

Group Reservation, Part 2

- Creating a Joint Account für a Group
- Administering the Group's revenues

Getting to know protel Step by Step

Video-Tutorial on
www.protel-net.com

This Tutorial is the second part of our small series on creating and managing group reservations in protel. It mirrors the video tutorial that you can find on protel's website.

What is this part about?

This part shows you how to create a joint account for the group and use it to administer all the group's revenues easily and reliably.

Why you should read the first part first

The first part of this tutorial demonstrates how you can create and manage group reservations in protel, especially how you allocate rooms to a group and how to change names.

Why is this important?

Group reservations are a good idea whenever you want to edit data for several reservations at once, or whenever you reserve several rooms that are going to be billed together.

Using protel, one click at a time

Simply follow the instructions below, one step at a time. You may have to modify the data (check-in and check-out date, room type names, etc.) depending on your own protel system!

Making Reservations for Several Rooms

Setting the stage for today's tutorial

Ms Sandra Silk is on the phone. Her company, Knowall Ltd., is sending her and two other employees to a training course in our town, and now she wants to reserve three standard twin rooms from the fifth to the eighth of February, 2008.

Opening the room type plan

First open the room type plan by pressing the [F2] function key.

Increase the default number of rooms to "3":

PRDB	1	2	2
PRTB	1	0	0
STFAM	1	3	2
STTB	3	18	15
STDB	1	18	19
STTP	STTB Standard Twin Room		
STSB			

Reserving several rooms at once

Use your mouse to drag the reservation out over the desired timeframe:

2	1	1	1	1
0	0	0	0	0
2	2	2	2	2
5	8	8	18	18
19	18	17	16	16
2	2	2	2	STTB/08/02/08
6	5	5	6	7

Press [Enter] to open the "Reservation" dialog

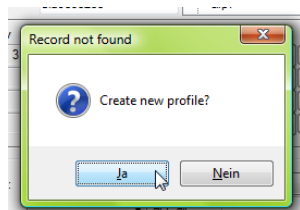
Entering Data for a Reservation: Group

Entering a group's name
- a notation tip

When entering group reservations, you should always enter the group's name first. It's a good idea to pick a name that contains an abbreviated customer name and the arrival date. Your group is arriving on the 5th of February for Knowgood Ltd. So call the group: Know050208.

Status	Arrival	Ngh	Dprt.	Qty	R. type	R. no.
1 GTD CC	05/02/08	3	08/02/08	3	STTB	

Once you exit the field, protel searches the database and tells you that no data records were found for this name:



Click [Yes] / [Ja] to have protel create a new profile and immediately display it.

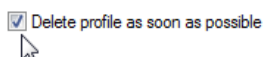
New Group Profile = Creating a Group Master

The group master's purpose: to
combine several reservations

You already know what a guest profile is. However, this profile is something different. Its sole purpose is to link together the reservations of our four group members so you can manage their data and balance their accounts centrally. That's why it is called "group master".

A group master is only used once.

Group masters are only used once. As soon as all the group's liabilities have been settled, however, the group master is no longer needed. That's why you tell protel to delete the group master as soon as possible simply by placing a checkmark in front of "Delete profile as soon as possible":

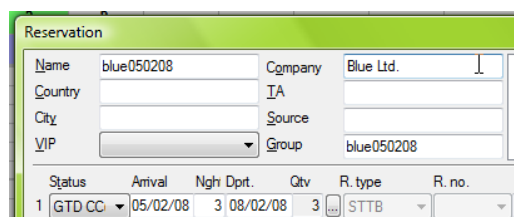


From now on, this group master will control every aspect of managing the group at your hotel. You will be seeing it again soon, in other words!

For now, though, click [OK] to return to the Reservation dialog.

Entering Data for Reservations: Company

protel has entered the group's name in the "Name" field of the reservation.

