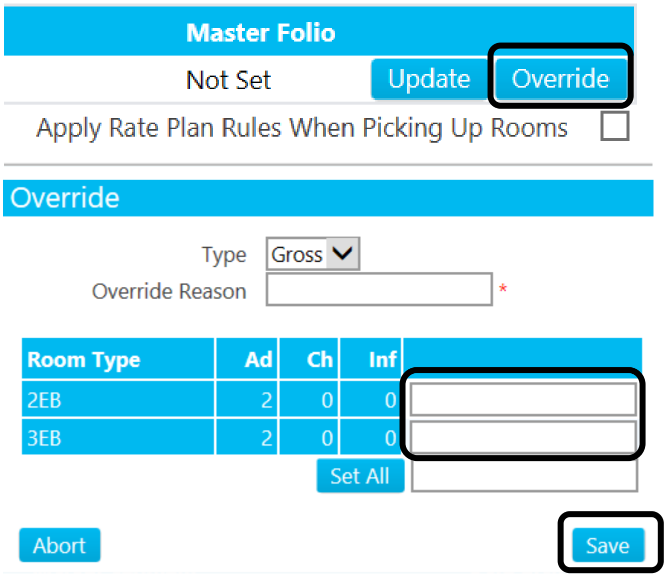
2. Fill in the criteria required.
   - **Block Value**: Number of rooms required
   - **Room Type**: Select which combination you want to fill, so if you've select a combination for 1 adult and 2 adults, it will provide a drop down for this selection
   - **Start/End Date**: Which nights you wish to 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.



Override

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



2. Type the desired rate into the box next to the room combination.

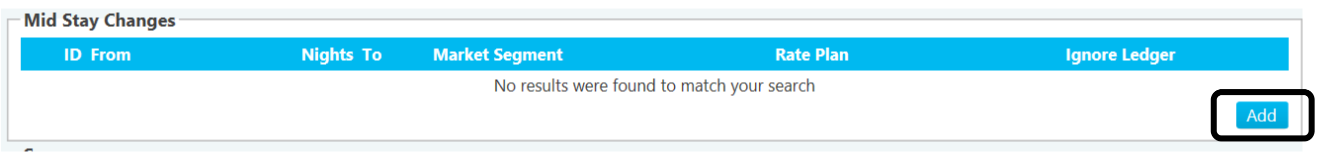
3. Type in an override reason.

4. Click **Save**.

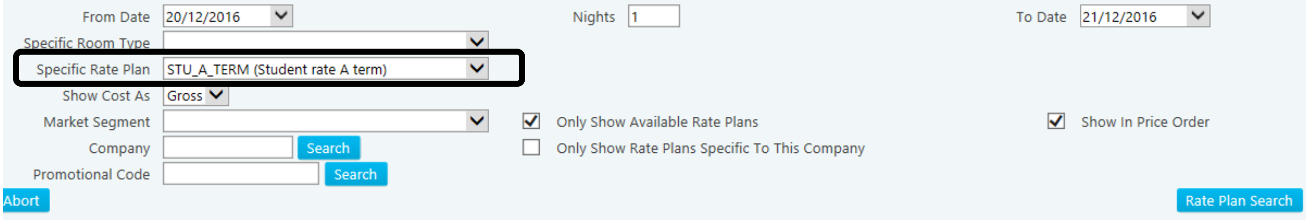
Rate Plan Change

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

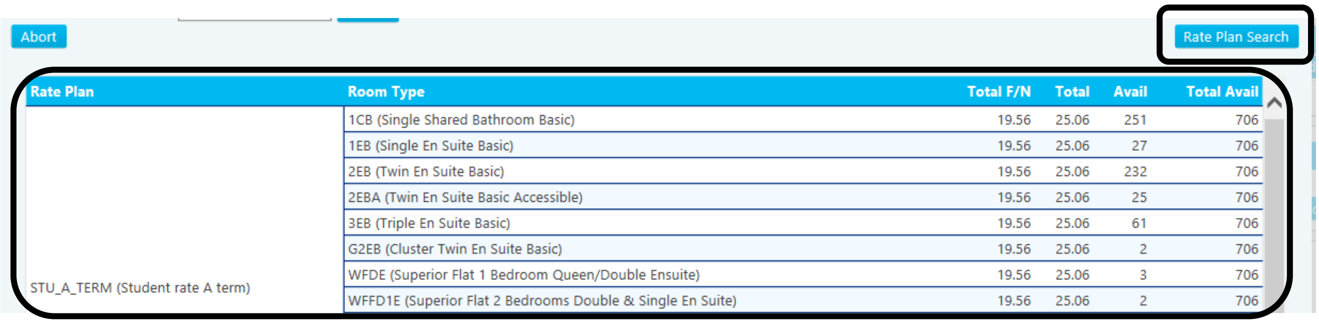
1. From the **Main** tab under **Mid Stay Changes**, click on the **Add** button.



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



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

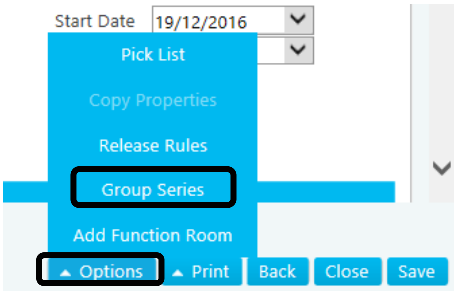


Rate Plan	Room Type	Total F/N	Total	Avail	Total Avail
	1CB (Single Shared Bathroom Basic)	19.56	25.06	251	706
	1EB (Single En Suite Basic)	19.56	25.06	27	706
	2EB (Twin En Suite Basic)	19.56	25.06	232	706
	2EBA (Twin En Suite Basic Accessible)	19.56	25.06	25	706
	3EB (Triple En Suite Basic)	19.56	25.06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

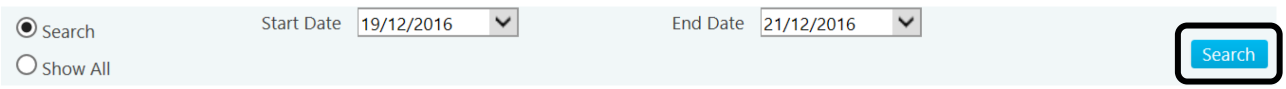
4. The Mid Stay Change once selected will update on the line.

Group Series

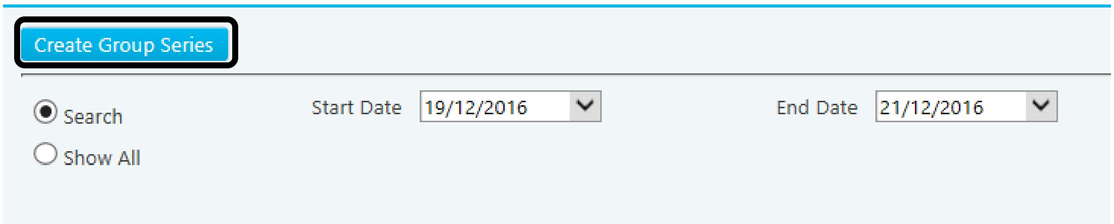
1. Select **Options** button, click on **Group Series**.



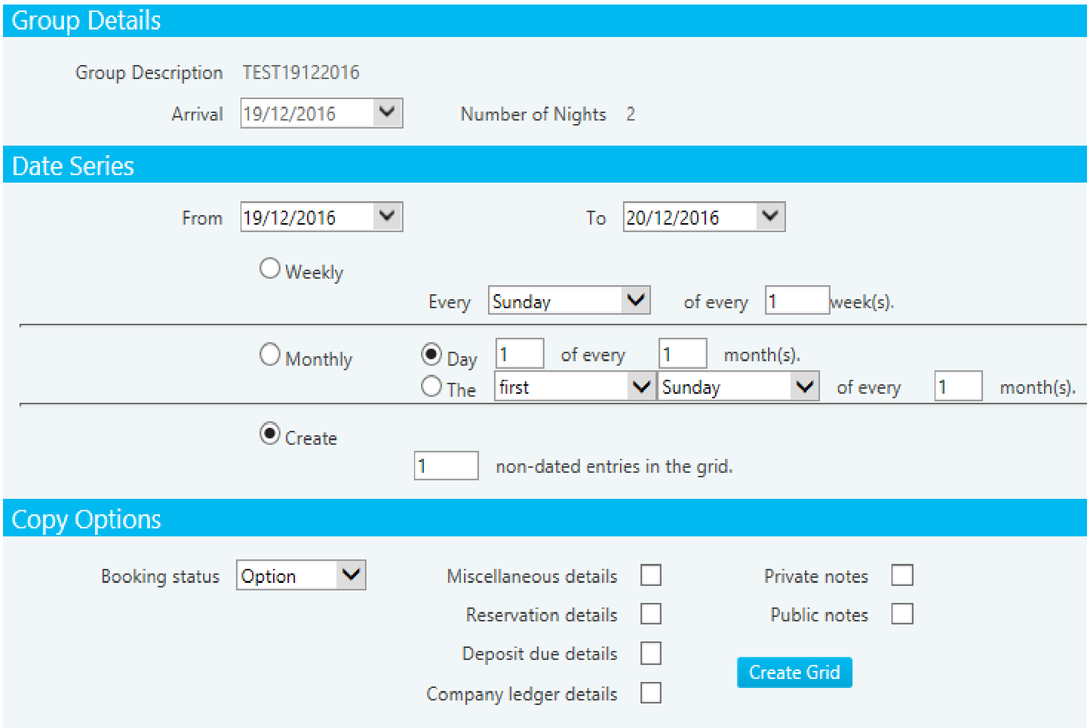
2. Click on **Search.** This will show any groups already associated.



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

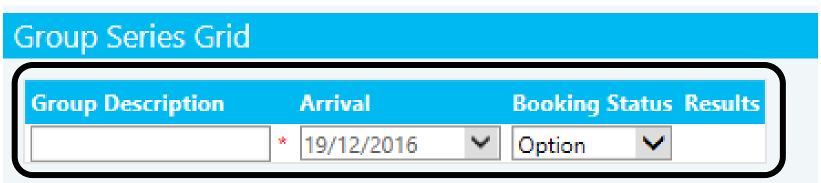


4. Complete the details for the Group Series you are creating. Click **Save** once completed.



- **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



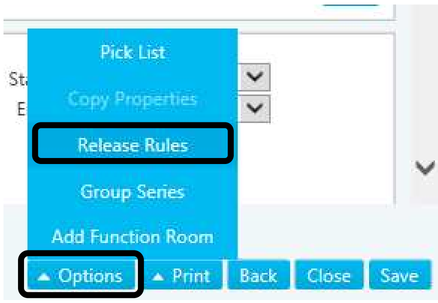
5. Free-type the name of the group, set the arrival date on each row & change the booking status.

6. Click **Save**.

Release Rules

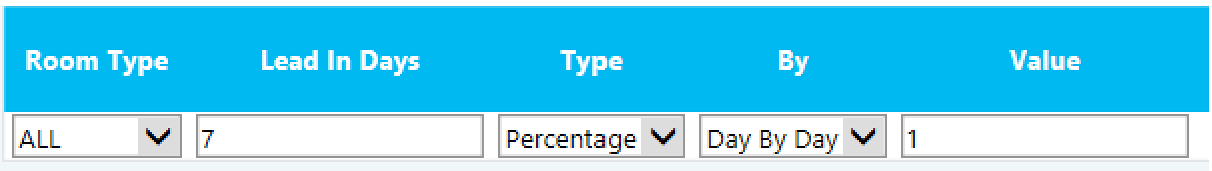
Allows automated room release into availability, avoids having to manually release rooms.

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



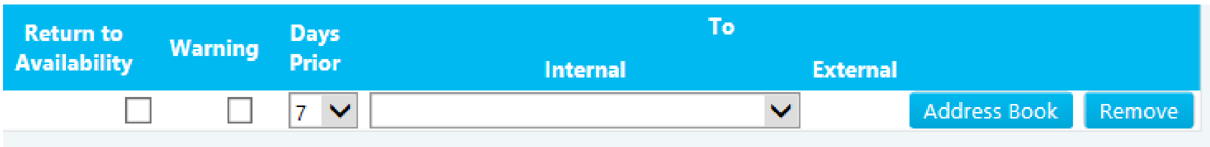
2. Click the **Add** button.

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



- **Room Type** - 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.



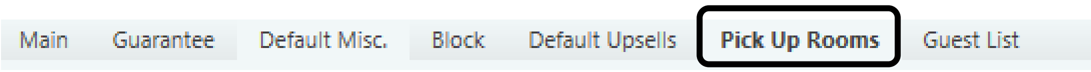
- **Return to Availability** - Un-picked-up rooms will go back to the hotel availability.
- **Warning** - Should the system generate a warning, either to you, your guest or both?
- **Days Prior** - days prior to the release date would you like to receive a warning?
- **Internal** - Warning is sent to 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.

