

Front Desk Training

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Front Desk Training Guide

Contents

GOALS

By the end of this session, you will:

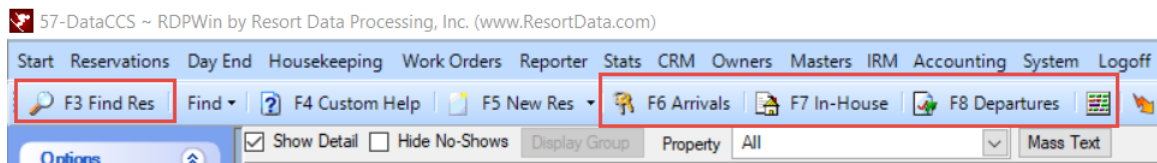
- Know the basics of how to work with a reservation
- Know the basic day-to-day steps for managing reservation details
- Know how to locate, preview, and print reports

CHANGES TO RESERVATIONS

Locate the reservation

There are three options for locating a reservation:

- F-keys / Function keys

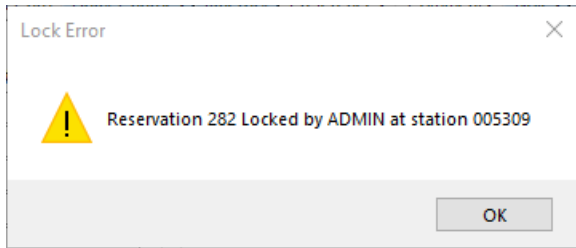


- Find Res F3
- Tape Chart F9

Open the reservation for changes

Modifying a reservation requires opening the reservation.

- While the reservation is opened, the reservation is locked by that user
- Other users are able to view a locked reservation but they are not able to modify the reservation while it is locked
- A dialogue box will inform them when a record is locked



- To modify a reservation:
 - Double-click the reservation
 - This opens the "All Detail" pane
 - Single-click to select, go to the Options panel, select Change Options, select All Detail
 - Use the shortcut Ctrl+Shift+C

The "All Detail" pane is displayed below:

The screenshot shows the "Change Reservation" window. The left pane contains reservation details: Res# 161, Rate Plan GRP1, Type 1BL, Room 320, Property Tower 2, Arrival Sun 02/22/15, Nights 2, Departure Tue 02/24/15. The right pane shows a financial summary table.

Charge Summary		Daily Charges	Preferences	Comments	Notes
Control Rate Plan		Rate Plan	GRP1		
		Avg. Rate	80.00		
Total Rate Override		Total Rate	160.00		
		Other Charges	0.00		
Tax	TA - 7% Tax Rate		11.20		
		Security Deposit	0.00		
Folio Filter	All	Total Charge	171.20		
		Payment	171.20		
		Balance Due	0.00		
Next Pay Code Change					
Transfer to Group	TAUCK	IP	0.00		
Transfer to Leader	146	RB	0.00		
		Folio A Balance	0.00		
		Folio B Balance	0.00		
		Folio I Balance	0.00		
		Credit Limit	0.00		
		Refund Amount	0.00		

- Some of the labels on the left side of the screen can be customized
- Drop-downs fields like Source of Business, Market Code, Housekeeping Services, Guaranteed, VIP and Comments are customizable
 - Values can be added or disabled

The screenshot shows a reservation form with the following fields and options:

- Source of Bus.: 01 - Returning Guest
- Market Code: 01 - F.I.T. Transient
- Hskpg Service: Select
- Guar: Guaranteed (dropdown menu is open showing options: Select, 4 PM Hold, 8 PM Hold, Manager Ok'd, Not Guaranteed, Guaranteed)
- VIP: (empty)
- Allow Move:
- Buttons: View Folio, View Itinerary, Add Activities

- A pair of heads is the browse function
 - Provides ability to associate reservation with a different guest master/guest tile, CRM tile, group master or group leader

The screenshot shows a reservation form with a pair of heads icon next to the Guest# and CRM# fields, and a financial summary table.

Guest# 3 CRM# 00001002

Name: Hamm/Mia
Address 1: 4 Soccer Lane
Address 2:
Zip Code: 32103 City: Chapel Hill
State: NC - North Carolina
Country:
Home Phone: 312-456-8526
Business Phone:
Guest Email: terri_Caste@resortdata.com
Confirm To: Confirmation

Tax	TA - 7% Tax Rate	30.88
Calc	Security Deposit	250.00
Folio Filter: All	Total Charge	924.42
	Payment	325.00
	Balance Due	599.42

Next Pay Code Change:
Transfer to Group: 0.00
Transfer to Leader: 0.00
Erin A. Balvino

- Blue links are clickable
 - They may provide additional information such as rate plan requirements, access to credit card details, package plan break out or applying additional charges such as cleaning or resort fees

Change Reservation

P6: Preassign - Checked In

Res# 357 Adlt 1 Teen 0 Child 0 Pets 0

Rate Plan RACK V Type 1B Rate 100.00 Room 412 OK Property Tower 1

Arrival Sun 03/01/15 Nights 1

Change Rate Related Fields

Dates & People Room Type Room#

Share Res# Guest# 1

Name Birch/Kenny

Address 1 131 Jefferson Drive

Address 2

Zip Code 12345 City

State IA - Iowa

Country

Home Phone 319-269-2625

Business Phone Carrier

Guest Email Enter an email

Confirm To

Credit Card VISA Number of Cards: 2

Card Number *****0000

Auth. Code

Source of Bus. 01 - Returning Guest

Market Code PN - Regular Guest

Hskpg Service 1 - Checkout Only

VIP Celebrity

Miscellaneous Changes Statistics Texts Pay Schedule

Housekeeping Pay Codes Tasks Work Orders Agents Room Owner

Charge Summary Daily Charges Preferences Comments Notes

Control Rate Plan Rate Plan RACK

Avg. Rate 100.00

Total Rate 100.00

Other Charges 70.00

Tax TA - 7% Tax Rate 7.00

Calc Security Deposit 0.00

All Total Charge 177.00

Payment 77.00

Balance Due 100.00

Next Pay Code Change

Group 0.00

Order 0.00

Folio A Balance IP 0.00

Folio B Balance IP 0.00

Folio I Balance 100.00

Credit Limit 500.00

Refund Amount 0.00

View Folio View Itinerary Add Activities Save & Close Save Close Help

Credit Card VISA Number of Cards: 2

Card Number *****0000 Exp. Date 12/23 Change

Credit Cards

Type	Number	Exp Date	Card Holder Name	Zip Code	CID #	Swiped	Auth Amt
VISA	*****0000	12/23	Kenny Birch			<input type="checkbox"/>	
MC	*****5454	10/21	Betty Birch	81658		<input type="checkbox"/>	

- Check-boxes such as Confirmation or Allow Move enables the option to auto-send confirmations or allow the reservation to move rooms.

