

Oracle® Hospitality Suite8
Conference and Catering Management User Manual
Release 8.9

July 2015

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Preface

Audience

This user manual is intended for system users and system administrators.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

<https://support.oracle.com/>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at

<http://docs.oracle.com>

Revision History

Date	Description of Change
July, 2005	<ul style="list-style-type: none">• 8.5.0.0 - First Issue Small Business Edition
May, 2008	<ul style="list-style-type: none">• 8.7 - Updated for Version 8.7
June, 2008	<ul style="list-style-type: none">• 8.7.3.1 - Updated for Version 8.7.3.1
May, 2009	<ul style="list-style-type: none">• 8.8 - Updates for Version 8.8
Sept, 2010	<ul style="list-style-type: none">• 8.8 - Updates for Oracle 11gR1
Jan, 2012	<ul style="list-style-type: none">• 8.9 - Updated for Version 8.9
Nov, 2012	<ul style="list-style-type: none">• 8.9 - New cover page
July, 2015	<ul style="list-style-type: none">• 8.9 - Oracle template applied

1 Introduction

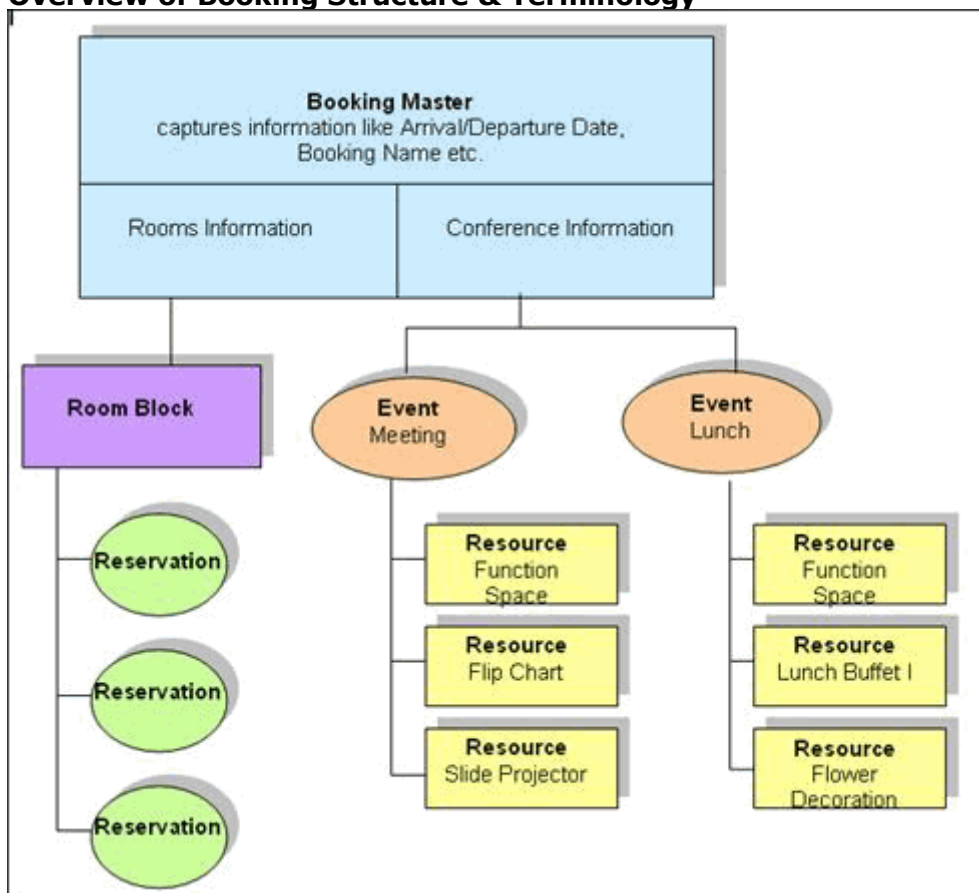
About Suite8 Meeting Planner

The Suite8 Meeting Planner module automates sales and catering top to bottom. It consists of the Conference Diary, which is used to check availability and to work on existing bookings and Event Management, which allows the users to quickly enter events and to manage them in an effective manner.