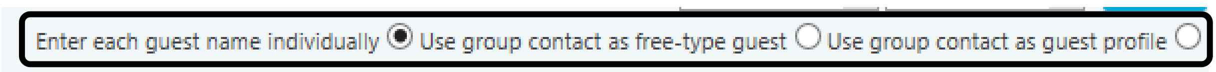
Picking Up Rooms

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

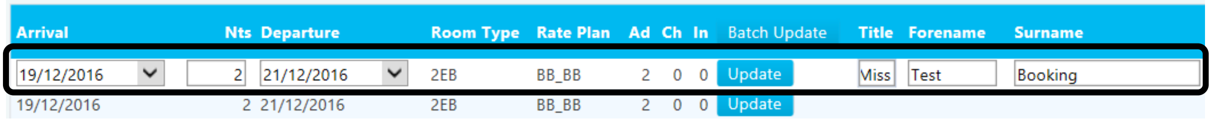


2. Choose how to pick up your rooms & Refresh:

- free type the name when clicking into any of the title
- use the group contact name
- use the group contact profile (LINKED)

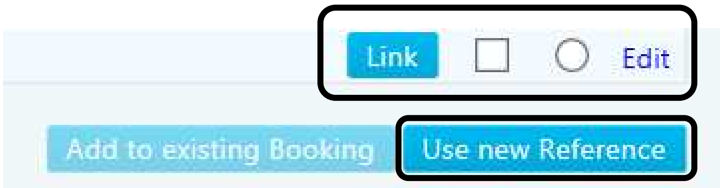


3. Click on the blank line on the booking to enter the details.



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			

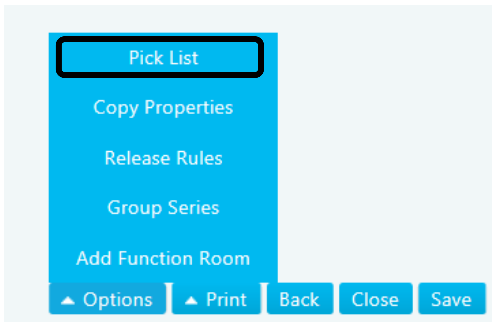
4. **Link** the profile if a profile exists, tick the **P/U box** for the first reservation to pick up, then click **Use New Reference.**

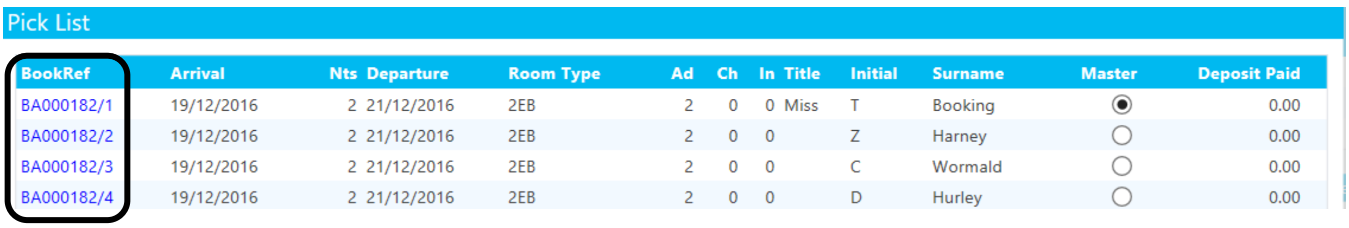


5. To pick up the remaining rooms click on the P/U after filling in the names, click **Add to Existing Booking.**

Pick List

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





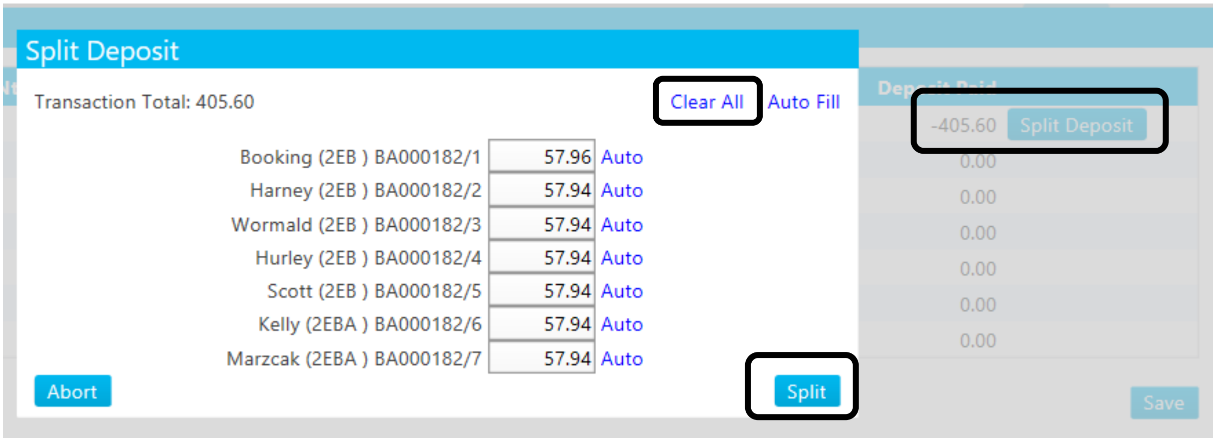
Pick List

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	◉	0.00
BA000182/2	19/12/2016	2	21/12/2016	2EB	2	0	0		Z	Harney	○	0.00
BA000182/3	19/12/2016	2	21/12/2016	2EB	2	0	0		C	Wormald	○	0.00
BA000182/4	19/12/2016	2	21/12/2016	2EB	2	0	0		D	Hurley	○	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 spilt 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.**

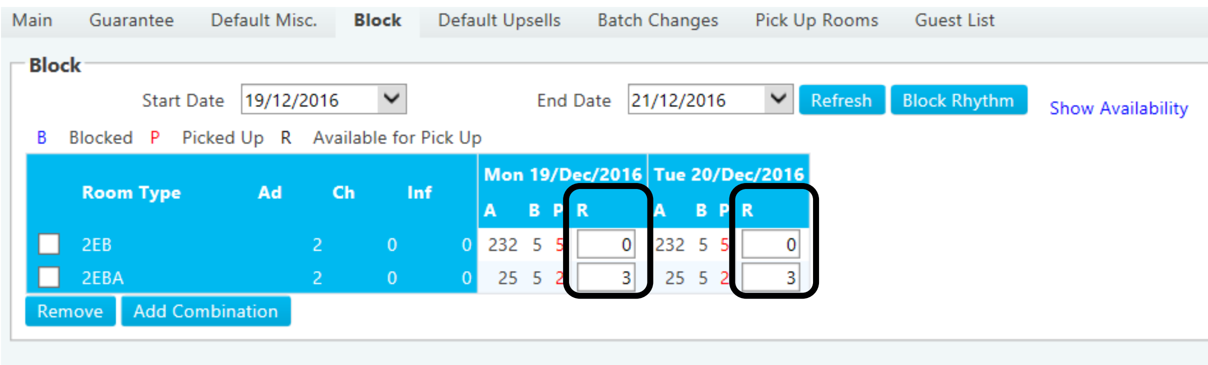
Group Changes

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**.**

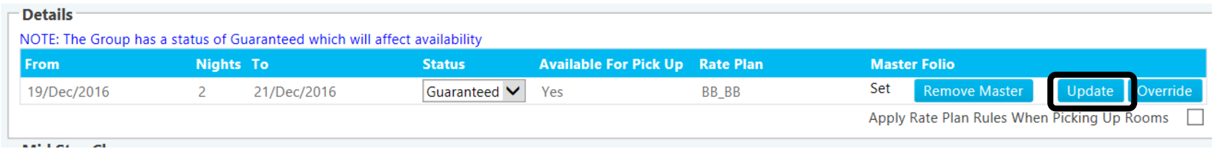
2. Click **Save.**



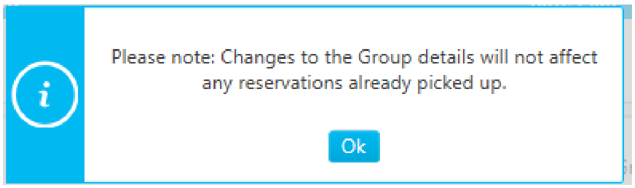
3. To change to a whole new set of dates, remove the blocked rooms first.

4. Click **Save**.

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



You will see the below message:



6. Click **Ok** to proceed to Rate Plan Search and then search for availability/rates based on the new dates required.

7. Go to the **Block** tab, add your rooms back on.

8. Click on **Save.**

Rooms which have been picked up:

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

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

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

You will have Four Options:

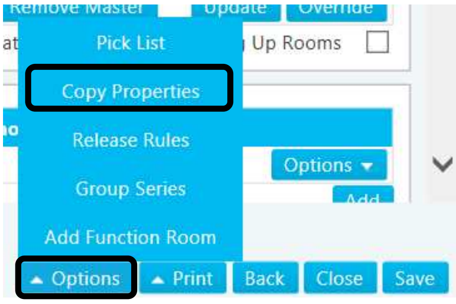
- **Add Booking Line** – Allows you to add additional nights following on from the previous nights booked
- **Replace Existing Booking Line** – Allows you to remove the current rate or room type and change them to a new selection and reduce nights
- **Rate Override Booking Lines** – To override the rate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

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

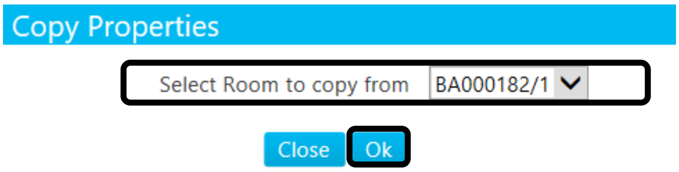
Copy Properties

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.

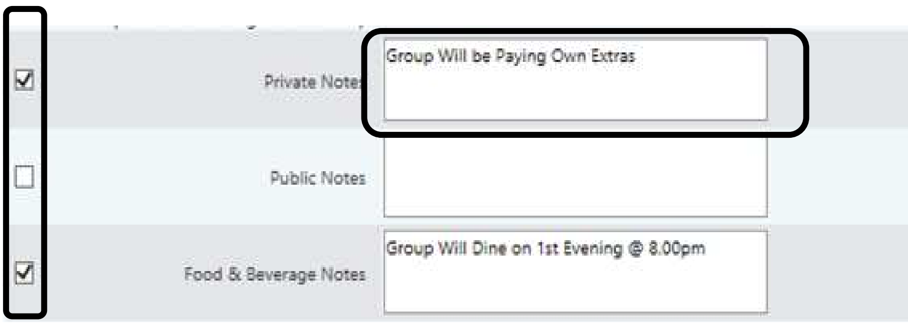
1. From the **Options** button, click on **Copy Properties.**



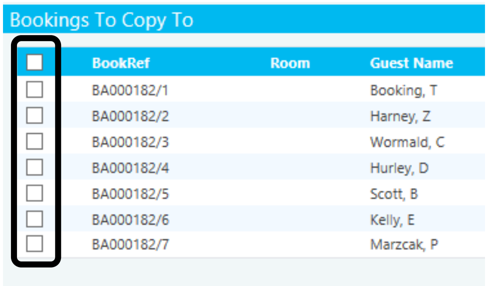
2. Select the room you wish to copy properties from, click **Ok**



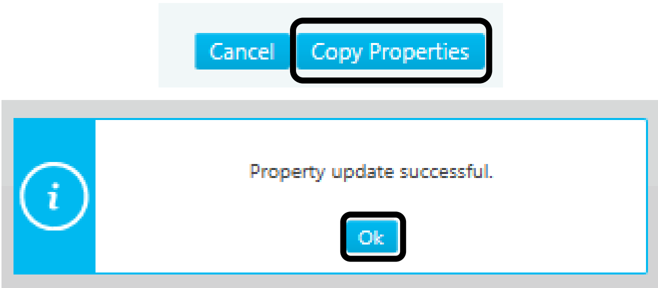
3. Select the section you wish to copy properties from. Tick the box on that section or add more notes and the box will auto tick



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

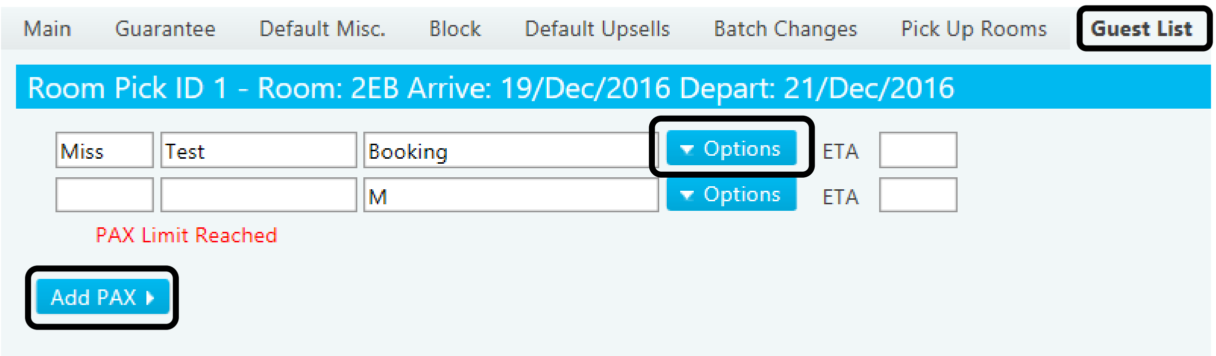


5. Click **Copy Properties,** a box will appear to state if it was successful or not, click **Ok.**



Guest List

1. 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:



2. Click the **Add Pax** button to add extra Adults/Children/Infants to the room.

3. Either free-type or Options & link each guest name, filling in an ETA if known.

Print Options

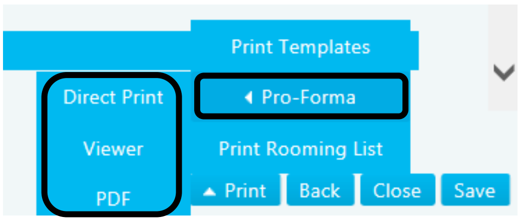
Print Rooming List

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

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

Pro Forma

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



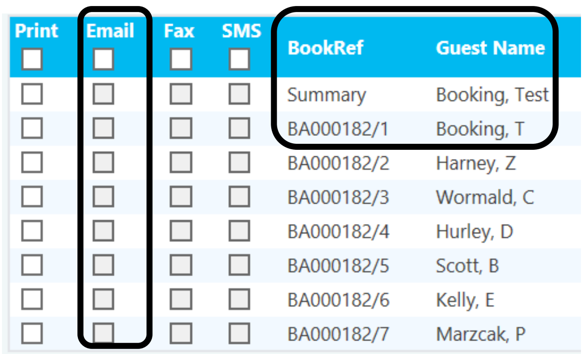
2. Choose **Direct Print**, Silverlight **Viewer** or **PDF** viewer.

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.

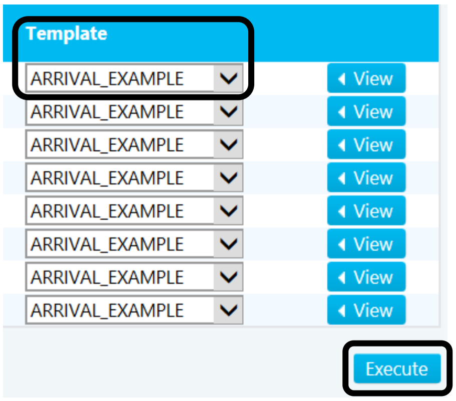
Print Templates

1. 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.



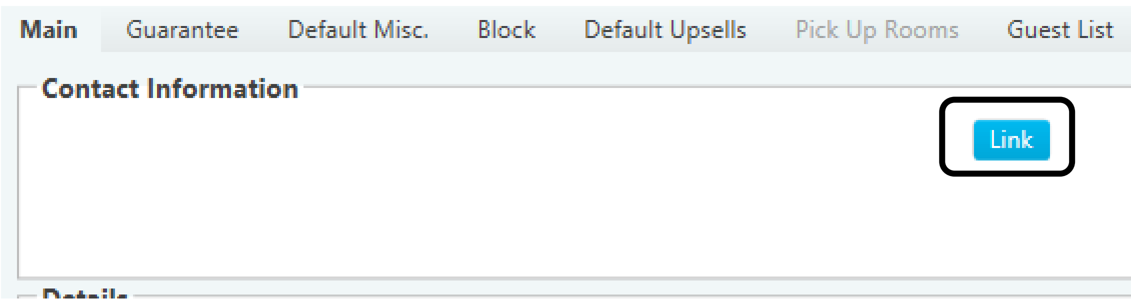
2. To email select the **Email** box for that particular booking. Select the **Template**, click **Execute**



Room Blocks

Creating a Room Block

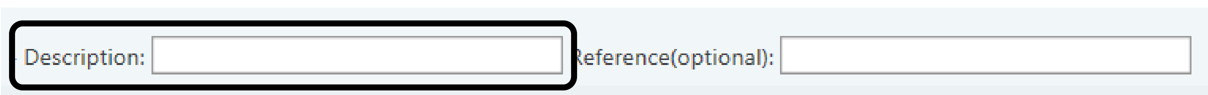
1. Click on the **Guest Journey** icon (bell).
2. From **Room Blocks** click on **Create**.
3. Click **Link** to link a profile as the main contact. You can either search for an existing profile, or add a new profile at this stage.