Confirm To Guest: tem_csete@resortdata.com Confirmation

Credit Card Number of Cards: 0

Card Number Enter or Swipe Card Exp. Date / Change

Auth. Code

Source of Bus. 01 - Returning Guest

Market Code 01 - F.I.T. Transient Allow Move

- Dates, Room Type, Room # and Rates are managed through special Rate related buttons located in the upper left hand corner of the reservation.

Change Reservation

P6: Preassign - Checked In

Res# Adlt Teen Chld Pets

Rate Plan Type

Rate Room OK Property

Arrival Nights Departure

Change Rate Related Fields

- These changes can trigger a rate change or may affect availability
- If there is a rate change the user will be prompted to Keep Old Rates or Use New Rates

Change tracking

Changes to a reservation can be tracked with the Change Tracking module.

36 - Hotel Control System - HMP Win by Resort Data Processing, Inc. (www.ResortData.com)

File Edit View Options Work Orders Reports Status CRM Modules RM Accounting System Logout Help

T2 Find Rate Find T4 Custom Fields T5 New Rate T6 Arrivals T7 In-house T8 Departures WS T12 QuickView

Outline

- Change Orders
- Confirmation
- Add Rooms
- Sharewith
- Tools
- Address
- Group
- Add Work Order
- Add Tasks
- Check in
- Make Checkin
- Checkin System
- Key Card Options
- Post Charge
- Deposit Payment
- Printed
- Transfer
- All Changes to Global Root

Refresh Guest: Dad Abbott - Room 156 - Floor 52G (P4: Preassign - Future)

Change Tracking

Name	Date	Initial	Type	Arrive	No	Depart	Room	Type	Stat	Sharewith	Leader	Group	Agent	OTMR	Rate	Tax	De Due	Charges	Folio A	Folio D	Folio I	Folio M	Folio L	TA Code	TA Split
Abbott, Dad	03/01/15	TA	03/01/15	3	03/01/15	52G	K							0001150	100.00	RACK	417.30	417.30	0.00	3.00	417.30	0.00	0.00		

Reservations: 1 | Group: None | Arrive: 2 | Leave: 1 | Children: 0 | Pets: 0

Cancel Reservation: Now 156 | Arr: Abbobdud | Room: 52G | Room Type: K | 03/01/15 to 03/02/15 | 1 | Guest: Dad Abbott

Res. Detail | Change Summary | Folio | Credit Card | Daily Charges | Inventory | Preferences | Comments | More | Housekeeping | Top Center | Tools | Work Orders | Guest History | Agents | Rates | Dues | Misc | **Changes** | Schedule | Savings | Tools

Display: 00 Summary | Date | Detail | Main Reservation

Date Changed	Changed By	Name	Arrive	No	Depart	Room	Type	Stat	Sharewith	Leader	Group	Agent	OTMR	Rate	Tax	De Due	Charges	Folio A	Folio D	Folio I	Folio M	Folio L	TA Code	TA Split
03/01/15 12:46 PM	ATM	Abbobdud	03/01/15	3	03/01/15	52G	K						0001150	100.00		417.30	417.30	0.00	3.00	417.30	0.00	0.00		
03/02/15 12:00 AM	(Original Record)	Abbobdud	03/02/15	3	03/02/15	101	K						0001150	100.00		417.30	417.30	0.00	3.00	417.30	0.00	0.00		

- The Changes tab will hold the Change Tracking logs, and can be accessed from the reservation
- Changes for all reservations can also be found under System > Change Tracking > Analysis
 - Can use multiple variables, such as

LIFE OF A RESERVATION

Every reservation has a set of functions that will most likely be performed on it during the course of an individual's stay. This is what we refer to as the "life" of a reservation. This section will outline these common functions.

Check-In

To check a reservation in:

- Find the reservation using F3 (Find Res) or F6 (Arrivals)
- From the Options Panel, select Check-In
 - Inventory check-ins will require that a room be assigned
 - This screen is the same as the Available Rooms screen (see Reservations outline for details)
 - Verify Room Status as Clean and Occupancy as Vacant
- You can also change the room at this point if desired
- Once a room is selected, the Check-In screen will prompt to take a payment
 - Note that you do not have to do this, and can select None if payment is taken upon check-out

Check-in for Birch/Kenny

Comments Notes Itinerary Folio

Res# 164 Type P2 Name Birch/Kenny Group Adlt Teen Child Pets
Arrive Sun 3/1/2015 Nts 2 Depart Tue 3/3/2015 Leader 2 0 0 0
Room 204 Type DD Status Clean Share Avg Rate 157.00 Plan B250

Room Status: Clean
Occupancy: Vacant

Folio I Balance \$258.98

Folio I Balance \$258.98

Select: None Payment Authorize CC

Select: Cash Check Credit Card Wire Misc

Amount 258.98

Card Number Exp. Date / (MM/YY)
Cardholder Name
Auth. Code Correction / Voice Auth

Card Number Exp. Date / (MM/YY)
Credit Card Swiped
Auth. Code Auth. Amount

VIP Allow Move Guar Don't Mass Email

Rate Plan	B250	Avg Rate	157.00
Chf Plan		Total Rate	314.00
		Other Charges	0.00
		Total Tax TA	21.98
		Security Deposit 2	0.00
		Total Charge	335.98
		Paid Deposit	77.00
		Balance Due	258.98
		Transfer To Group	0.00
		Transfer To Leader	0.00
		Folio A Balance	0.00
		Folio B Balance	0.00
		Folio I Balance	258.98
		Credit Limit	0.00

Comments Guest History Process Payment Check-In Change Room Print Reg Card Close Help

Credit Card: Enter the amount of the Payment and the credit card information

- Click Check-in

After a reservation is checked-in, the Continue With screen will appear, allowing you several options – such as staying with this reservation, or navigating back to the Arrivals screen.

The screenshot shows a window titled "Continue With..." with a close button (X) in the top right corner. The window content is as follows:

Check-In Successful

Guest: Morgan/Liz

Res#: 339 Room: 527

Arrive: Sun 3/1/2015 Days: 1 Depart: Mon 3/2/2015

Status: P5: Preassign - Checked In

Select where to go next:

- This Res Continue with the current reservation <Enter>
- Return Return to the last display <Esc>
- Send Text Send Text
- Deposit Apply a deposit to the current reservation
- Find Res Find another reservation <F3>
- Arrival View the Arrival list
- In-House View the in-house list <F7>
- Departures View the Departure List
- Print Receipt Print receipt for the last payment

If your check-in is late, a prompt will appear asking how to handle charges. Depending on your property's late policy, you can either choose to post the missed nights' charges, or to change the arrival date and drop the prior nights' charges.