The system consists of the following options:

- Booking Master
- Conference and Meeting Event Management
- Resource Management
- Direct access to financial accounts and postings

Overview of Booking Structure & Terminology



Logging In

To use Suite8 you must first log into the system. You must have a valid user identification and password.

Logging into Suite8

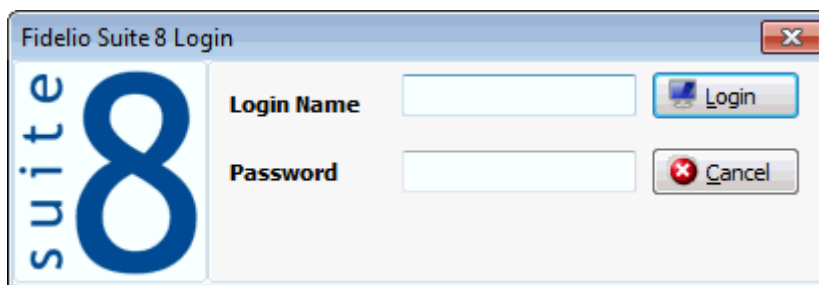
1. From the desktop, click the Fidelio Suite8 icon.



The Suite8 Splash screen is displayed for several seconds with the Payment Application Data Security Standard (PA-DSS) disclaimer



The Fidelio V8 Login screen is then displayed.



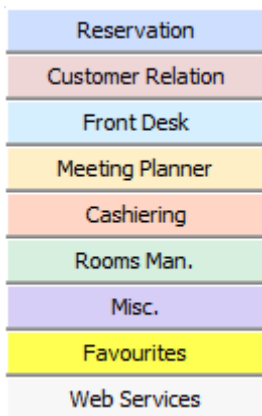
2. Type your user identification (case sensitive) in the Login name box.
3. **Tab** to the Password box.
4. Type your secret password (case sensitive) in the Password box.
5. Click LOGIN, the Suite8 main menu screen appears.

You are now logged into the system.

Note: If one of the following tables: WMLG, WLOG, ZPOS, WDAT, SHIS, SRPD, WRPD has no indices or a missing index, an alert is displayed when starting Suite8 with a message to contact support. It could happen that a table has no indices in the event that a table was renamed for support purpose. Renaming a table carries the indices to the renamed table. If an index is missing of one of the above mentioned tables, the alert is displayed when starting Suite8.

Meeting Planner Shortcut bar

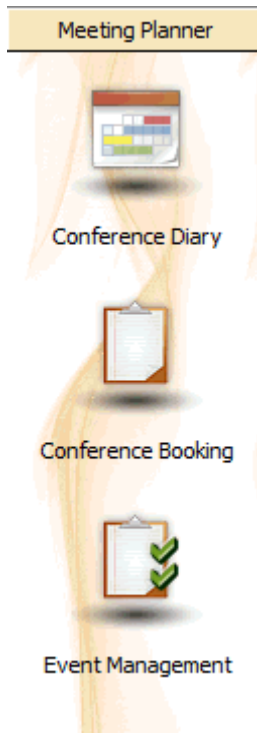
The Suite8 main menu screen has nine coloured tabs located on the left of the screen. Each coloured tab represents one of the main user modules.



To open the Meeting Planner Shortcut Bar

1. Click MEETING PLANNER from the coloured shortcut bar.

The Meeting Planner shortcut bar opens.



2. Alternatively you can click MEETING PLANNER on the menu bar.

The Meeting Planner menu screen appears.

-
- Conference Diary
 - Conference Booking
 - Event Management
 - Maintenance

Navigation Keys

Accelerator keys

Accelerator keys are used for fast access to a box on a screen or dialog box. When a letter is underlined you can press the **Alt + letter** keys and the cursor moves into the appropriate box. For example, on the Profile Search screen the letter “A” is underlined in the Name box. By pressing the **Alt + A** keys, the cursor moves into the Name box.

To use the accelerator keys:

From the screen or dialog box, press **Alt + letter** to move the cursor into the appropriate box.

Shortcut keys

Suite8 has shortcut keys that allow you to perform actions directly from the keyboard without having to use the mouse. Using these keys saves you time.