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

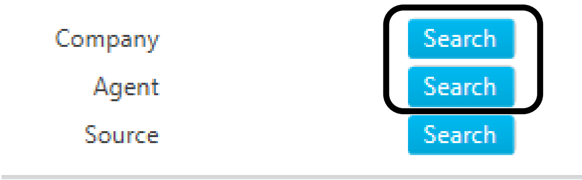
See People Profiles for guidance.

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

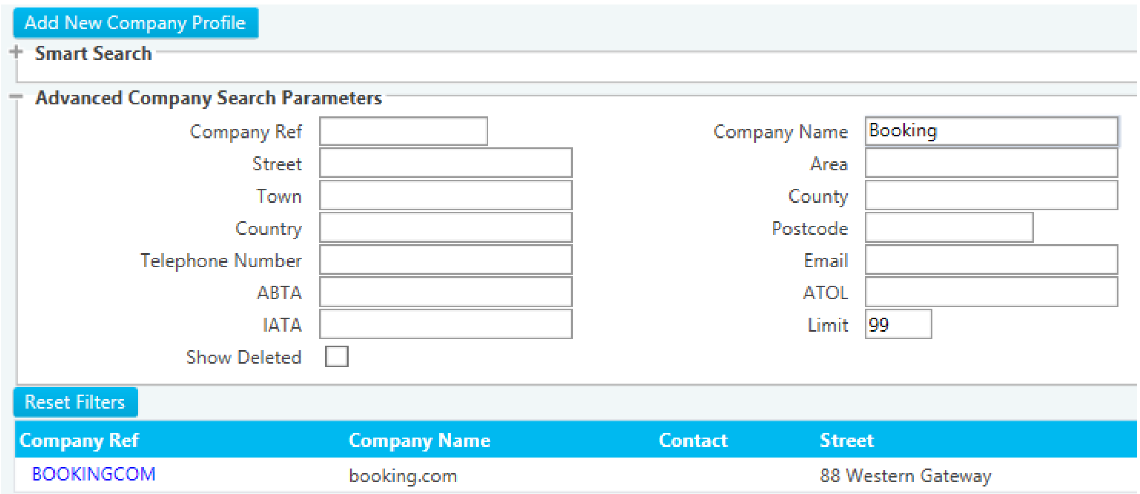


Linking a Company and/or Agent

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



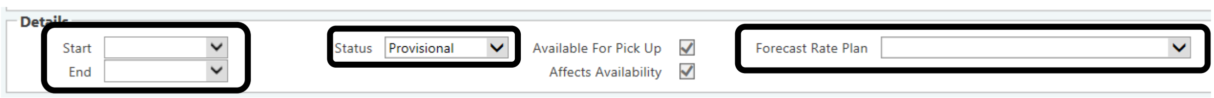
2. Search for the company using the parameters. If the profile exists click on the **Company Ref**, if it does not click **Add New Company Profile#**



Please see Company Profiles for more guidance.

Details Section

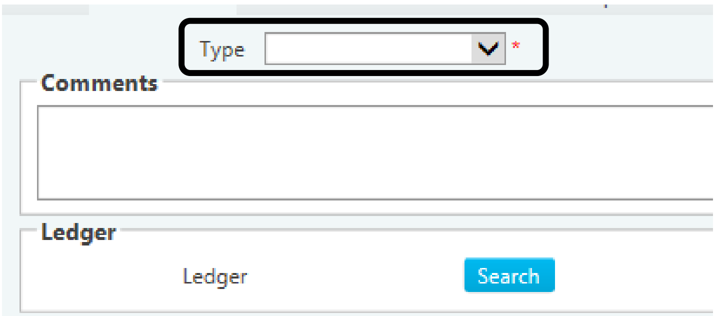
1. Enter the **Start & End** date of the block.
2. Change the **Status** of the block.
3. Select the **Forecasted Rate Plan.**



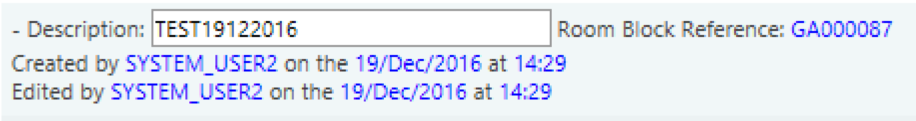
4. Complete the **Distribution Channels** field to select the relevant channels within distribution you wish to expose this block to.

Room Block Booking Tabs

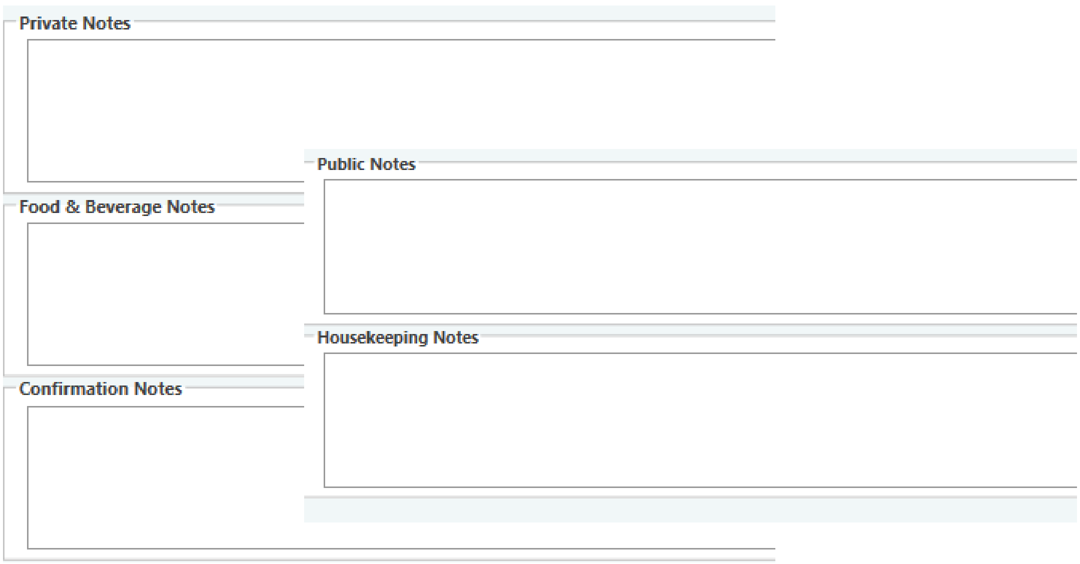
1. Click on the **Guarantee** tab and select your pay type information.



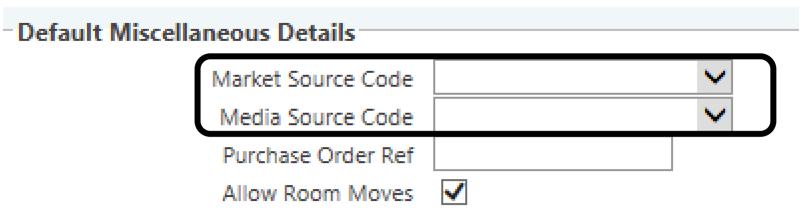
2. Click **Save** to generate the Room Block Booking Reference.



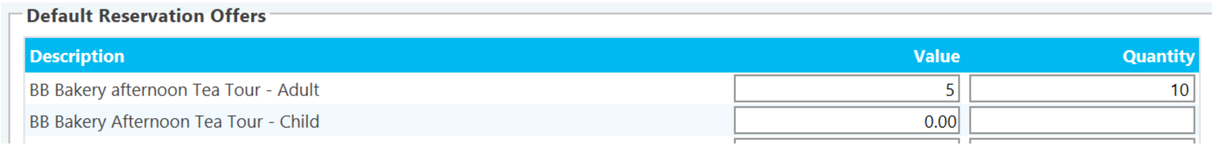
3. Click in the **Defaults** tab to enter notes to each room, any notes populated here will copy to bedroom bookings as they are picked up.



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



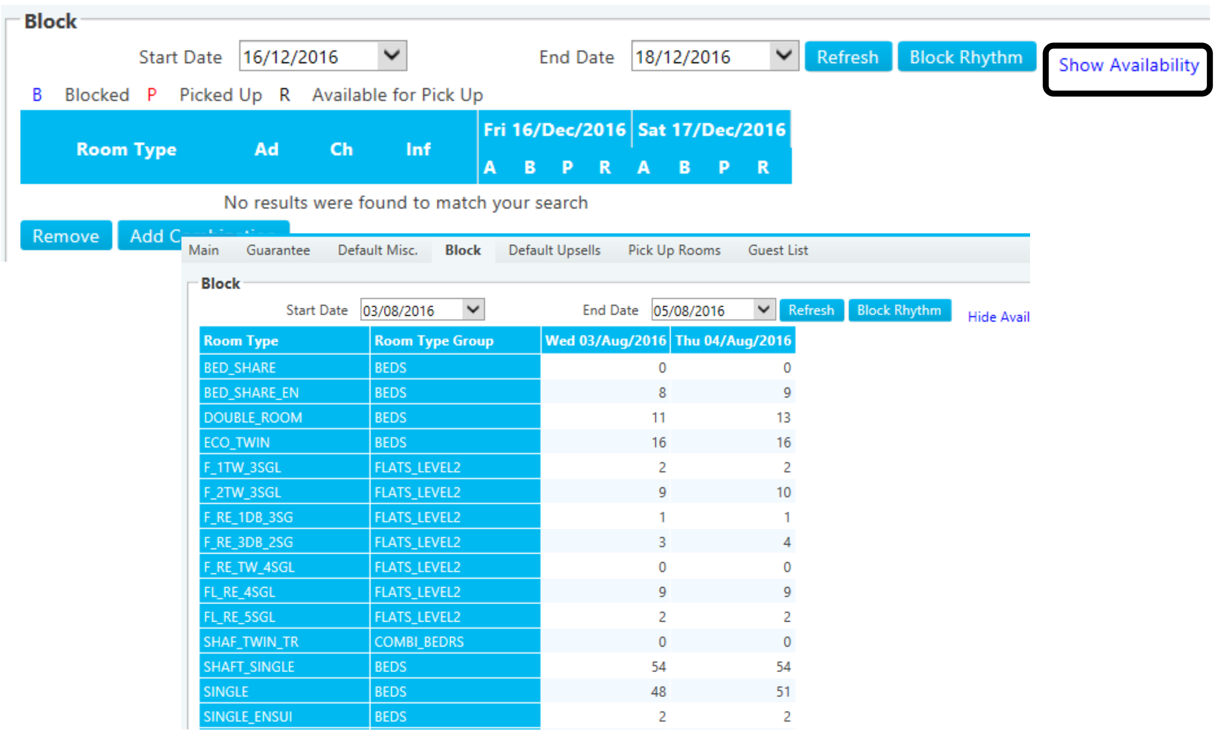
5. Select the **Upsells** tab this can be used at any stage prior to picking up your rooms to ensure that chosen products are posted onto the reservations as they are picked up.


Default Reservation Offers

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

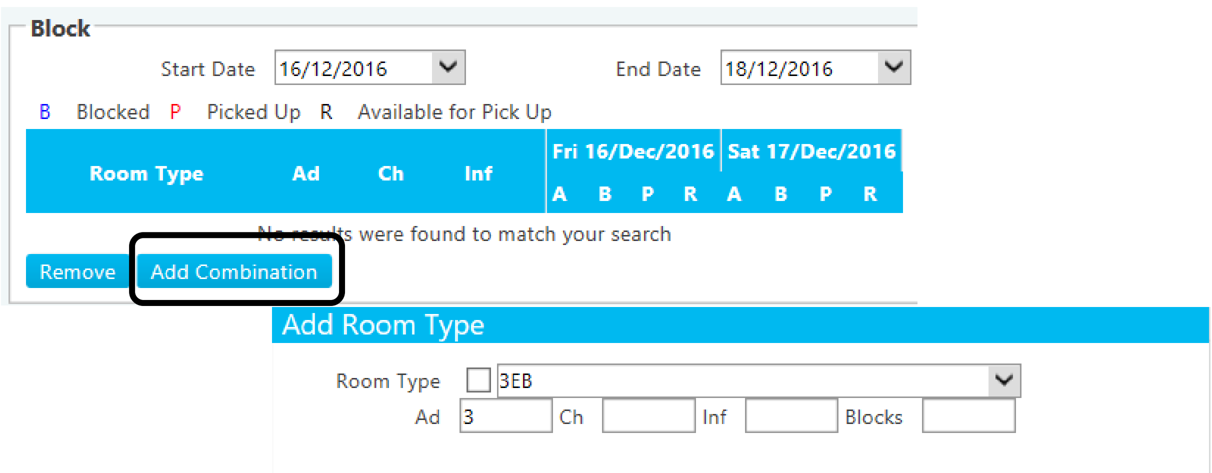
Add/Remove Rooms

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



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.



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

A = number of rooms of that type available

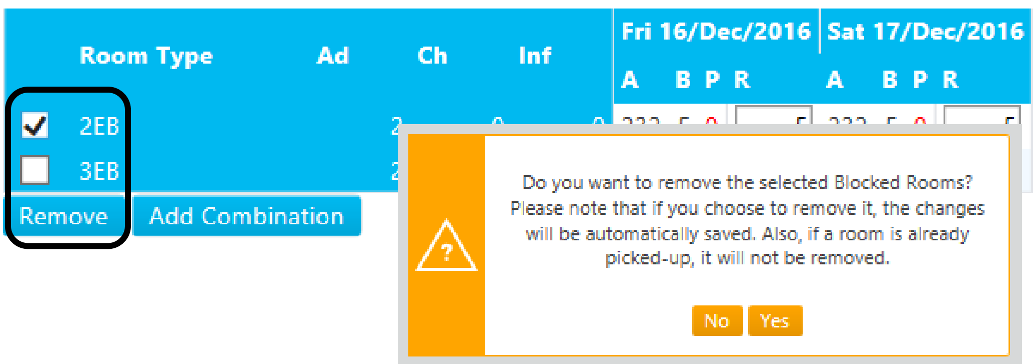
B = number of rooms blocked of that type (as above)

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.