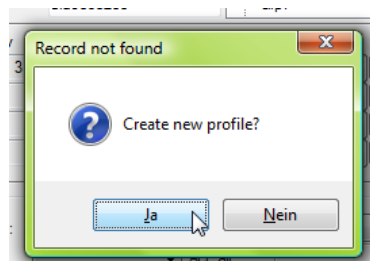


Status	Arrival	Nigh	Dprit.	Qty	R. type	R. no.
1 GTD CC	05/02/08	3	08/02/08	3	STTB	

BY THE WAY: See part I of this tutorial to learn how to enter an individual name for each group member.

Next, you enter the name of the company who will receive the bill for the group. Once again, as soon as you exit the field, protel searches our database and tells you that ...

Creating a company profile



... no data records were found for this company. So, click [Yes] and have protel create a new profile for Blue Ltd. and display it.

Creating a New Company Profile: Contact Persons

Enter information on contact person

First, let's enter **Blue Ltd.**'s contact persons in the company profile. To do this, click the button with the three dots in the "Contact Res." row to open the "Contact Persons" dialog:

Type in "Silk" in the surname field and "Sandra" in the first name field. Since Ms. Sandra Silk is responsible for both the reservations and the invoice, check the line "Contact persons for invoices and reservations are identical".

Then, choose a form of address to use in all future correspondence, including invoices. To do this, click the button with the three dots in the "Salutation" line to open the "Select Salutation" dialog:

Choose correct salutation

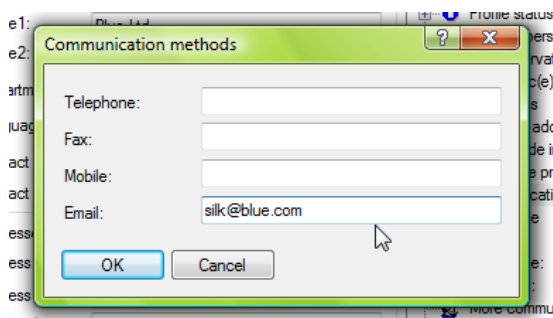
Salut.	Salutation	Title	Type
Mr	Dear Mr		Name
Mrs	Dear Ms.		Name
Mr & Mrs	Dear Mr & Mrs		Name
Dr.	Dear Doctor		Name
Dr. & Mrs	Dear Doctor & Mrs		Name
Dr. & Mr	Dear Doctor & Mr		Name
Prof.	Dear Professor	Prof.	Name
Sir	Dear Sir		Name

Double-click the entry for "Dear Ms. ..." and close the dialog.

Then click "OK" to confirm the contact person's information, and protel adds the data to the company profile.

Now add the e-mail address where you can contact Ms. Silk. To do this, simply click on "Communication methods" in the right-hand section of the dialog to open the "Communication methods" dialog:

Enter contact details



Enter **silk@blue.com** in the "E-mail" line, and click "OK" to confirm.

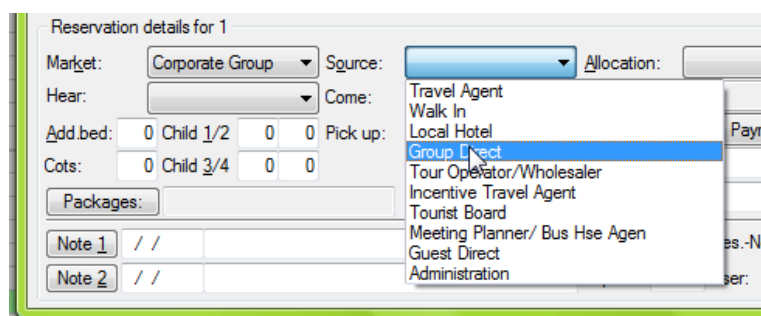
This should be enough for now, so click "OK" to close the company profile and return to the Reservation dialog, where protel has added the contact person's information.

Entering Data for Reservations: Details

The central portion of the window shows you the reservation data.

In the lower portion of the window, You can enter more information about our reservation. We will focus on a few key pieces of information, such as the "Market" and the "Source".