Suite8 Shortcut keys

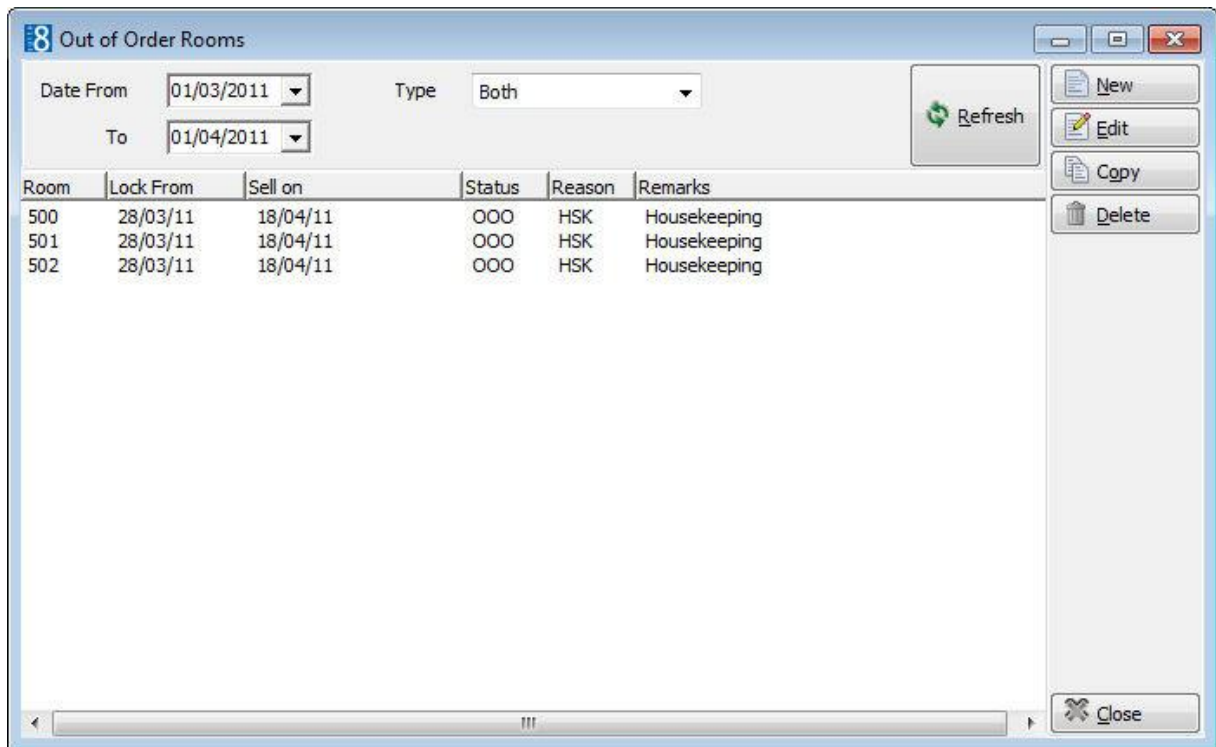
Shortcut Key	Description
F1	Displays the help.
Alt + F4	Closes the active window.
F10	Closes all active windows.
F12	Moves the cursor from a data box to the first record on the grid.
Alt + Down arrow	Displays a combo box.
Tab	Moves forward through the boxes/options. Moves to the next box and confirms the entry.
Shift + Tab	Moves backward through the boxes/options.
Ctrl + Tab	Moves forward through tabs.
Ctrl + Shift + Tab	Moves backward through tabs.
Escape	Cancels the current action. Removes a Combo box before a selection has been made.
Home	Moves the cursor to the beginning of a box.
End	Moves the cursor to the end of a box.

Using the blue drill down arrow

Many boxes have a blue drill down arrow  next them indicating that there is additional information that can be displayed.

Housekeeping			
	Total	Occupied	Vacant
Clean Rooms	57	1	56
Dirty Rooms	80	17	63
Total		18	119
Out of Order	0	0	0
Out of Service	0	0	0
Rooms in Queue			0

For example, on the House Status screen clicking the blue drill down arrow on the Out of Order line displays the Out of Order Rooms screen.