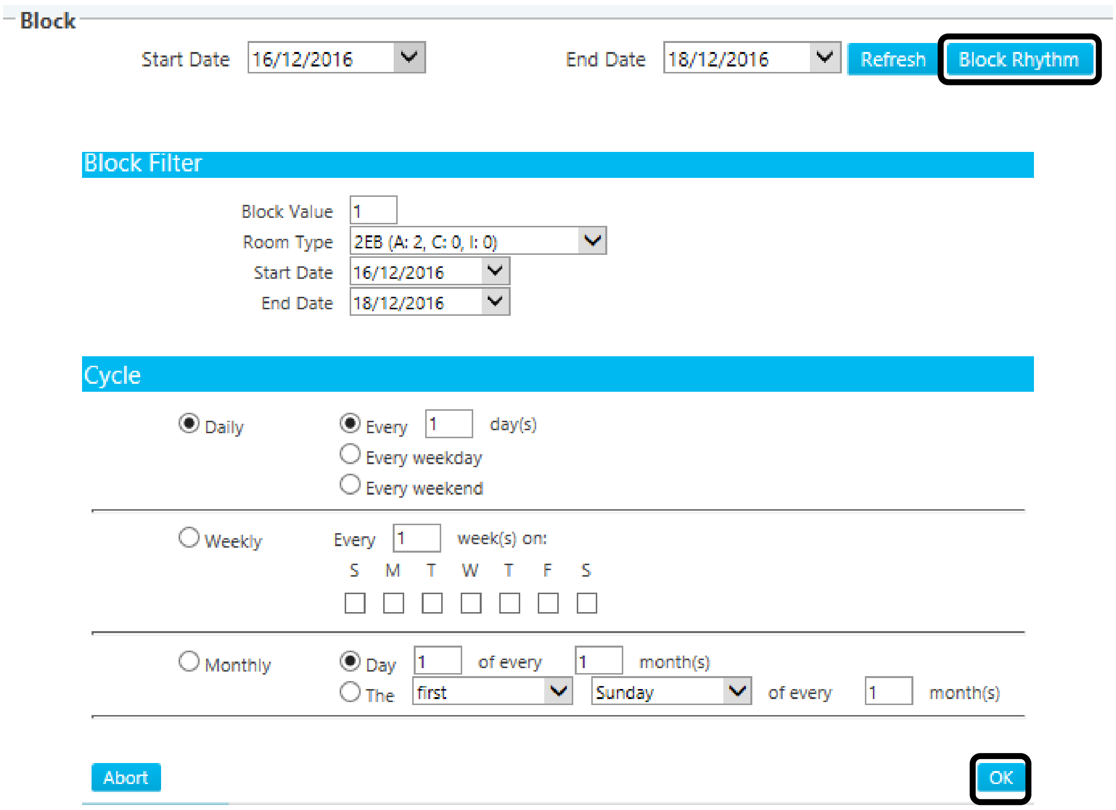
5. To remove one of your combinations, select the room type and click **Remove**. The following warning message appear. Click **Yes**.



Block Rhythm

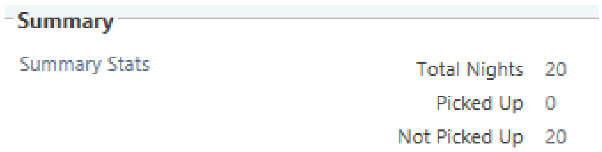
Allows you to add the number of rooms required per night in one step, rather than filling in each box individually.

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



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.

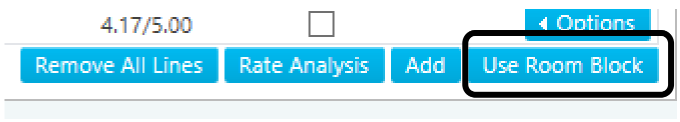
3. Click **OK**. Room summary will appear on the group main page.



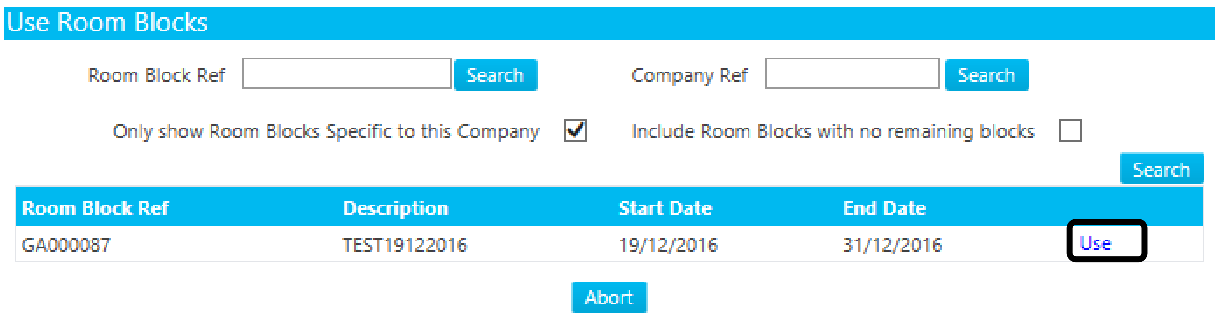
Pick Up Rooms

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.



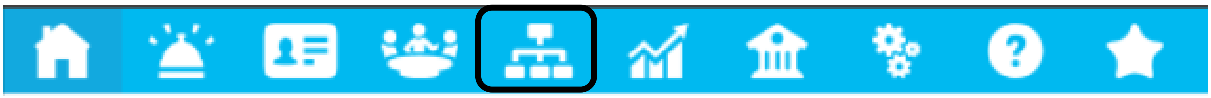
3. To attached click on **Use.**

4. Once attached the **View Room Block** and **Remove Room Block** button will appear.

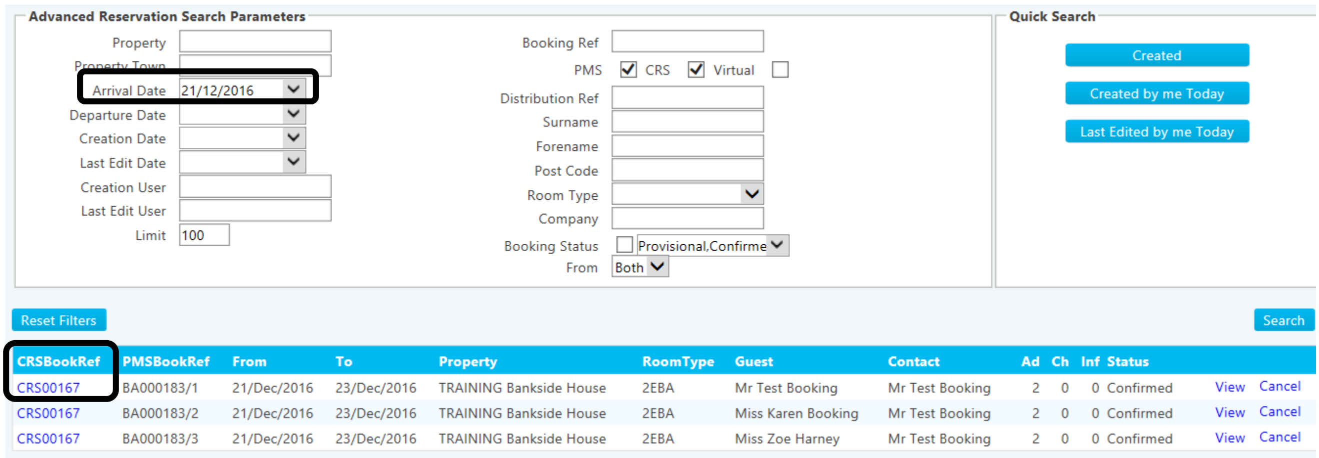
Room Move Changes

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

CRS Module – Search

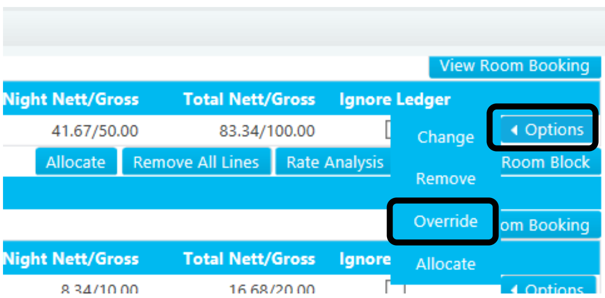


1. Click on the **CRS Module** icon (organisational chart).
2. From **Reservations** click **Search**.

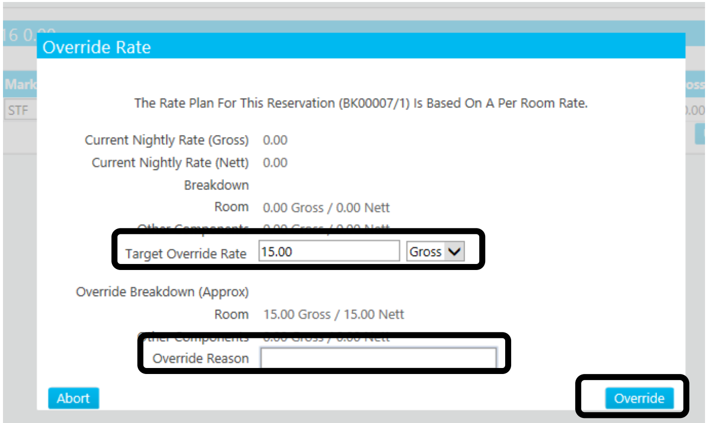


3. Click on the **CRSBookRef** to enter the booking.

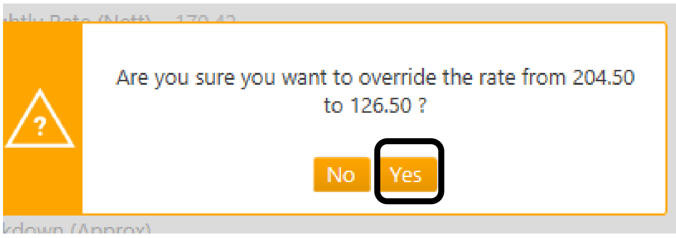
4. Under the **Rate Plan** tab, click on **Options**, **Override**



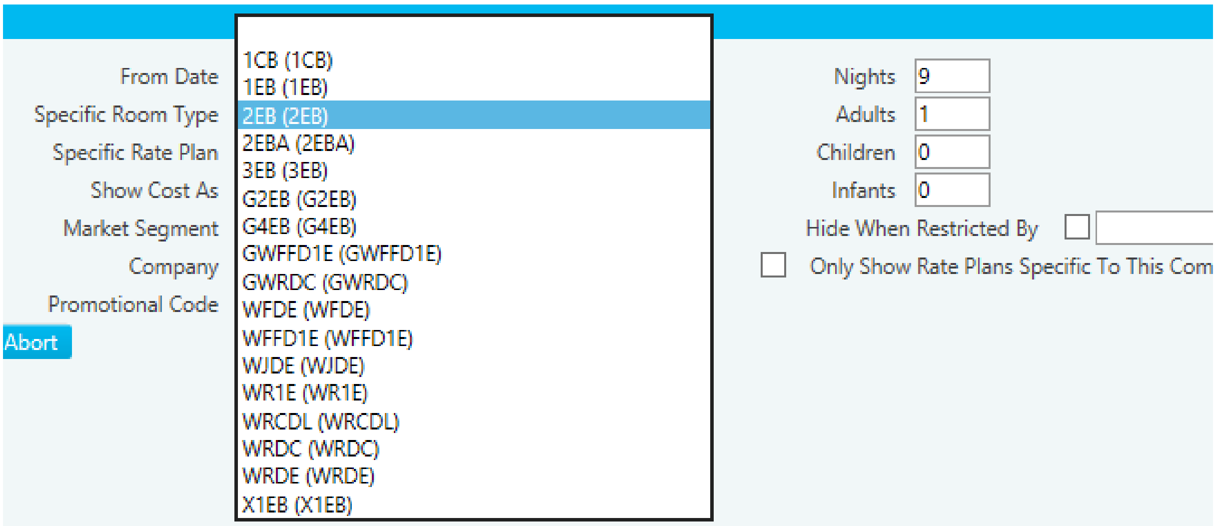
5. Enter the rate under **Target Override Rate** (per night) and enter the **Override Reason.**



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



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.

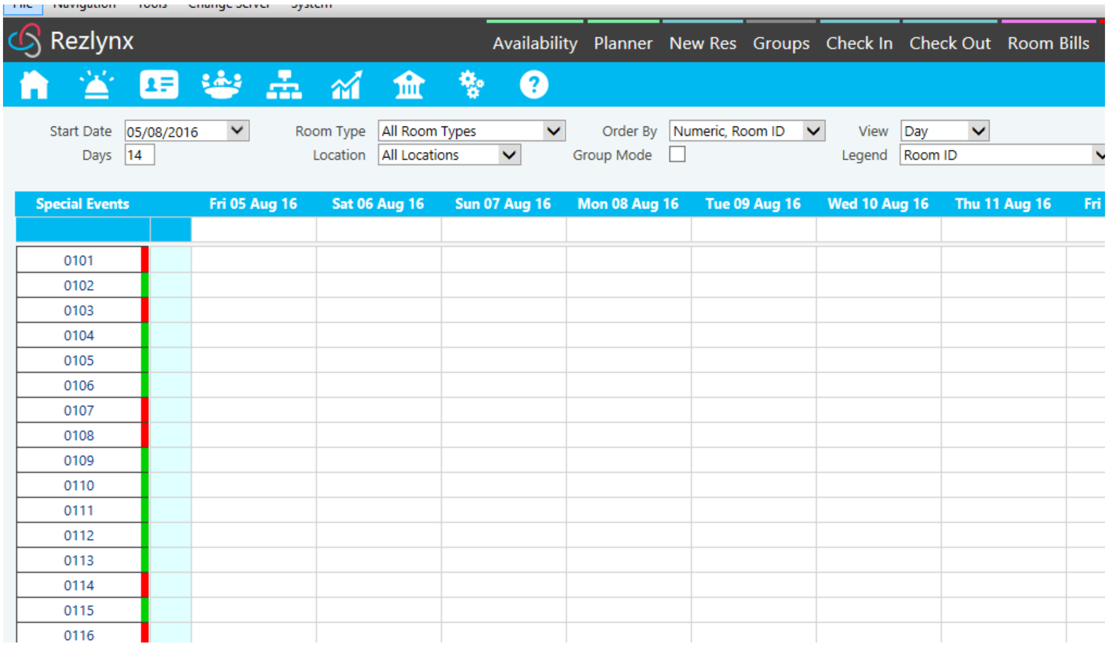


8. Select the new Rate Plan if applicable for the room type you wish to change it to, then click on the new choice.

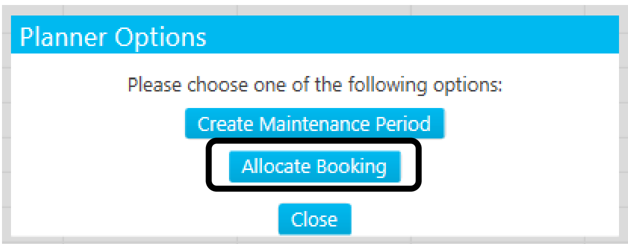
9. **Save.**

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.