The screenshot shows a window titled "Late Check-In" with a close button (X) in the top right corner. The window content is as follows:

This is a late check-in.

The guest was due to arrive Saturday, February 28, 2015 and depart Monday, March 2, 2015.

- Check-in this reservation and charge the guest for all past days. The reservation arrival date will remain Saturday, February 28, 2015. The date on all charges prior to Sunday, March 1, 2015 will be changed to Sunday, March 1, 2015 so that the night audit reports for past days will not be changed.
- Change the arrival from Saturday, February 28, 2015 to Sunday, March 1, 2015. The departure date will remain Monday, March 2, 2015. All charges prior to Sunday, March 1, 2015 will be deleted.
- Display this reservation in the change screen to allow dates to be changed manually.

Buttons: Continue Cancel

Once the reservation is checked-in, you can locate it with the F3 (Find Res) or F7 (In-House) shortcuts.

Posting Charges

A reservation can have charges added and viewed in multiple locations.

- Folio tab: When a reservation is highlighted, click on the Folio tab to view a breakdown of the charges currently set towards a reservation

Current Reservation: Res# 340 | P6 | Megan/Liz | Room: 125 | Room Type: G | 3/1/2015 to 3/2/2015 | Guar: No

Res Detail | Charge Summary | Folio | Credit Card | Daily Charges | Itinerary | Preferences | Comments | Notes | Housekeeping | Pay Codes | Tasks | Work Orders | Guest History | Agents | Rooms | Owner | Misc | Changes | Stats

Folio

Print Charges | Folio Fiber: All | All | Total: 166.20 | Payments: 0.00 | Due: 166.20 | Hide No Prints

Preview Change 1 | Folio Type: All | Actual: 26.50 | 0.00 | 26.50 | Show Rate Plan Total

Email Post Charge

Drag a column header here to group by that column.

Date	Pre	Flg	Cd	Q	Bkt	Description	Price	*	Qty	Charge	Tax	Total	Ty	Flg	In Flg	No Prt	No Prt#	Seq#	Rate Plan
02/29/15	-		B225	2		Parking Garage	10.00		1.00	10.00	0.00	10.00	A*					00004352	
02/29/15	-		B224	2		Parking Surcharge	1.00		1.00	1.00	0.00	1.00	I					00004353	
03/01/15	-		B200	R		Nightly Chg - Room 1/2	110.00		1.00	110.00	7.70	117.70	I	V				00004351	BACK
03/01/15	-		B225	2		Parking Garage	10.00		1.00	10.00	0.00	10.00	I					00004354	
03/01/15	-		B224	2		Parking Surcharge	1.00		1.00	1.00	0.00	1.00	I					00004355	
03/01/15			B213	1		Bar Service	25.00		1.00	25.00	1.50	26.50	A*					00004356	
03/01/15			B215	1		Breakfast	15.00		1.00	15.00	0.50	15.50	F*			*	00004358	00004357	
03/01/15			B215	1		Breakfast	-15.00		1.00	-15.00	-0.50	-15.50	F*			*	00004357	00004358	
							107.00			9.20		166.20							

- The following fields are the ones that you will most likely take note of on a daily basis:
 - Date: the date that the transaction was posted
 - Pre: the flag for if a charge was pre-posted
 - Cd: the code for the transaction (the first two digits indicate the ledger table, and the latter two indicate the tax code)
 - Bkt: the bucket (used to separate transactions for RDP purposes)
 - *: the override flag, indicating if a rate has been overridden
 - Ty: the folio that the charge will be posted in
 - A, B, I, M, L
 - Used mostly for groups and will cover in depth in that class
 - Can be used to separate details for a guest (work, spouse, personal)
 - No Prt: the No Print flag, indicates that a charge will not be included on the printed receipt
 - This is usually set for deleted transactions and corrections
 - No Print transactions can be hidden by ticking the “Hide No Prints” checkbox
 - No Prt#: the transaction number of the corresponding correction

- The folio can also be filtered and viewed by the drop-down containing the following options:
 - All: all transactions, posted and pre-posted
 - Actual: only posted transactions
 - Pre-posted: only pre-posted transactions
- Charge Summary tab: This tab contains the rate plan information, other charges, and balance dues for a specific reservation

Current Reservation: Res# 340 | P6 | Morgan/Liz | Room: 125 | Room Type: Q | 3/1/2015 to 3/2/2015 | Guar: No

Res. Detail | **Charge Summary** | Folio | Credit Card | Daily Charges | Itinerary | Preferences | Comments | Notes | Housekeeping | Pay Co

Folio Filter: All | Control Rate Plan: | Rate Plan: RACK | Avg. Rate: 110.00

Charge Totals		Other Charges - Detail		Balance Dues	
Total Rate	110.00	Other Charge 1	25.00	To Group	0.00
Other Charges	47.00	Other Charge 2	22.00	To Leader	0.00
Total Tax TA	9.20	Totals	47.00	Folio A IP	36.50
Total Charge	166.20			Folio B IP	0.00
Payments	0.00			Folio I	129.70
Balance Due	166.20			Credit Limit	0.00

- You can filter the folio by All, Actual, and Pre-Posted here as well
- Post Charge: From either the Post Charge button in the Folio tab or the Options panel, charges can be posted to an account

Post Charge

Comments | Notes | Itinerary | **Folio**

Res# 340 | Type P5 | Name Morgan/Liz | Group | Adlt 2 | Teen 0 | Child 0 | Pets 0

Arrive Sun 3/1/2015 | Nts 1 | Depart Mon 3/2/2015 | Leader | Share | Avg Rate 110.00 | Plan RACK

Room 125 | Type Q | Status Clean

Old Total	New Charges	New Total	Credit Limit	Credit Left	Individual
0.00	25.50	25.50	0.00	-25.50	25.50

Charge Date: Sun 03/01/15 | Transaction Code: Select | Description: | Price: 0.00 | Quantity: 1.00 | In Pkg: | Folio Type Override: Default

Post 1 & Close | Add to List | Add Package to List

New Charges to be Saved

Date	Pre	Code	Description	Price	Qty	Charge	Tax 1	Tax 2	Total
03/01/15		B213	Bar Service	25.00	1.00	25.00	0.00	1.50	26.50

Save List | Save List & Close

Folio

Drag a column header here to group by that column.