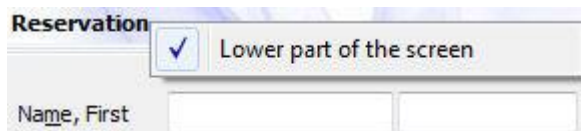


HTML View

Suite8 offers the possibility to view information in HTML format. HTML is the abbreviation for "Hypertext Markup Language." This is the system of marking a document so it can be published on the World Wide Web and viewed with a browser. The main areas where information can be viewed in HTML format are as follows:

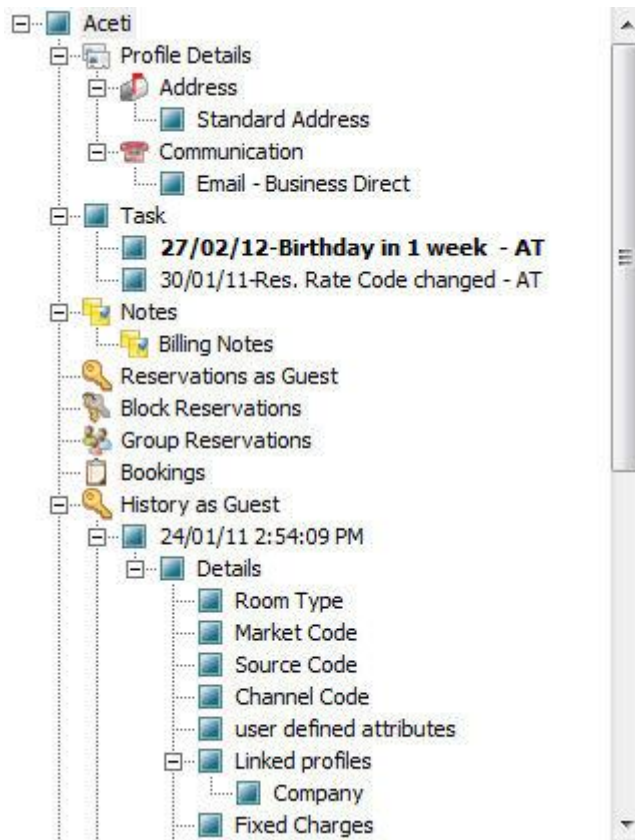
- Reservation Navigator
- Blocks
- Profiles
- Cashiering
- Tasks and Activities
- Events
- Conference Reservation

The HTML display on the reservation navigator can be hidden so that the reservation grid is expanded. Double-click in the blue reservation header bar or right-click and select/deselect LOWER PART OF THE SCREEN from the short-cut menu to view or hide the HTML display. This setting is stored per user and remains until the next time it is changed.



Expand the HTML tree

- Click the expand icon  to show all available folders.



Collapse the HTML tree

- Click the collapse icon  to collapse all folders to the uppermost level.



Refresh the HTML View

- Click the refresh icon .

View information in HTML format

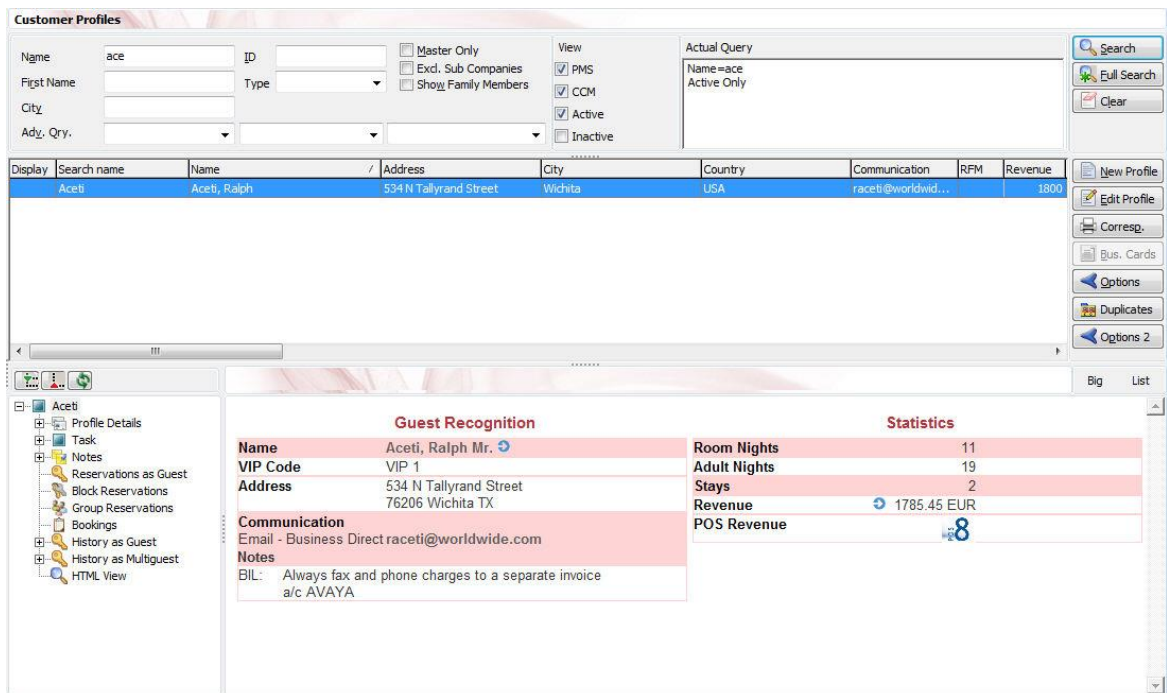
In this example we will display information in HTML format on the profile screen.