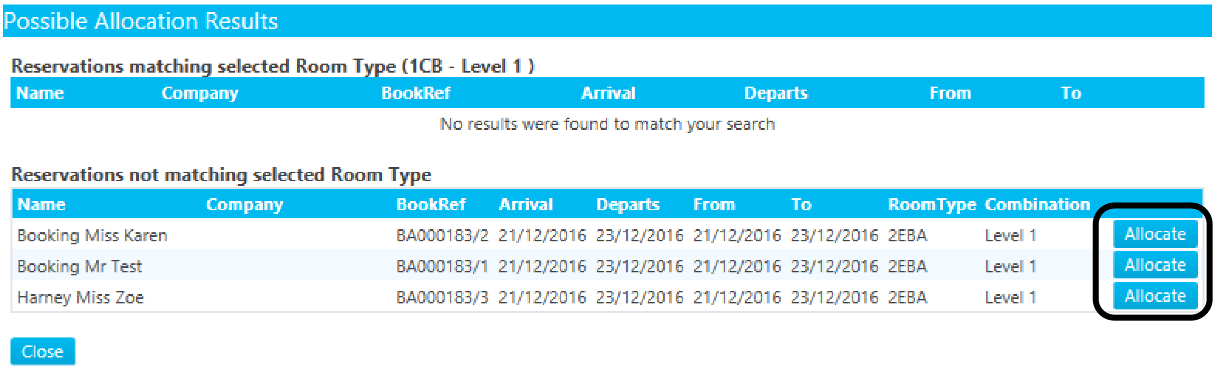


4. Click on a room number that is the type you wish to move your booking(s) to.



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

6. 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

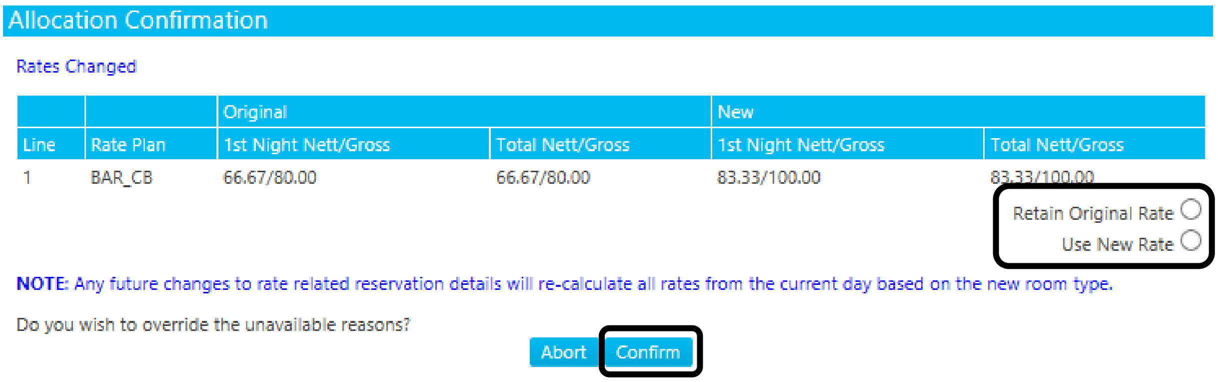
No results were found to match your search

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	Allocate
Booking Mr Test		BA000183/1	21/12/2016	23/12/2016	21/12/2016	23/12/2016	2EBA	Level 1	Allocate
Harney Miss Zoe		BA000183/3	21/12/2016	23/12/2016	21/12/2016	23/12/2016	2EBA	Level 1	Allocate

Close

7. 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

		Original		New	
Line	Rate Plan	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

Retain Original Rate

Use New Rate

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

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

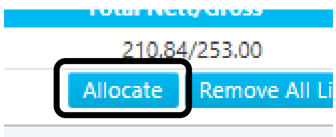
Allocating

CRS Level

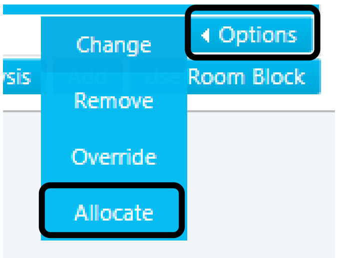
When creating a booking at CRS level the rooms booked can be allocated at this stage.

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

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



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



3. After clicking, the **Allocations Possibilities** pop up box will appear.

4. 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	

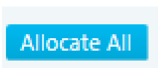
5. Once selected the room will appear in the Room ID section under the Rate Plan segment.

Room ID
0114

PMS Level

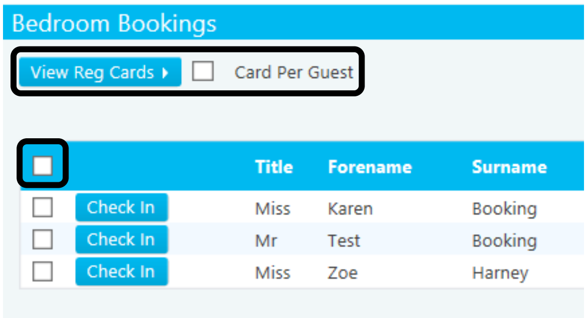
1. Click on the **Guest Journey** icon (bell).
2. From **Front Office** click on **Allocate/Un-allocate.**
3. There are 3 ways to allocate rooms from this screen:

- 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.**

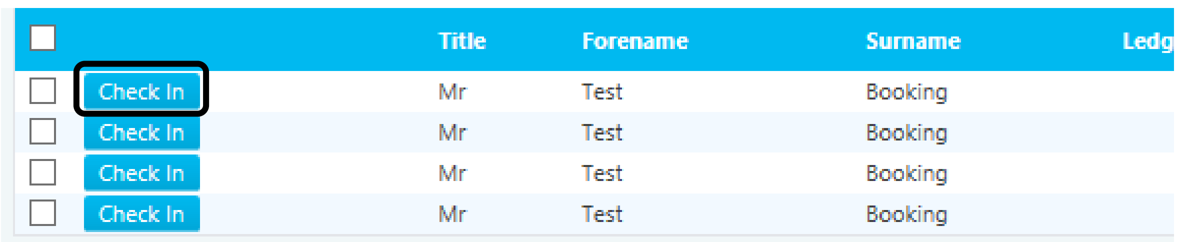


3. Tick the top box to select all bookings.
4. Click on **View Reg Cards.**
5. Select **Direct Prin**t to send to the printer.

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

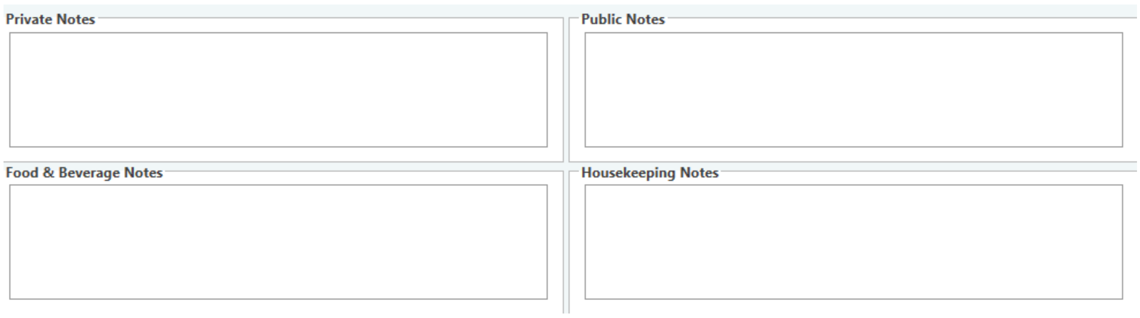
Check In

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.

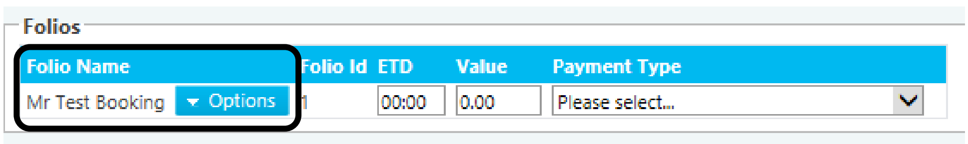


4. Check the summary to ensure that all the information is correct. i.e Amount of the stay/Deposit Paid & Remaining Balance.

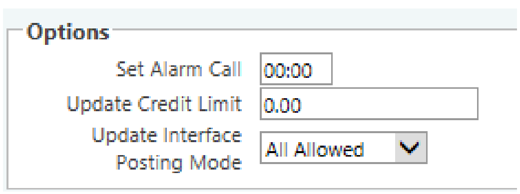
5. You can view notes added to the reservation and add any additional notes you wish to make.



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



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



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

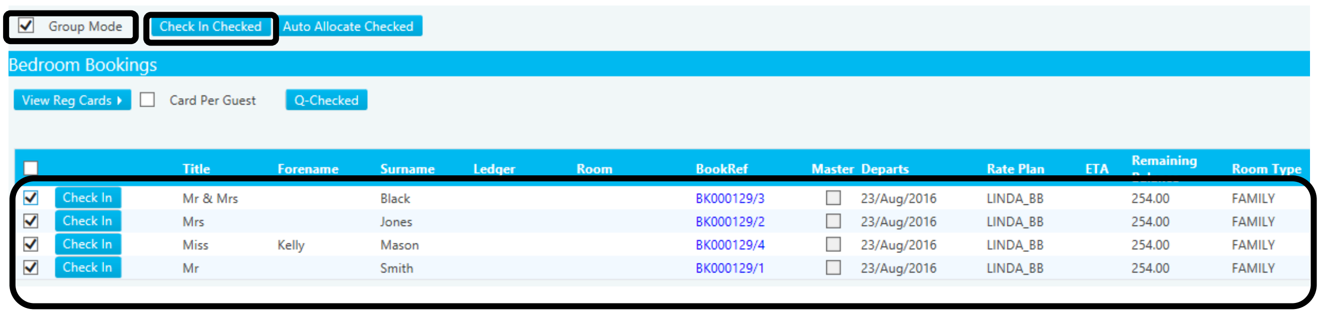
9. A message will appear confirming the Check In.

From this screen you can either:

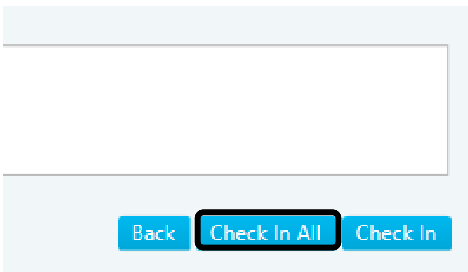
- Click **Back** to go to the Check In screen again.
- Click back into the actual **Reservation.**
- Click onto the room's **Room Billing** screen.

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

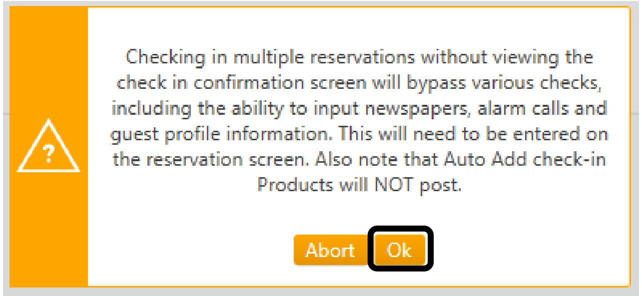
1. Click on group mode and click on one guest in a group/multi-room, alternatively you can just tick multiple guests.



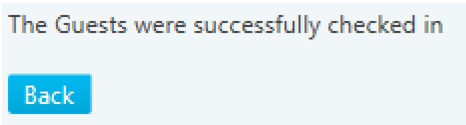
2. Please select **Check in Checked**, the system gives you the option to **Check in** each guest individually or **Check in All**



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.

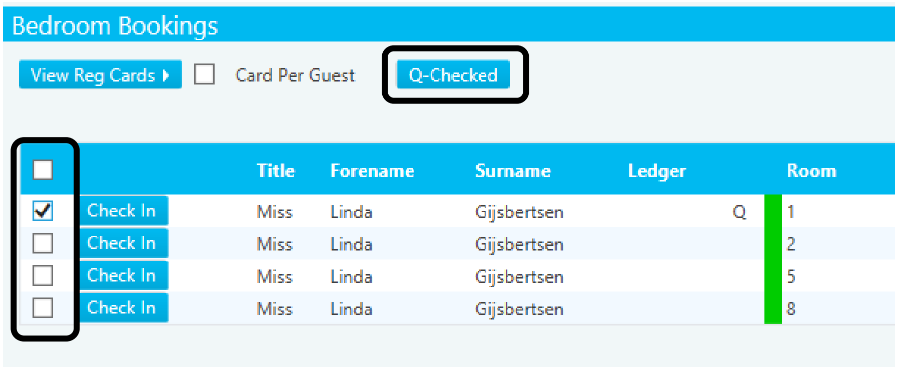


Q-Rooms

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

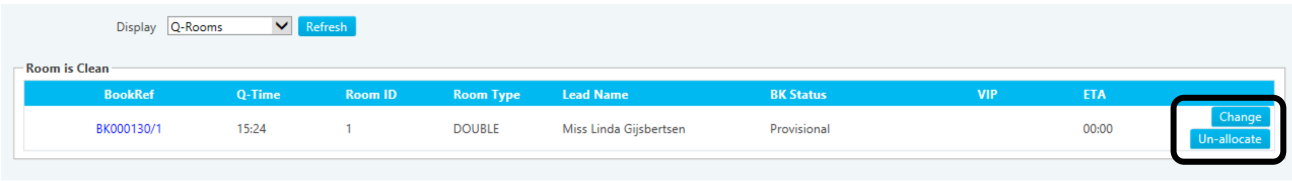
To place a room on the Q-Room report

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



To view your Q-Room Report

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



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.**

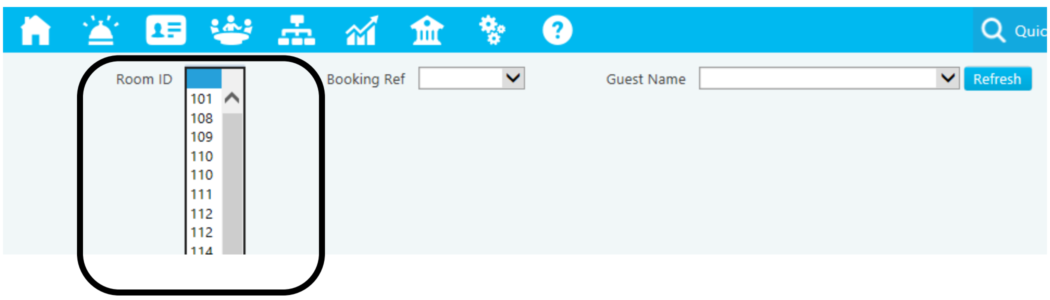
Room Billing

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	Con
☐	Print	Room Billing	116	Miss	Test	Booking	BA000182/1	
☐	Print	Check Out	117		Zoe	Harney	BA000182/2	
☐	Print	Check Out	124		Denis	Hurley	BA000182/4	
☐	Print	Check Out	138		Eliot	Kelly	BA000182/6	
☐	Print	Check Out	139		Phillip	Marzcak	BA000182/7	
☐	Print	Check Out	154		Bev	Scott	BA000182/5	
☐	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.