Date	Pre	Code	Bkt	Description	Price	Qty	Charge	Tax	Total	Ty	Pkg	In Pkg	No Pkg	No Pkg#	Seq#	Rate Plan
02/26/15	*	B223	2	Parking Garage	10.00	1.00	10.00	0.00	10.00	I					00004352	
02/28/15	*	B224	2	Parking Surcharge	1.00	1.00	1.00	0.00	1.00	I					00004353	
03/01/15	*	B200	R	Nightly Chg. - Room % 12	110.00	1.00	110.00	7.70	117.70	I	V				00004351	RACK
03/01/15	*	B223	2	Parking Garage	10.00	1.00	10.00	0.00	10.00	I					00004354	

Display Folio | Close | Help

- Select from the drop-down or just type in the code if you know it
- The description will auto-fill
 - You can edit the description and add information as needed
- Enter in the price
 - A default amount can be set on the transaction code
- Enter in the quantity
- Indicate the folio type (which folio to post the charges to)
- Two options for posting:
 - Post 1 & Close
 - No chance to review, so use with caution
 - Add to List
 - Useful if you're posting multiple transactions or want to preview before saving
 - Save List will apply the transactions to the folio
- Change: If an error is made in a posted charge, the charge can be fixed through the Change option, found in the Folio tab.

Change/Reverse Charges

Comments Notes Itinerary

Res# 340 Type P6 Name Morgan/Liz Group Adlt Teen Child Pets
 Arrive Sun 3/1/2015 Nts 1 Depart Mon 3/2/2015 Leader 2 0 0 0
 Room 125 Type Q Status Clean Share Avg Rate 110.00 Plan RACK

Folio Filter: All Folio Type: All Hide 'No Prints' Show Rate Plan Total

<input type="checkbox"/>	Date	Pre	Cd	Bkt	Description	Price	Qty	Charge	Tax	Total	Ty	Pkg	In Pkg	No Prt	No Prt#	Seq#
<input type="checkbox"/>	02/28/15	*	8223	2	Parking Garage	10.00	1.00	10.00	0.00	10.00	A*					00004352
<input type="checkbox"/>	02/28/15	*	8224	2	Parking Surcharge	1.00	1.00	1.00	0.00	1.00	I					00004353
<input type="checkbox"/>	03/01/15	*	8200	R	Nightly Chg. - Room %:2	110.00	1.00	110.00	7.70	117.70	I	V				00004351
<input type="checkbox"/>	03/01/15	*	8223	2	Parking Garage	10.00	1.00	10.00	0.00	10.00	I					00004354
<input type="checkbox"/>	03/01/15	*	8224	2	Parking Surcharge	1.00	1.00	1.00	0.00	1.00	I					00004355
<input type="checkbox"/>	03/01/15		8213	1	Bar Service	25.00	1.00	25.00	1.50	26.50	A*					00004356
										157.00	9.20	166.20				

- The change options are as follows:

- Change

- On posted charges, you can modify description, price, and folio
 - On pre-posted charges, you can only modify the folio
 - In some cases, changing a transaction will “reverse” the original and create a new transaction
 - Old transactions will be flagged as No Print

- Transfer

- Charges can be moved to another current or past reservation
 - Cannot send to a future reservation

- Delete

- Reverses off a posted transaction and both are marked as No Print
 - If the reservation is still due to arrive, it will completely remove the transaction

- No Print

- Flags transactions to not print on the folio
 - Net of selected transaction(s) must be zero

- If a credit card is on file, two more options will be available:

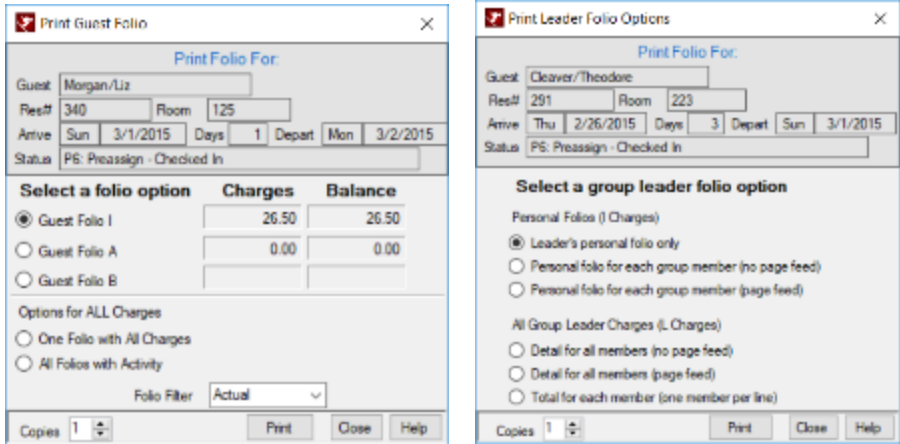
- Print Receipt

- You can double click the transaction to print as well

- Refund

- Refunds a specific transaction, not merely an amount

- Print, Preview, or Email Folio: If a receipt is required, either for accounting purposes or because a guest requested it, the options to print, preview, and email a folio are located in the Folio tab



- Select Folio (A, B, I, M, L)
 - If you select All Folios, can do as one report, or separate pages by Folio Type

Payments/Refunds/Transfers

Similarly, payments and refunds can be taken in several locations.

- Deposit/Payment: The option to take a payment or authorize a credit card on a reservation can be made via the Options pane.

Payment for Morgan/Liz

Comments Notes Itinerary Folio

Res# 340 Type P6 Name Morgan/Liz Group Adt 2 Teen 0 Child 0 Pets 0
 Arrive Sun 3/1/2015 Nts 1 Depart Mon 3/2/2015 Leader
 Room 125 Type Q Status Clean Share Avg Rate 110.00 Plan RACK

Folio I Balance \$26.50

Folio I Balance \$26.50

Select: None Payment Authorize CC

Select: Cash Check Credit Card Wire Misc

Amount 26.50

Card Number Exp Exp

Cardholder Name

Auth. Code Correction / Voice Auth

Card Number Exp. Date (MM/YY)
 Credit Card Enter or Swipe Card Swiped
 Auth. Code Auth. Amount

Rate Plan	RACK	Avg Rate	110.00
Ctrl Plan		Total Rate	0.00
		Other Charges	50.00
		Total Tax TA	3.00
		Security Deposit 2	0.00
Actual		Total Charge	53.00
		Payments	26.50
		Balance Due	26.50
		Transfer To Group	0.00
		Transfer To Leader	0.00
		Folio A Balance	0.00
		Folio B Balance	0.00
		Folio I Balance	26.50
		Credit Limit	26.50

Process Skip Close Help

Credit Card: Enter the amount of the Payment and the credit card information

- The static payment options are as follows: Cash, Check, Credit
- Wire and Misc can be defined though the C1PAY5 and C1PAY6 switches
- If entering a card manually, always get the CID and zip code
- Refund: Refunding payments can be made via the Options pane