- Click the CUSTOMER RELATION menu and select PROFILES to display the customer profile screen.

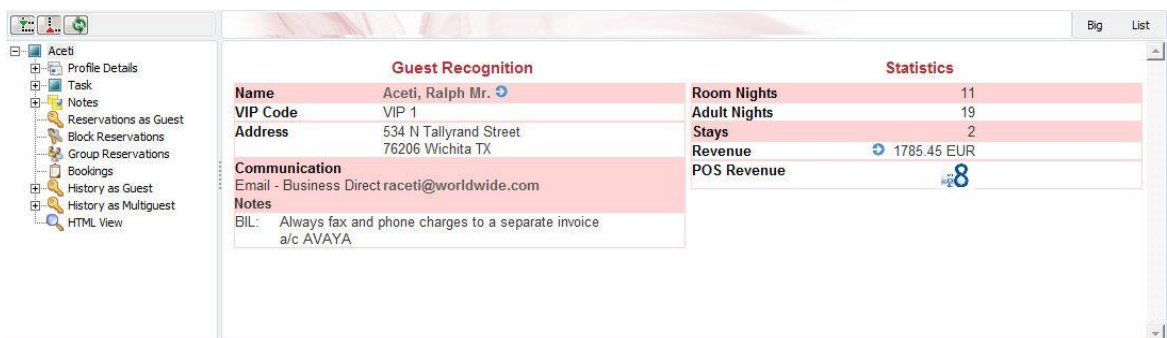
This main customer profile screen is called the Navigator and is divided into 3 distinct areas:

- Query - basic and advance profile search criteria
- Query Results - the results of the query shown in a grid format
- Tree Listing and HTML Page
 - A tree listing of all the details associated with this profile including address, communications, links, reservations or history
 - A freely definable HTML display which by default has a 'big' format where the details are displayed in a non-grid style format or a list format. The HTML display can be printed by using the right mouse click.

2. Enter the name to search for in the NAME box and click SEARCH.




3. The query results are shown in grid format in the middle section of the screen and the tree and HTML formats are shown in the lower section of the screen.



4. In this instance the HTML view displays a summary of the profile details. The tree listing is displayed by default expanded by one level. A plus sign next to a folder indicates that it can be expanded to show more folders; a minus sign indicates that it can be collapsed.

Change the display of the HTML

Two additional buttons on the html display allow you to change whether certain details are displayed in a non-grid style or in a list format. By default the 'big' view is displayed.