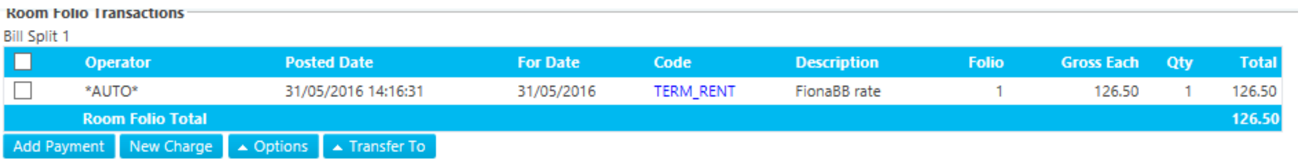
Print

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

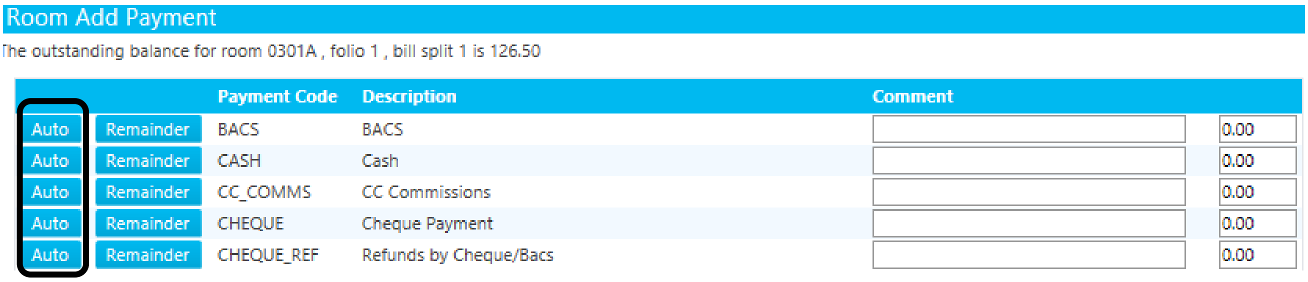
Check Out ** CIM incorporated**

Payment Required from Guest/Booker

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



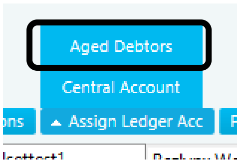
Select the relevant pay type that the guest/booker is wishing to pay by. Enter the amount or you can select **Auto** to auto fill in. Click the **Post** button at the bottom right of the box.



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

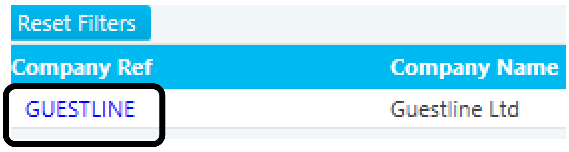
If the booking has not yet been assigned to a ledger account, click on the **Assign Ledger Acc** button at the bottom right

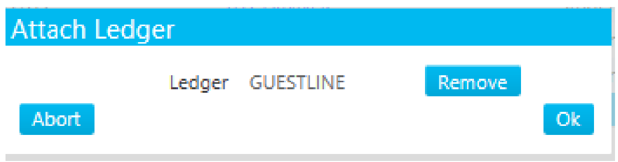
Click on **Aged Debtors** & **Search**.



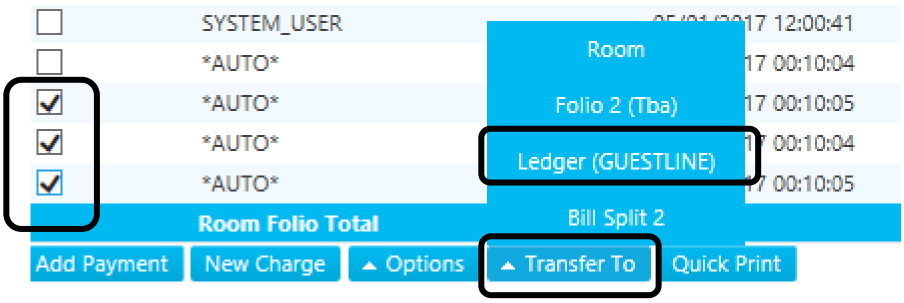
You can either then **search** for an existing profile, if the profile does not exist and you have the access and detail you can **Add New Company Profile** here.

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

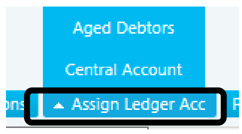




This will create a Ledger Folio within the room billing for that room. Select transactions, click transfer to and Aged Debtors.

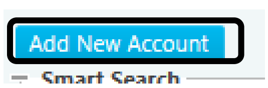


2. **Payment to the Student Account – CIM Level**

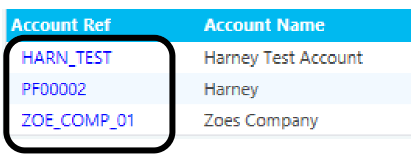


- Click on the **Assign to Ledger Acc** button.
- Click on **Central Account**. Click **Search**.

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

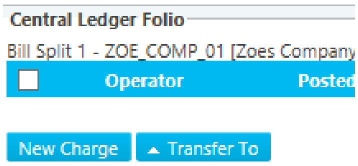


When you find the company you wish to attach for the ledger account click on the Account Ref number



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

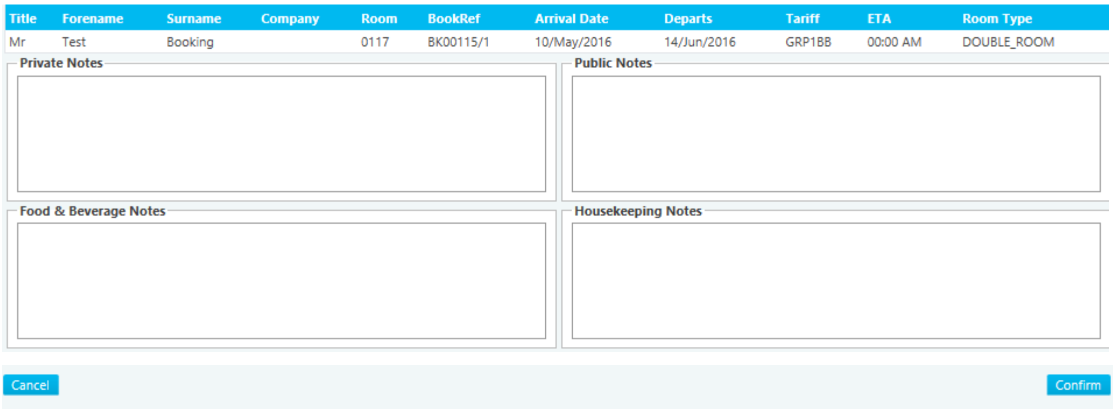
This will create a Central Ledger Folio within the room billing for that room. Transfer any charges from the bill to the Ledger if applicable



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

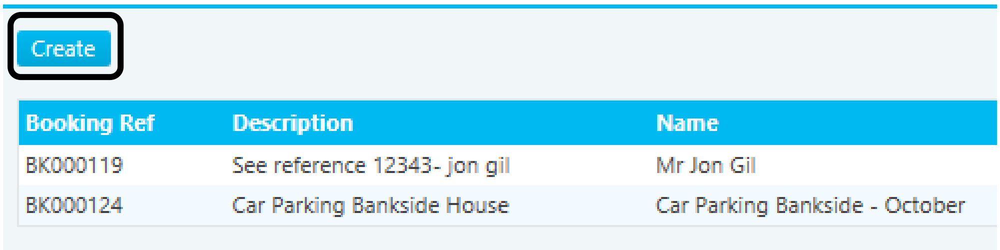


You will be asked to confirm, once confirmed you will not be able to make any amendments or changes to the folio. Prior to confirming the check-out, you can update any notes, they will not update the profile but will remain within the reservation for future reference.

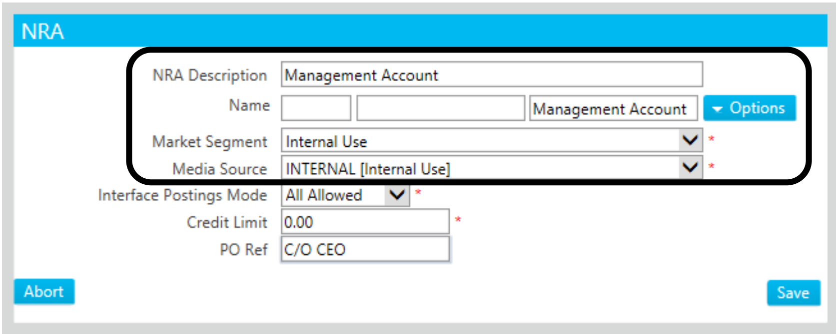
NRAs

NRA stands for 'Non Residential Account'
These are often referred to as dummy room or management account.

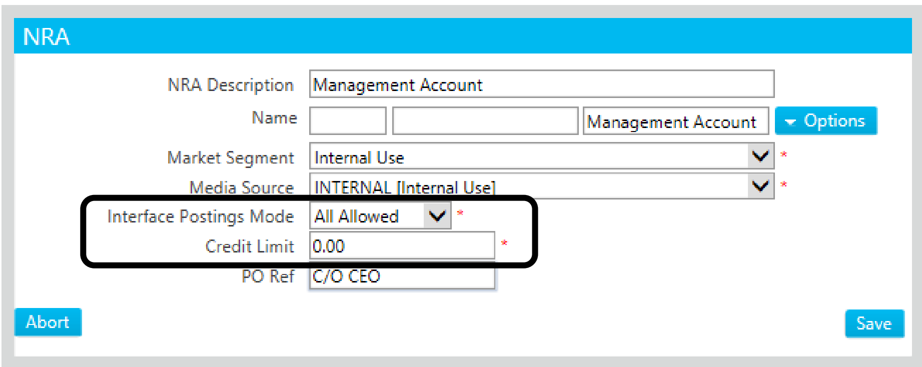
1. Click on the **Guest Journey** icon (bell).
2. From **Billing** click on **NRAs.**
3. Click on **Create** to begin.



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



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



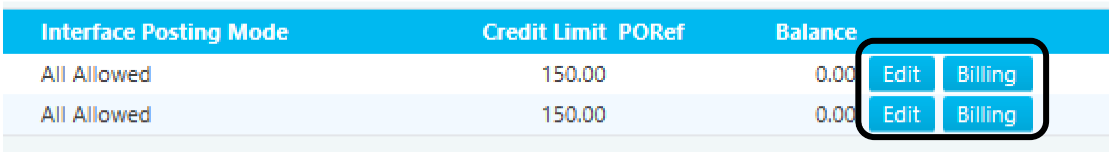
10. Click **Save** to create the NRA.

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.**



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

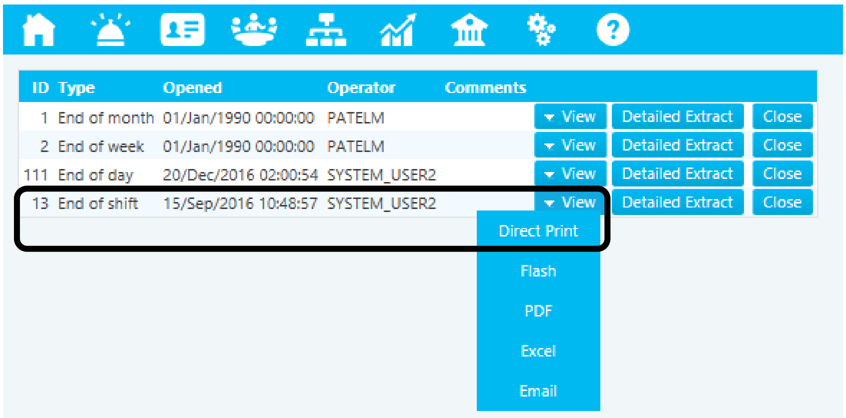
OTA - Online Travel Agent

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.**



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
SUNDRIES	**Total**		**0.00**	**0.00**	**0.00**
Totals			**1332.62**	**266.58**	**1599.20**

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

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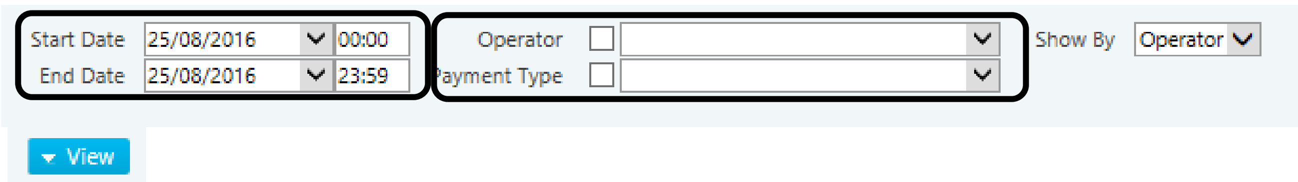
6. Match your Cash, BACS, Cheque payments first.

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.

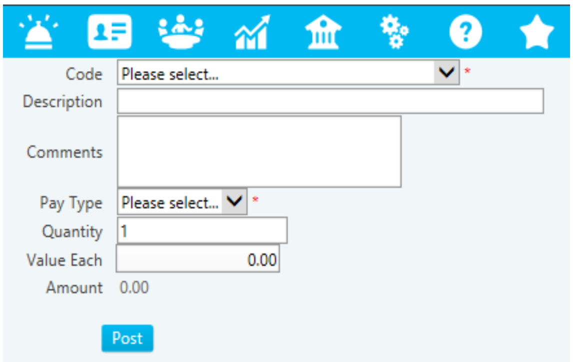
9. Select the **Start/End Date & Time period.**



10. Select the **Operator.**
11. Select the **Payment Type.**
12. Click on **Refresh.**
13. Cross match all payments to locate the imbalance.