No Money Due

Max Refund \$26.50

Select Refund Option: None Refund

Select: Cash Check Credit Card Wire Misc

Amount 26.50

Card VISA Number 12

Cardholder Name

Auth. Code

Card Number Exp. Date (MM/YY)
 Credit Card Enter or Swipe Card Swiped
 Auth. Code Auth. Amount

Rate Plan	RACK	Avg Rate	110.00
Ctrl Plan		Total Rate	0.00
		Other Charges	25.00
		Total Tax TA	1.50
		Security Deposit 2	0.00
Actual		Total Charge	26.50
		Payments	26.50
		Balance Due	0.00
		Transfer To Group	0.00
		Transfer To Leader	0.00
		Folio A Balance	0.00
		Folio B Balance	0.00
		Folio I Balance	0.00
		Credit Limit	26.50

Refund

A refund amount of 26.50 has been entered. Continue with refund?

Yes No

- Note that a refund cannot exceed the payments made currently on the reservation
- Transfer: Similar to transferring transactions, funds can also be moved from one reservation to another via the Options pane.

Transfer from Morgan/Liz

Comments Notes Itinerary Folio

Res# 340 Type P6 Name Morgan/Liz Group Adlt 2 Teen 0 Child 0 Pets 0
 Arrive Sun 3/1/2015 Nts 1 Depart Mon 3/2/2015 Leader
 Room 125 Type Q Status Clean Share Avg Rate 110.00 Plan RACK

Max Transfer \$26.50

Amount 26.50 Res Find...
 Guest Room Res#

Card Number Exp. Date / (MM/YY)
 Credit Card Enter or Swipe Card Swiped
 Auth. Code Auth. Amount

Rate Plan	RACK	Avg Rate	110.00
Ctrl Plan		Total Rate	0.00
		Other Charges	50.00
		Total Tax TA	3.00
		Security Deposit 2	0.00
Actual		Total Charge	53.00
		Payments	26.50
		Balance Due	26.50
		Transfer To Group	0.00
		Transfer To Leader	0.00
		Folio A Balance	0.00
		Folio B Balance	0.00
		Folio I Balance	26.50
		Credit Limit	26.50

Process Skip Close Help

Transfer: Enter the amount and select a reservation

Bill Charges To

To move transaction charge amounts from one reservation to another, utilize this via the Options pane.

Bill To Reservation

From To

Reservation # 340 339 Find...

Name Morgan/Liz Morgan/Liz

Reservation Type P6: Preassign - Checked In P5: Preassign - Checked In

Move Folio Balance From Folio I

Folio I balance prior to billing 26.50 -150.10

Billing Amount 26.50 Bill Entire Balance 26.50

Folio I balance after billing 0.00 -123.60

Save Close Help

- Commonly used for groups, but can be used to move balance from one reservation to another
- Cannot be sent to future reservations
- If back-to-back reservations, simply check-in the new one first, then can Bill Charges To

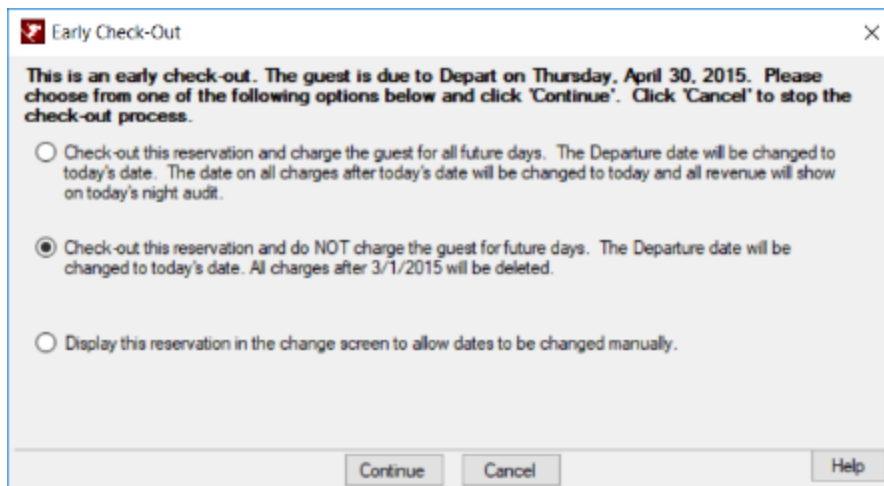
Check-out

When a reservation leaves, they are checked out via the Options pane.

- Listed below are the notable sections on this screen:

1. Folio Balance: This is an easy indication of the remaining balance on a folio upon check-out
 - This section auto-updates upon receiving payment
 - Will change to say “No Money Due” if the balance is zero
2. Folio Options: On this screen, you can also preview, print, or email the folio
 - Charges can be added from this screen as well

3. Process and Check-Out: If a balance is present on a reservation, the Process Payment button will be selectable
 - You can also opt not to take a payment upon check-out and select the Check-Out with Balance button
 - This option can be password protected
 - There can also be an automatic prompt to print a folio upon checkout
 - Similar to a late check-in, an early check-out will prompt the user for options



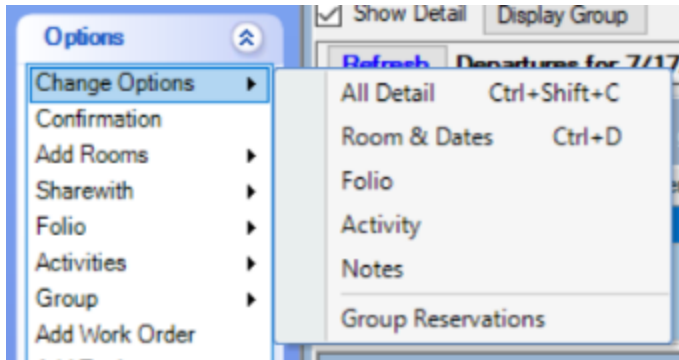
- Charge for all future dates
 - Departure date is changed to today's date, and all revenue shows today
- Don't charge for future dates
 - Departure date is changed to today's date, and future revenue is removed
 - If not charging for future dates, the system will prompt to:
 - Post a room charge for just tonight (late departure fee)
 - Include in tonight's statistics

FRONT DESK OPTIONS

The Options sidebar contains multiple other ways of working with reservations. Listed below are the options covered in this session:

Change Options

This serves as another way to make changes to a reservation. You can choose from the options shown below:



- All Detail will bring up the same screen as double-clicking on a reservation.
- Room & Dates allows you to change the room type/number and dates of a reservation
 - Utilize the Availability button to ensure no conflicts or overbooking
 - There will likely be a rate change; you will either have to keep the old rate or change to the new one.