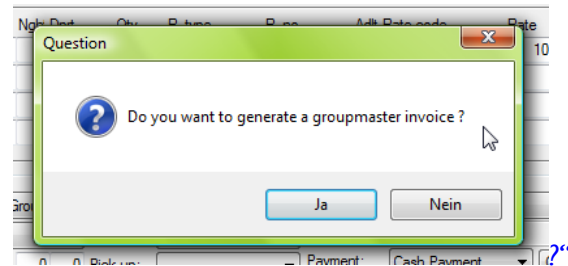
BY THE WAY: Mandatory fields can be configured individually.



Note that here, like in many other areas of protel, each hotel can decide for itself which fields are mandatory and *have* to be completed. Does "your" protel not agree with your entries? Then simply complete all required entries.

To finish, click "OK" to confirm the entries and close out the reservation.

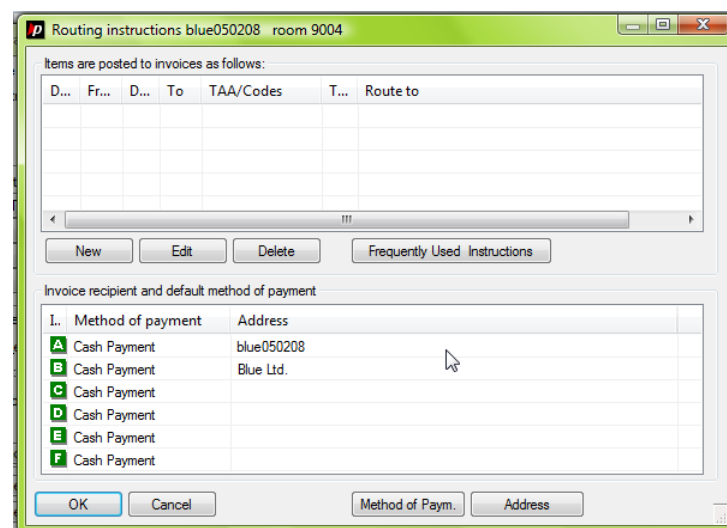
Query: Generate a Group Master Invoice?



Now, protel asks whether we want to bill all the revenues in this reservation to a single, shared account:

Well, since Blue Ltd. is paying for its employees expenses you want everything to be billed to one account, and so you click [Yes] / [Ja].

protel then creates one account for the group master in addition to the accounts it creates for each individual group member. It then opens the "Routing Instructions" dialog.



You can use the "Routing Instructions" dialog to manage your group's revenues.

By the way: If you had clicked [No] / [Nein], you could still edit the group's reservations together, but you could NOT manage the group's revenues centrally. In that case, protel would issue individual invoices for each of the **four** members of the group.

Creating Group Invoices: Basics

In the "Routing Instructions" dialog, you decide *what* revenues are billed to *which* account for *which* guest, and *when* or *for how long* these instructions will apply.

The routing instruction you enter for the group master will be applied to the individual reservations linked by the master. You will see how to customize this "inheritance" process later on. Of course, you can also change the routing instructions for each individual reservation afterward.

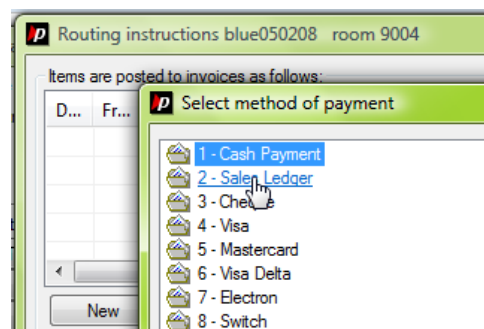
So how does this work? As you can see, protel shows you a list of invoices from A to F in the bottom portion of the window. In the case of the group reservation, invoice A is assigned to the group master by default, as invoice B is assigned to Blue Ltd. In a moment, you will be transferring your group's revenues to this recipient.

Select Method of Payment

First, you quickly change the method of payment.

Ms. Silk has already told us that the company is not paying cash for the rooms but wants to be billed later. So you select the invoice B (the company's invoice), click the [Method of Payment] button to open the "Select Method of Payment" dialog

...