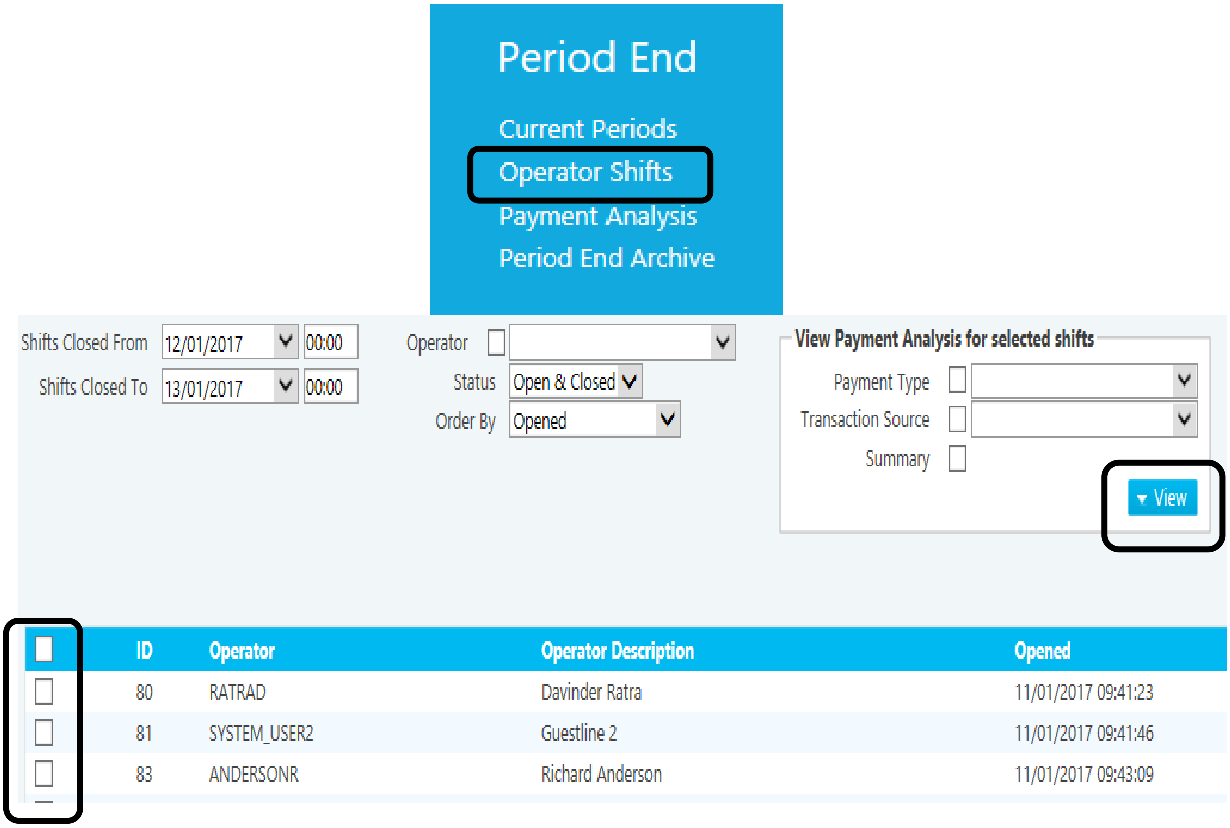
If there is an imbalance e.g. £100.00 more on Visa card, and £100.00 less on MasterCard you need to correct this within the system.

1. Go to the **Guest Journey** icon (bell).
2. From **Billing**, click on **Post Cash.**

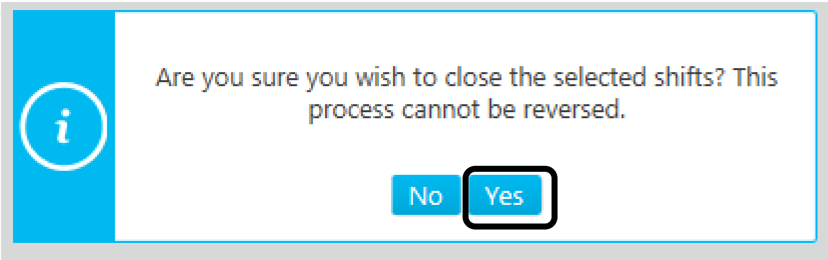


3. Select the code as accommodation.
4. Enter a description similar to what is opposite.
5. Select the Payment type of which you shall be refunding.
6. Enter the value as a minus figure.
7. Remember to click on View to direct print this so you can attach it to with your banking.

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.



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



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

Front of House

- Guest List
- Room Move
- Meal Plan

Notes

Reservation

- Cancellations
- Daily New Reservations
- No Shows

Notes

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Revenue

- Actual & Forecast
- Rate Override
- Revenue By

Notes

Forecast

- Revenue by Market Segment
- Future Reservations

Notes

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Sales & Marketing

- Booking Source
- Design Query

Notes

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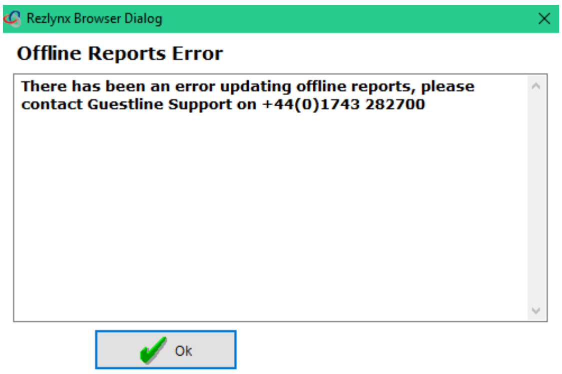
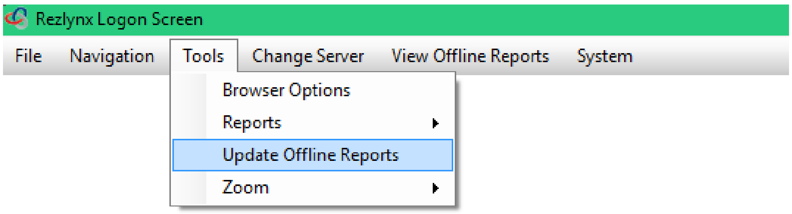
Offline Reports

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 your 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.

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
ROOS		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

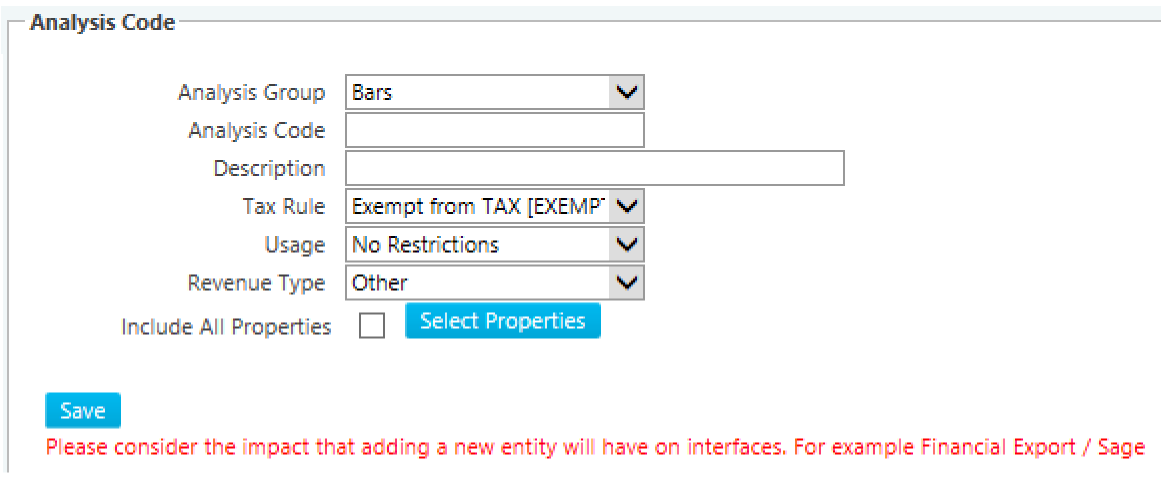
1. Click on the **CRS Module** icon (organisational chart).
2. From **Configuration**, click **Analysis Codes.**

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**.

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



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

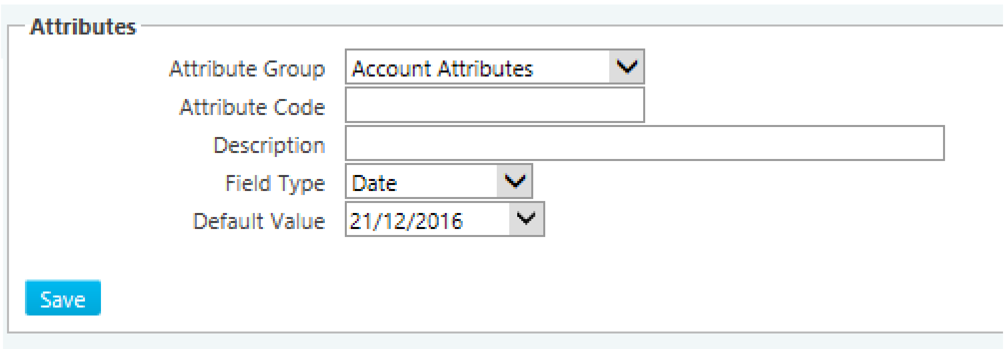
9. Click **Save.**

Attributes

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

4. Select the **Attribute Group.**

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

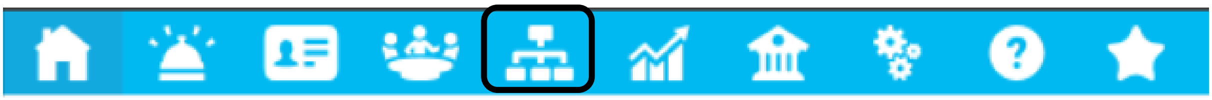


6. Select the **Field Type** i.e. Yes/No, Small Text Box.

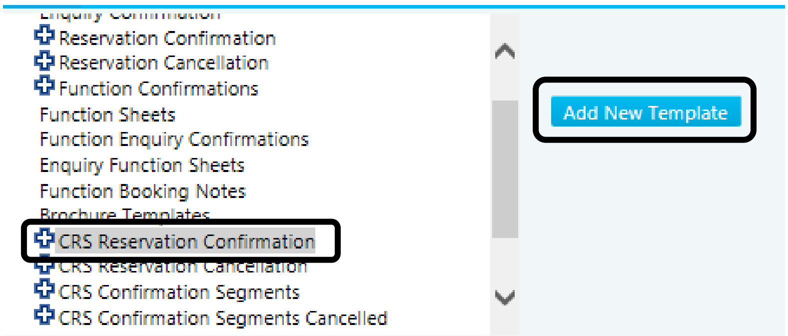
7. Click **Save.**

Templates

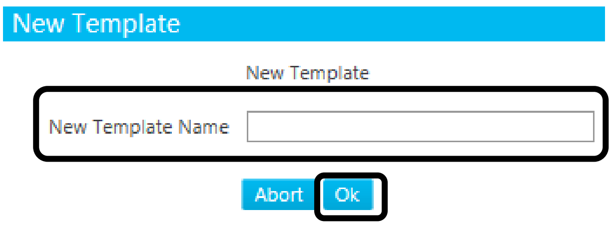
Creating a Template



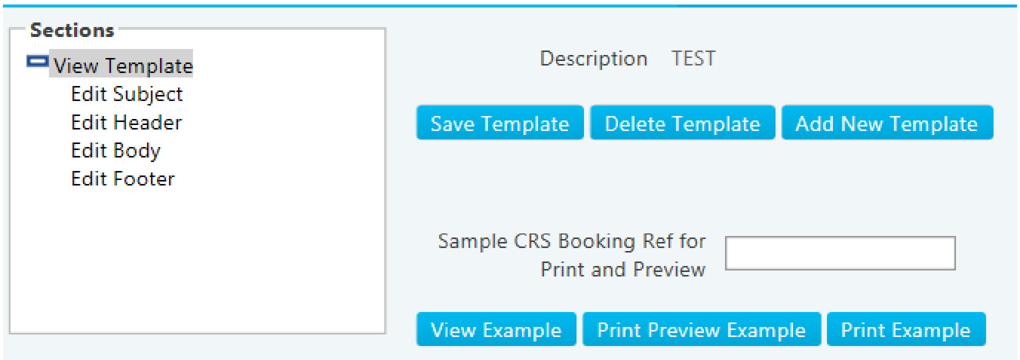
1. Click on the **CRS Module** icon (organisational chart).
2. From **Configuration**, click **Template Editor.**
3. Select the section to create your template under.
4. Click **Add New Template.**



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



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

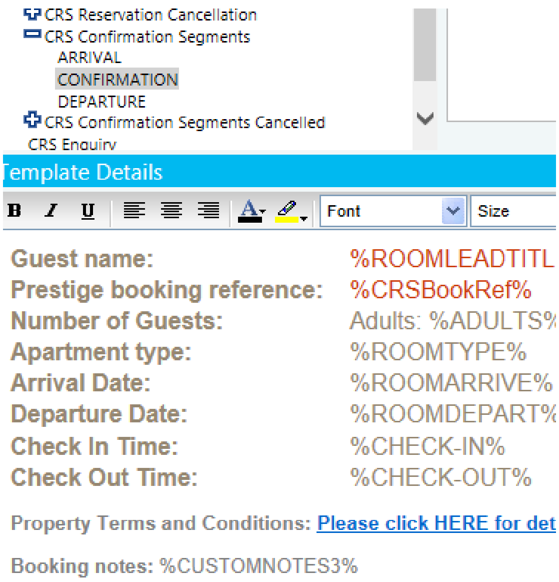
The body field is where the body of your template needs to be written up. There are more tags in this section as it will be the main part of your template.

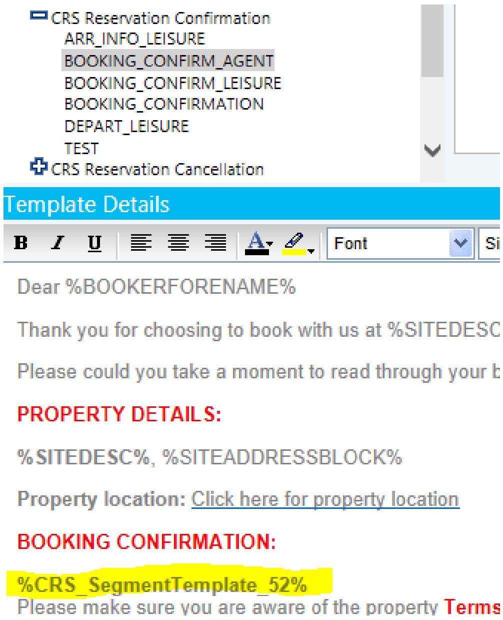
Footer Field

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.