Res#	80	Type	P6	Name	Dolenz/Mickey		Group	MONKEES												
Arrive	Tue	2/24/2015		Nts	6		Depart	Mon	3/2/2015		Leader	78	Adlt	2	Teen	0	Chld	0	Pets	0
Room	103		Type	K		Status	Clean		Share			Avg Rate	105.33		Plan	GRP1				

This reservation has activities. If the dates are changed, the dates on the activities will be adjusted accordingly. Please check the activities after the change is made to make sure they are correct.

Minimum Nights

Arrival Nights Departure

Room Type Block

Yield Mgmt Availability Room Type Info

SMK VEW BAL HDC JAC

Room Remove Allow Move

Available Rooms Tape Chart

Detail Room# Info Room# Web Info

Save & Close Close Help

- Folio displays the Change/Reverse Charges panel
- Activity displays the Change Activity panel

- This will be covered in depth in the Activities training session
- Notes displays the Notes panel, where you can add or edit existing notes on a reservation
- Group Reservations allows you to make changes to a group reservation
 - This will be covered in depth in the Groups training session

Confirmations

This option allows you to email or print a confirmation to a reservation after it has been created in the system.

- You can access these confirmations from one of the following options:
 - The Options pane
 - Right-click a reservation and select Email or Print Confirmation

Folio

This option in the sidebar is simply another place to make changes to the folio. (See above sections for more details.)

Activities

Additional activities, such as ski passes and golfing, can be scheduled and added to a folio for specific days through RDP. This will be covered in depth in the Activities training session.

Group

RDP offers a group check-in and check-out functionality for smaller groups. This will be covered in depth in the Groups training session.

Add Work Order

Certain work orders – such as replacing a broken fixture – can be attached to a room and managed through the Options pane. This will be covered in depth in the Work Order training session.

Add Task

Tasks – such as delivering a requested item to a guest – can be attached to a reservation and managed through the Options pane. This will be covered in depth in the Work Order training session.

Mass Check-in

This option allows for the check-in of multiple reservations at once.

Check-in All Arriving Guests

	TY	Res #	Name	Room Type	Room	Arrive	Depart	Reservation Stat. ^
<input checked="" type="checkbox"/>	P1	338	Conway/Tim	N/RPRK	SPACE008	03/01/15	03/03/15	
<input checked="" type="checkbox"/>	P2	164	Birch/Kenny	DD	204	03/01/15	03/03/15	
<input checked="" type="checkbox"/>	P4	274	Blues/Jake	KA	805	03/01/15	03/02/15	
<input checked="" type="checkbox"/>	P4	275	Blues/Elwood	KA	807	03/01/15	03/02/15	
<input checked="" type="checkbox"/>	P4	337	Allen/Tim	N/RPRK	SPACE004	03/01/15	03/03/15	
<input type="checkbox"/>	P4	279	Short/Martin	DD	208	03/01/15	03/03/15	Room Not Ready
<input type="checkbox"/>	I4	162	Crystal/Billy	DD		03/01/15	03/03/15	Room Number Not Assigne
<input type="checkbox"/>	I4	163	Burnett/Carol	DD		03/01/15	03/03/15	Room Number Not Assigne
<input checked="" type="checkbox"/>	P4	166	Eastwood/Clint	K	102	03/01/15	03/03/15	
<input checked="" type="checkbox"/>	P4	158	Allen/Tim	DD	120	03/01/15	03/03/15	
<input type="checkbox"/>	I4	159	Conway/Tim	DD		03/01/15	03/03/15	Room Number Not Assigne
<input checked="" type="checkbox"/>	P4	149	Pfeffer/Michelle	DD	107	03/01/15	03/03/15	
<input type="checkbox"/>	I4	336	Kirk/James T.	DD		03/01/15	03/05/15	Room Number Not Assigne
<input type="checkbox"/>	P4	270	Reed/Steve	K	424	03/01/15	03/05/15	Room Not Ready
<input type="checkbox"/>	P4	271	Leskanic/Curtis	K	425	03/01/15	03/05/15	Room Not Ready
<input checked="" type="checkbox"/>	P4	272	Owens/Jayhawk	K	524	03/01/15	03/05/15	
<input checked="" type="checkbox"/>	P4	261	Weiss/Walt	DD	111	03/01/15	03/05/15	
<input checked="" type="checkbox"/>	P4	262	Castilla/Vinny	K	123	03/01/15	03/05/15	
<input checked="" type="checkbox"/>	P4	263	Bichette/Dante	K	124	03/01/15	03/05/15	
<input type="checkbox"/>	P4	264	Burks/Ellis	K	223	03/01/15	03/05/15	Room Not Ready
<input type="checkbox"/>	P4	265	Walker/Larry	K	224	03/01/15	03/05/15	Room Not Ready
<input type="checkbox"/>	P4	266	McCracken/Quinten	K	225	03/01/15	03/05/15	Room Not Ready
<input checked="" type="checkbox"/>	P4	267	Reed/Jeff	K	301	03/01/15	03/05/15	

Members Checked Out: 0%

- Generally, this option is not used, and should be disabled as a result
- You cannot check someone in if their room is not ready!

Telephone Options

This requires the RG (Phone Actuator) module.

- This allows for some phone console options directly through RDP
 - Can be helpful if you are not stationed near the console
 - These options depend on the phone switch
 - However, this can also add another layer of failure potential

Key Card Options

This requires the RY (Key Card Interface) module.

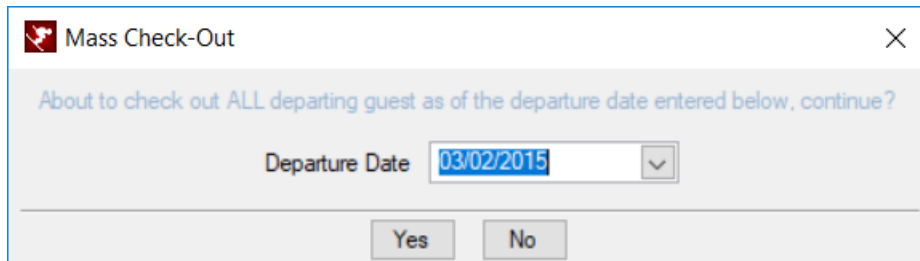
- This allows you to activate room key cards through RDP
 - Can help with streamlining the check-in process

Global Post

Like mass check-in, this is another rarely used option, and it requires special training for proper use. If you do not frequently use this option, it should be disabled.

Mass Check-out

This option allows you to check-out every reservation set to depart on a specific day.