1. To view in list format click the  button.


Arrival	Departure	Nights	Customer	Arrival day	Departure day	No of Rooms	Room type	Room	Market	Rate Code
20/04/11	22/04/11	2	Aceti Ralph	20/04/11	22/04/11	1	Double Room		Individual	
30/03/11	31/03/11	1	Aceti Ralph	30/03/11	31/03/11	1	Double Room	109 Double Room	Individual	

2. To view in a non-grid style, click the  button.

20/04/11 Departure: 22/04/11 Nights: 2 Customer: Aceti Ralph Arrival day: 20/04/11 Departure day: 22/04/11 No of Rooms: 1 Room type: Double Room Room: Market: Individual Rate Code:	30/03/11 Departure: 31/03/11 Nights: 1 Customer: Aceti Ralph Arrival day: 30/03/11 Departure day: 31/03/11 No of Rooms: 1 Room type: Double Room Room: 109 Double Room Market: Individual Rate Code:
---	---

Copy to clipboard

It is possible to copy information from the HTML files to clipboard by selecting items from HTML, using right mouse short cut menu and selecting COPY TO CLIPBOARD or short cut key CTRL + C. This information can then be pasted to any open file by using right mouse menu option PASTE or short cut key CTRL + V.

 The menu option COPY TO CLIPBOARD is controlled by the user right COPY TO CLIPBOARD FROM HTML under Users → User Definition → Rights → Miscellaneous

The Quick Keys

Suite8 allows you to select the Quick Keys main menu from any screen. The quick keys are shortcuts to screens, searches, and desktop tools. Using these keys allows rapid access to information without having to leave the section that you are currently working on. For example, a customer is making a new reservation while at the same time asking questions about restaurants in the area. You can use the Telephone Book quick key for restaurant information instead of aborting the new reservation screen, looking up the restaurant information, closing the Telephone Book, and reopening the new reservation screen.

To access the Quick Keys main menu

- Click the QUICK KEYS menu option.

The Quick Keys menu is displayed.

Arrivals	Ctrl+A
Availability	Ctrl+D
Billing	Ctrl+B
Calendar	F4
Conference Diary	F3
Conference Floor Plan	Shift+Alt+F3
Currency Calculator	Shift+Alt+R
Event Vacancies	Ctrl+Shift+F3
Event Waitlist Priority	Ctrl+W
Floor Plan	Ctrl+F
Goals	Ctrl+Shift+G
Group Reservation	Ctrl+G
Hotel Segment Statistics	Ctrl+Shift+S
House Status	Ctrl+H
Inhouse Guests	Ctrl+I
Interface Functions	Shift+F8
Logbook	Shift+Alt+L
Maximum Availability	Ctrl+Shift+M
Messages	Ctrl+M
New Reservation	Ctrl+N
Postings	Ctrl+E
Profiles	Ctrl+P
Quick Reservation	Ctrl+Q
Rate Query	Ctrl+R
Reports	Ctrl+Shift+R
Room Rack	Ctrl+L
Room Search	Ctrl+S
Room Type Availability	Ctrl+Shift+D
Space Occupancy	Ctrl+F3
Table Reservation	Ctrl+Shift+A
Telephone Book	Ctrl+T
Update Reservation	Ctrl+U

The Date Box

The format of the dates and the separators between the dates may vary from one hotel to another. The date format is defined in the Control Panel Windows Regional Settings/Options.

Typical date formats include the following:

- dd/yy
- MM/dd/yyyy
- yy/MM/dd
- yyyy-MM-dd
- dd-MMM-YY

You can type the date directly in the date box; however it must be typed exactly as per the pre-defined format.

There are many date boxes in the system, for example, Arrival Date or From Date. The date can be either a specific date or an as of date.

Arrival date From:

A specific date is when you need to see what happened on that day. For example, you need to see which guests have departed 01/01/03.

An 'as of date' is when you need to find out information starting from that date. For example, you need to read the room rack starting from 09/09/03 through 12/09/03.

Changing the date

The date can be changed by typing a new date or with the use of the calendar.

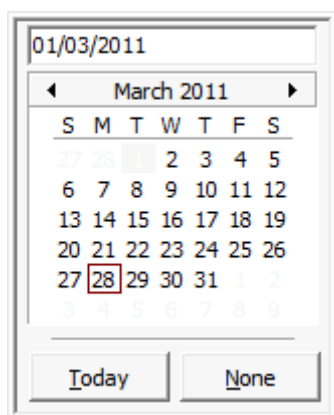
To type a new date

1. Place the cursor in the Date box.
2. Type the new date in the Date box, in the defined format including separators.
3. Press the **Tab** key, the date is changed.

To change a date using the calendar

1. Click the drop down arrow  next to the Date box.

The calendar appears.