Automated Templates

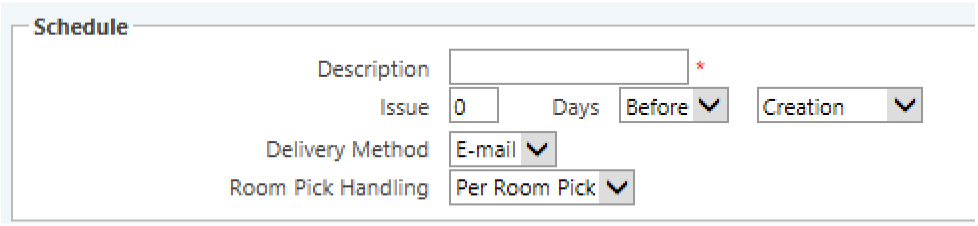
1. Click on the **System** icon (cogs).
2. From **Tools**, click **Template Automation.**
3. Click **New Schedule button.**

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

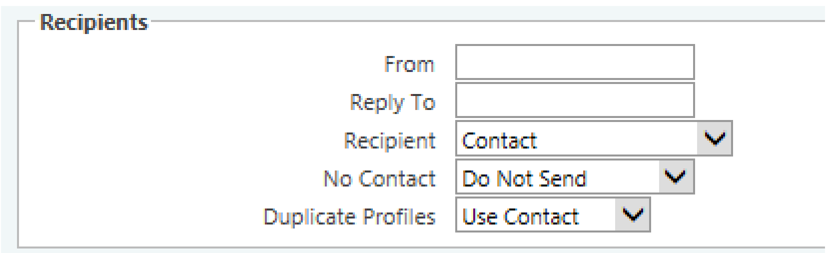
Schedule



The **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

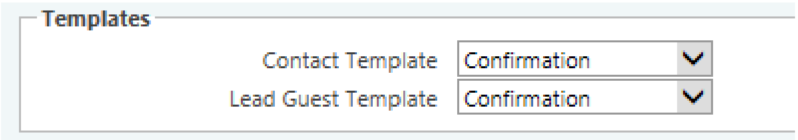


The **Recipients** section contains the following fields:

- 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

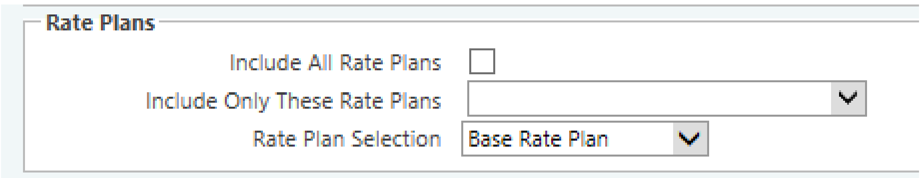
Templates



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

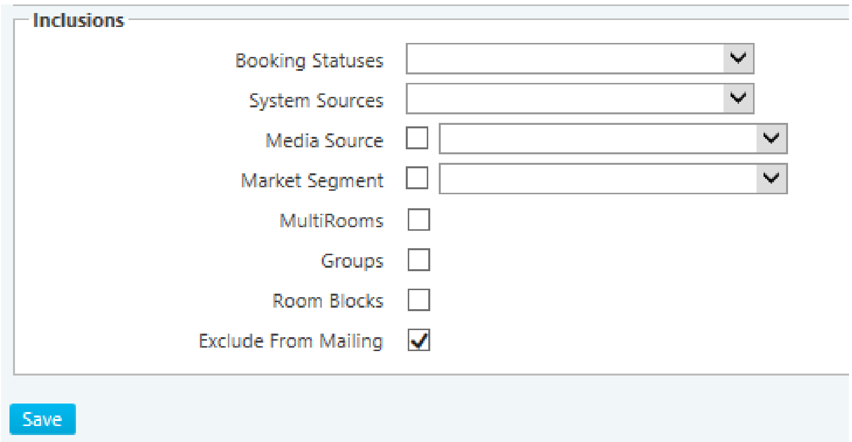
Rate Plans



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

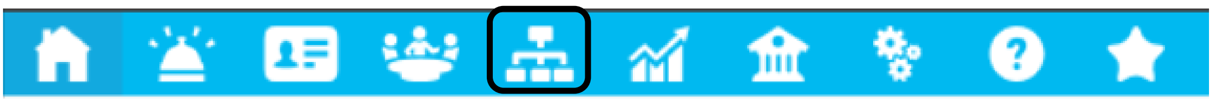


The **Inclusions** section contains the following fields:

- 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.

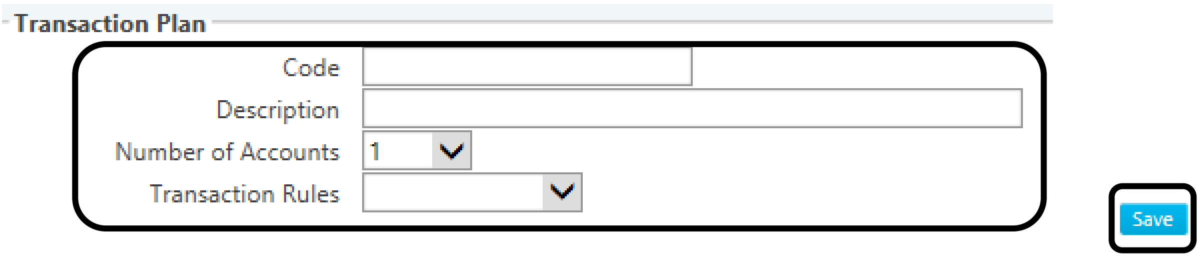
Creating Transaction Plans



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**.

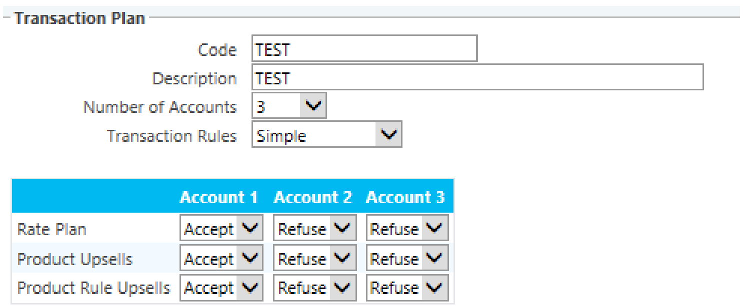


7. Click **Save.**

Transaction Rules

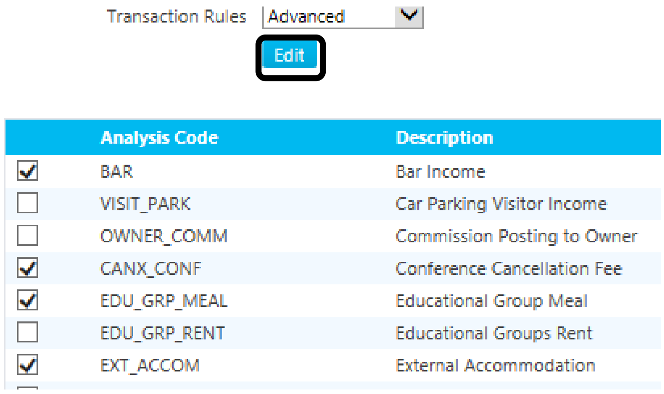
Simple

Allows you to simple select **Accept** or **Refuse** per each different account across the 3 charge modes.

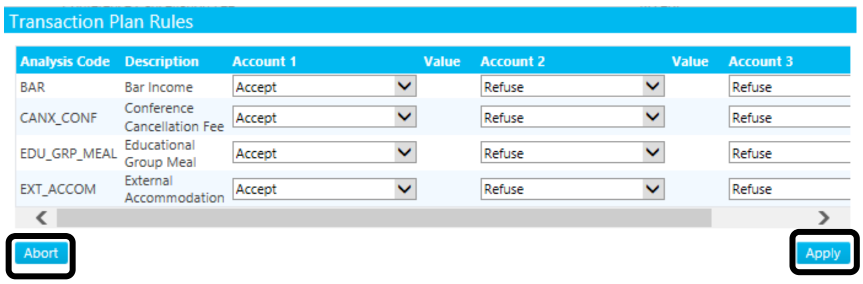


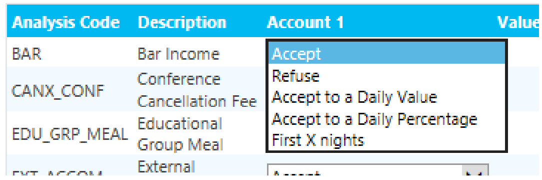
Advanced

Allows you to select from all the analysis codes. Once you have selected your choice tick the boxes relevant and click **Edit**.



This allows you to choose what each account will allow and select a certain amount or percentage to allow charging by also.



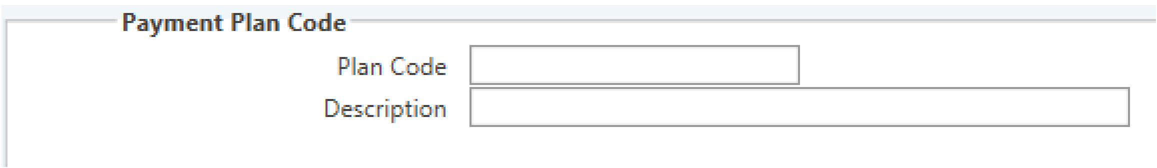


Once you are happy click on **Apply** and **Save** to save the Transaction Plan. Repeat until all of your Transaction plans have been created.

Creating Payment Plans

1. Click on the **CRS Module** icon (organisational chart).
2. From **Configuration**, click **Payment Plans.**
3. Click on **New Payment Plan.**

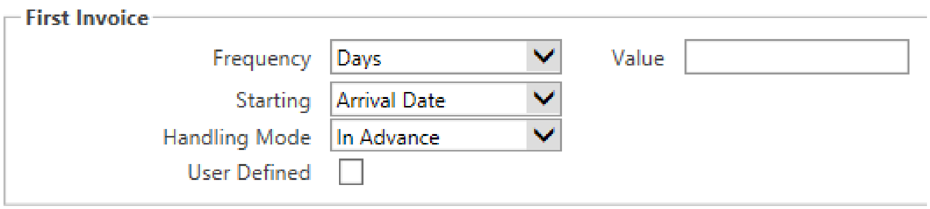
4. Enter a **Plan Code** and give the code a **Description.**

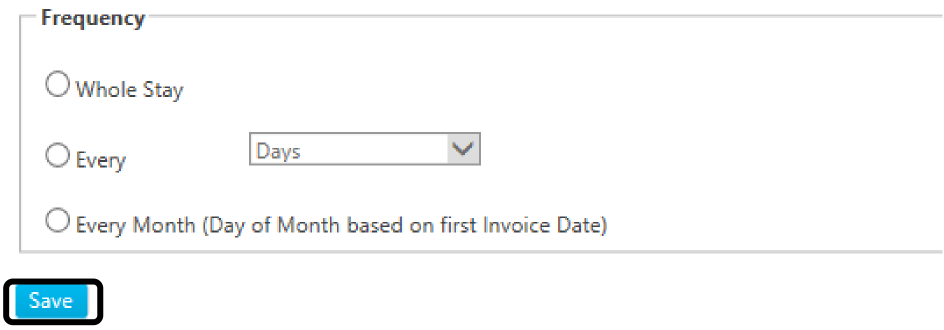


5. Complete **First Invoice** and the **Frequency** field.

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





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

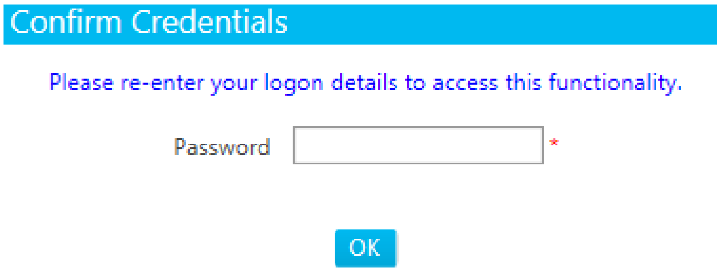
6. Click **Save.**

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.

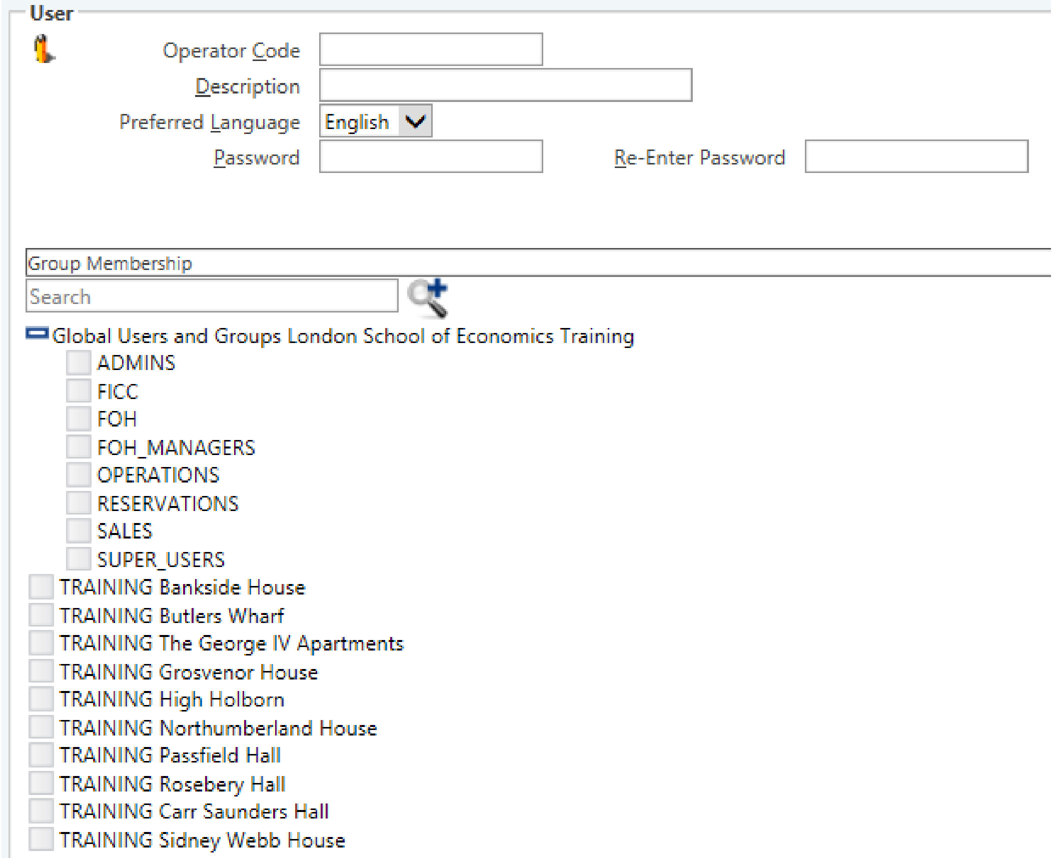


4. Click to create a **New Global Group** if required

   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.**

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