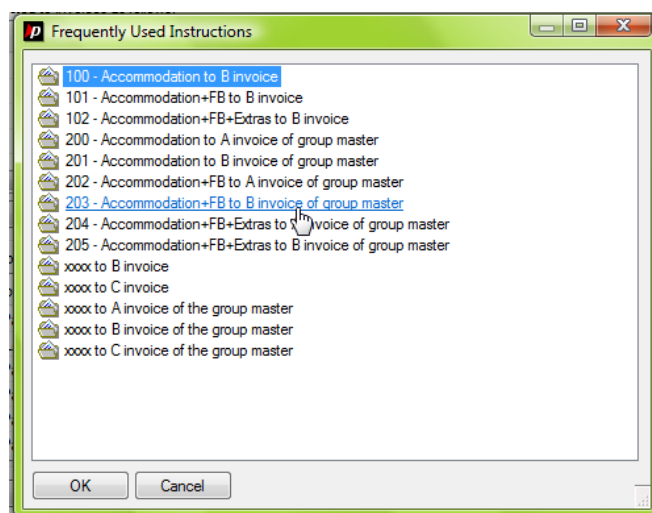
... select "2 - Sales Ledger", and click [OK] to confirm.

Selecting Routing Instructions

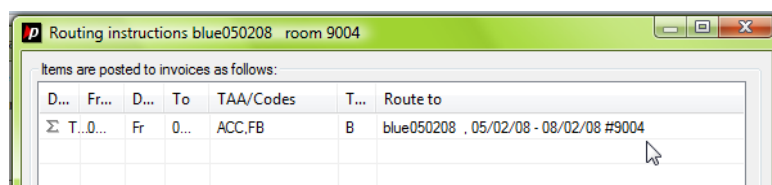
How do you manage your guests' accounts? It all depends on what your customer wants! Blue Ltd. is generous – not only is it paying for the accommodation, but it is also paying for food and beverages. It is not, however, paying for the extras that our trainees buy while staying at your hotel. This scenario is fairly common, which is why it is also included in the "Frequently Used Instructions" list.

To open this list, click the [Frequently Used Instructions] button:

BY THE WAY: You can also set up your own customized routing instructions. However, this would go beyond the scope of this tutorial.



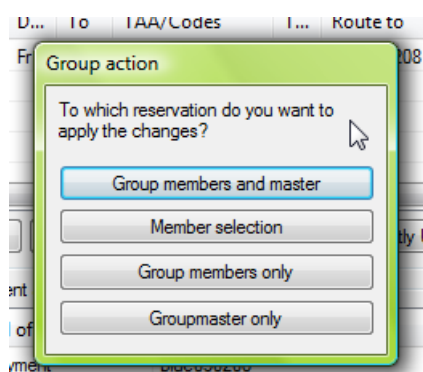
With your mouse, select "203 - Accommodation+FB to B invoice of group master" and protel will show the selected routing instruction in the upper portion of the window:



Click [OK] to confirm your selection.

Applying Routing Instructions

In this dialog, you decide who to include in a particular action – i.e., the execution of the selected routing instruction:



In this case (as in most cases), you will click the button to select "Group members and master". Why?

protel will then apply the selected routing instruction to each guest account *and* the group master account:

- All "accommodation and F&B" revenues are billed to Invoice B, while *everything else* is billed to Invoice A.
- All the revenues originally billed to the B invoices of each individual group member will be transferred to the group master's B invoice. And *that* means these revenues will be billed to the company.
- Likewise, all the revenues that are not for "accommodation and F&B" will remain on the individual guests' accounts and will appear on their personal invoices.

Thus, click the button to select "Group members and master".

This was the final step in setting up your group reservation.

Partings and Reunions

We hope this tutorial showed you how protel works. On our website you'll find more in-depth instructions for beginners and advanced users.

Join us the other part of our tutorial series on group reservations to learn how to use a joint account to administer a group's revenues easily and reliably.

We look forward to receiving your comments. Fee free to send any praise and criticism to documentation@protel-net.com

For more tutorials, go to
www.protel-net.com

Comments welcome!