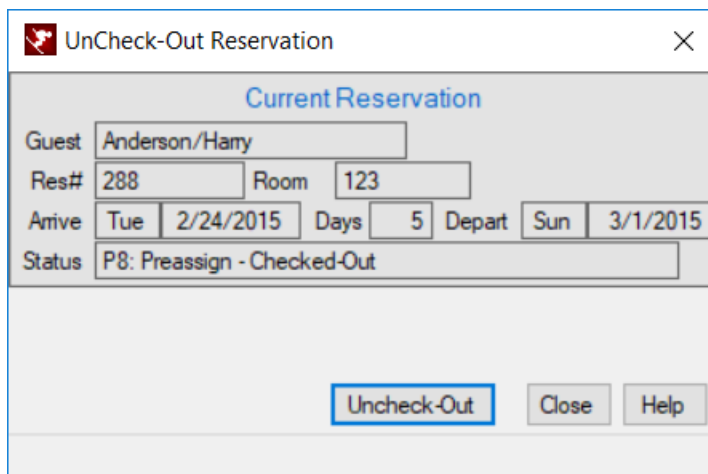


The screenshot shows a dialog box titled "Mass Check-Out" with a close button (X) in the top right corner. Below the title bar, there is a blue header with the text "About to check out ALL departing guest as of the departure date entered below, continue?". Below this header, there is a label "Departure Date" followed by a text input field containing "03/02/2015" and a dropdown arrow. At the bottom of the dialog, there are two buttons: "Yes" and "No".

- Generally, this option is not used, and should be disabled as a result

UnCheck-Out

This option allows you to undo the check-out of a reservation.

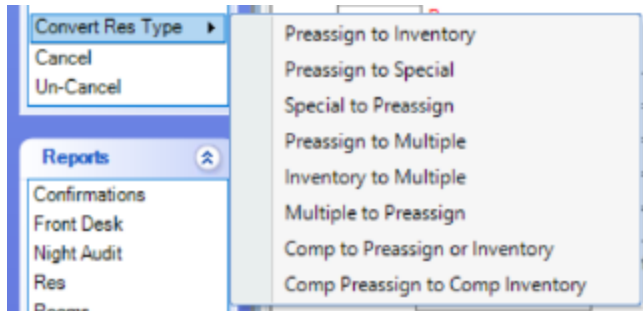


The screenshot shows a dialog box titled "UnCheck-Out Reservation" with a close button (X) in the top right corner. Below the title bar, there is a blue header with the text "Current Reservation". Below this header, there is a form with the following fields: "Guest" (Anderson/Harry), "Res#" (288), "Room" (123), "Arrive" (Tue 2/24/2015), "Days" (5), "Depart" (Sun 3/1/2015), and "Status" (P8: Preassign - Checked-Out). At the bottom of the dialog, there are three buttons: "Uncheck-Out", "Close", and "Help".

- Instances when this could be used are as follows:
 - If a reservation was mistakenly checked-out
 - If a guest comes back and wants to extend
 - In this case, it's usually just easiest to make a new reservation

Convert Res Type

If you need to change the type of reservation – for example, from a preassigned to an inventory – this option allows you to do so.



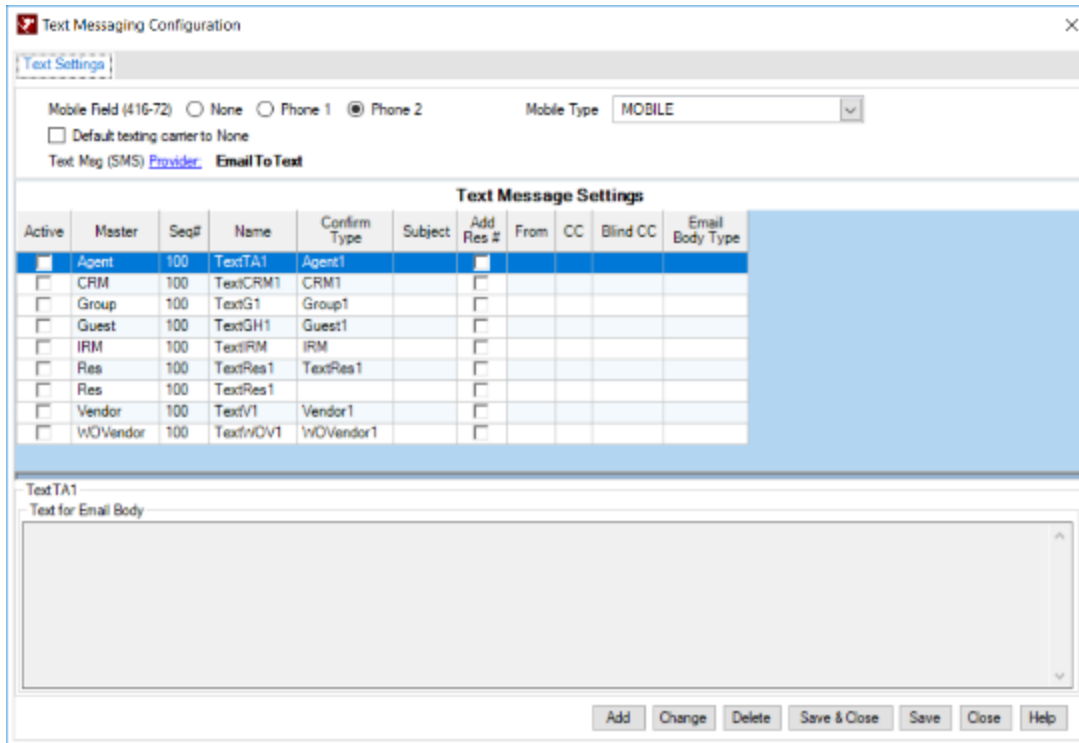
- This is used if you have mistakenly created a reservation in the wrong type
- Reservation types can be found under the F4 Custom Help shortcut

Cancel/Un-Cancel

In the event that someone decides to cancel their reservation, this option allows you to cancel a reservation that has not yet been checked in. Similarly, if a reservation has been incorrectly cancelled, or a correction needs to be made, a cancelled reservation can be un-cancelled as well. This will be covered in depth in the Reservations training session.

Text communication

When configured, this option allows you to send status updates to guests as text messages.