2. Change the month to a previous month or future month by clicking the horizontal arrows located on the top of the calendar or by pressing the **Ctrl + Page Up** or **Ctrl + Page Down** key.
3. Place the cursor on the date and click the left mouse button **or** move the keyboard arrow keys to locate the date and press **Enter**, the date is changed.

Customising the HTML display

The HTML display may be customised according to the requirements of the property.

The customization options available when placing the cursor on the HTML display and right-clicking are:

- **PRINT** - prints an exact copy of the HTML display. The print page margins and the actions to take if the HTML printout is too large for the defined paper size can be defined in the configuration.
- **PRINT WITH SETUP** - displays the printer options and then print the HTML display.
- **VIEW SOURCE** - displays the HTML code; no changes can be made.
- **EDIT TEMPLATE WITH NOTEPAD** - opens the relevant *.htm and *.qry in notepad. Users with HTML programming knowledge can edit these files to meet the requirements of the property.
- **EDIT TEMPLATE WITH ASSOCIATED APPLICATION** - opens the relevant *.htm and *.qry with the program associated with these file types. Users with HTML programming knowledge can edit these files to meet the requirements of the property.

How to use HTML Expressions to customize the HTML display

Properties can configure and store customised html files in the Version 8 directory for htm files. The files are displayed in Suite8 either by logged in user, user language, customised htm files for all users or language specific htm files for all users.

The priority Suite8 uses to determine which file to use is in the sequence as listed:

- Customised htm file by user initials

To display a customised htm file by user initials, the htm file has to be called `USR_USERINITIALS_HTMLFILENAME.HTM`.

Example: For a user with the initials DS the file has to be called `usr_ds_quickinfo.htm`.

- Customised htm file by user language

To display a customised htm file by user language, the htm file has to be called `CUST_LANG_LANGUAGE SHORT DESCRIPTION_QUICKINFO.HTM`.

Example: If the language short description is F for French, the user has to select this language under User Settings → Startup → Language and the file, such as `quickinfo.htm` has to be called `cust_lang_f_quickinfo.htm`.

- Customised version for all users

To display a customised version of htm files for all users, the html files have to be called `CUST_HTMLFILENAME.HTM`.

Example: `cust_quickinfo.htm`.

- Customised version by language

To display a customised version by language, the html files have to be called `LANG_SHORT DESCRIPTION OF THE LANGUAGE_HTMLFILE.HTM`.


Example: `lang_f_quickinfo.htm`, where f stands for the short description of the language.


If none of these files can be found then the standard htm file is displayed

How to hide or show expressions depending on activated features or license

The following expression can be used to hide for example, Conference Information on the HTML file when working with the small business edition:

```
if ({const isBnB})=(1)}{/if}{else} {if {feature Meeting Planner}} Conference  
{runquery 2}
```

 Customization functionality is controlled by the user right HTML source view and edit under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

 The print page margins and the actions to take if the HTML printout is too large for the defined paper size are defined via the option HTML PRINTOUT under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4.

Customising Suite8 Grids

Many of the grids in Suite8 may be customised according to the needs of the property.

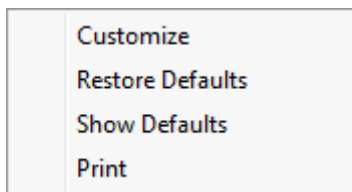
The customization options available are:

- CUSTOMIZE - opens the customize dialog box so that columns on the grid can be added, changed or removed.
- RESTORE DEFAULTS - applies the default settings for this grid.
- SHOW DEFAULTS - applies the default settings to the current grid view, however, any customised settings are used the next time the grid is displayed.
- Select PRINT to print or export the existing grid layout, the possible export formats are ASCII File, CSV Format, HTML Document or an Excel Document.

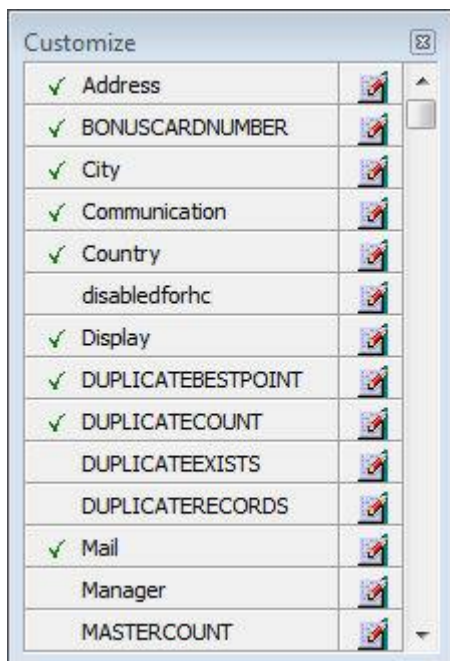
Note: The print or export function should be used before changes to the grid will be saved.