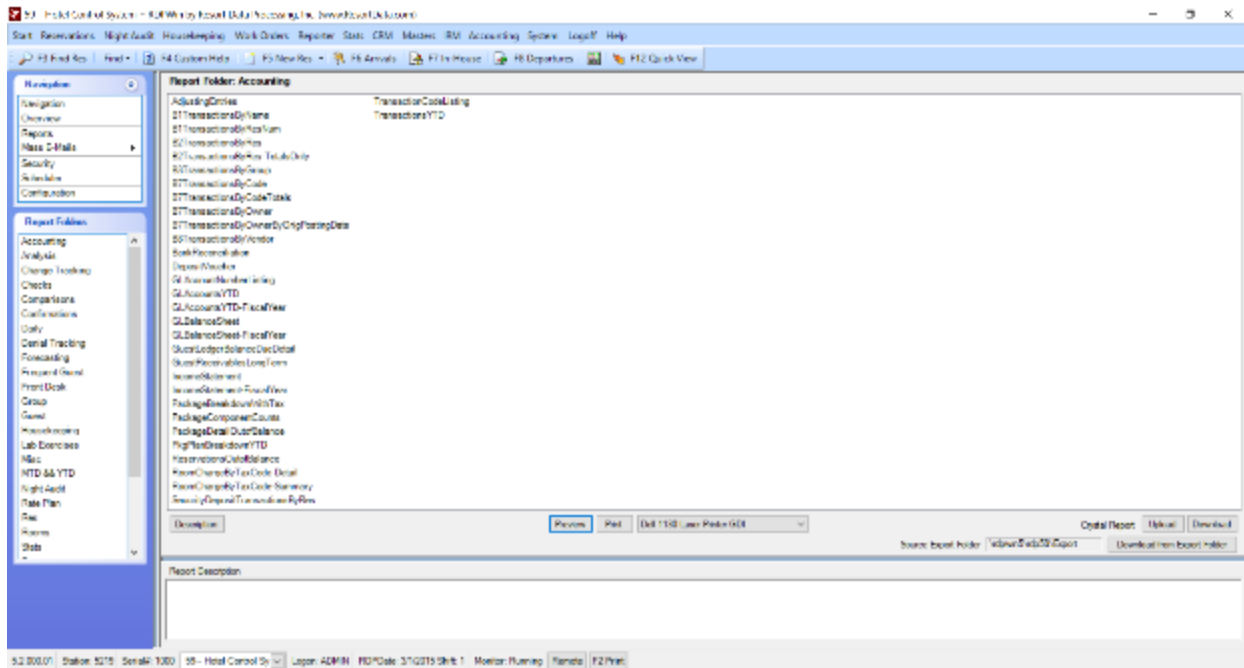


- This requires the “mobile number” and “carrier” fields in the reservation details to be filled out
- The system can also auto text when room is ready if Guest Waiting is enabled
 - The Waiting button must be checked on reservation
 - Room status must be changed to Clean by RDPWin
 - This does not work through the maid interface

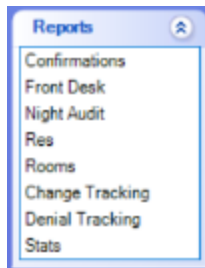
PRINTING REPORTS

Access reports

To access RDP’s reports, go to Reporter > Reports and select the appropriate folder.



- Alternatively, the left side panel contains a Reports shortcut menu
 - The options within correspond to the current screen



Select report

Once you've found the folder that holds the report you need, select the report by either single- or double-clicking.

- Single-clicking will bring up the report description in the Reports Description panel
- Double-clicking will open the report preview and allow you to view the report

Parameters

Some reports will contain parameters – such as a date range or a reservation number. An example is shown below:

Enter Parameter Values

Arrival Date Range - Format: "12/31/1999" ArrivalRange

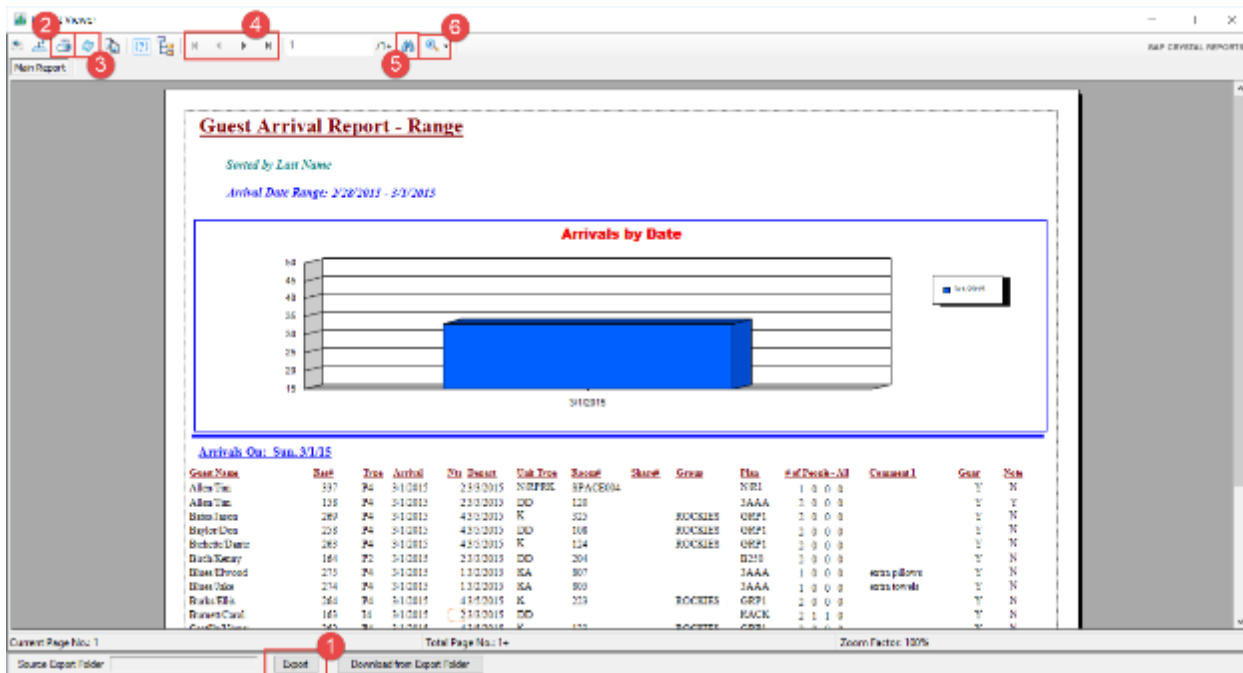
Start of Range: End of Range:

Enter a Value: Enter a Value:

Include this value No lower value Include this value No upper value

OK Cancel

- If a report requires parameters, they will likely need to be filled in
 - Default options can be configured and selected



- The report preview screen allows you to:
 1. Export the report
 2. Print the report
 3. Refresh the data in the report
 - This usually requires you to re-enter the parameters
 4. Move through the pages of the report

5. Find text in the report
6. Zoom in or out of the report