How to customize a grid


1. Place the cursor in the grid and right-click to display the short-cut menu.



2. Select CUSTOMIZE to open the customize screen.



The fields already used are marked with a green check mark.

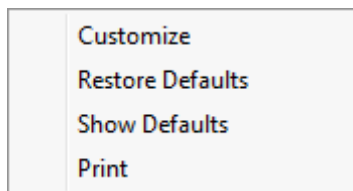
3. Click the PENCIL button to view or change the column properties.
4. To move a field to the grid, select the field and drag it to the required position.
5. Click the  in the top right-hand corner to close the customize screen.
6. A message is displayed asking if you want to store the grid layout.




7. Select YES to save the changes or No not to save any changes.

How to remove a column from a customized grid

1. Place the cursor in the grid and right-click to display the short-cut menu.




2. Select CUSTOMIZE to open the customize screen.
The fields already used are marked with a green check mark.
3. On the grid point to the column to be removed and drag it to the customize screen; yellow arrows are displayed at each end of the column name.
Once the column has been removed the green check mark is removed from the field name on the customize screen.
4. Click the  in the top right-hand corner to close the customize screen.
5. A message is displayed asking if you want to store the grid layout.
6. Select YES to save the changes or No not to save any changes.

Column Properties

Field	Description
Field name	The field name as it is defined in the database table.
Caption	The field caption.
Fixed	Defines if the column will be fixed to the left side, when scrolling to the right to view additional fields of the grid. Columns marked as fixed are highlighted grey.

How to create a customised grid view for profile search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the profile search.

-  This functionality is controlled by the parameter CUSTOM VIEW IN PROFILE SEARCH under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_SYS_CUSTOMXCMSSEARCH has to be amended.

Example: "Adding the financial account long description to the profile navigator"


The view has to be changed as follows:

```
CREATE OR REPLACE FORCE VIEW v8_sys_customxcmssearch
(customxcmssearch_xcms_id, zfac_longdesc)
AS SELECT xcms_id customxcmssearch_xcms_id,
(select zfac_longdesc from zfac where zfac_actvalidfrom is not null and
zfac_actvaliduntil is null and xcms.xcms_id=zfac.zfac_xcms_id and rownum=1)
zfac_longdesc
from xcms;
```

The fields from the custom view are automatically added to the grid.

How to create a customised grid view for reservation search


Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the reservation navigator.

-  This functionality is controlled by the parameter CUSTOM VIEW IN RES. NAVIGATOR under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_SYS_CUSTOMXCMSSEARCH has to be amended.

Example: "Adding the housekeeping status to the reservation navigator"

How to create a customised grid view for booking search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the event booking search.

-  This functionality is controlled by the parameter CUSTOM VIEW IN BOOKING SEARCH under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_SYS_CUSTOMYBOMSEARCH has to be amended, however it must contain the field customybomsearch_ybom_id.

Example: "How to display the function type description"

The view has to be changed as follows:

```
CREATE OR REPLACE FORCE VIEW V8_SYS_CUSTOMYBOMSEARCH
AS
SELECT
ybom_id customybomsearch_ybom_id,
```

yfty_longdesc

from

ybom, yfty

where

ybom_yfty_id=yfty_id(+);



Customization functionality is controlled by the user right EDIT under Setup → Configuration → Users → User Definition → Rights → Miscellaneous → Grid layout Customization.



Print functionality is controlled by the user right PRINT GRID under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

Favourites

The Favourites shortcut toolbar allows you to keep your most frequently used options right where you can find them. Your most used options can be added to the Favourites shortcut toolbar where they are more noticeable and more easily organized to suit your purposes.

To make the most of the Favourites shortcut toolbar, you need to organize the options in it; this can be done using drag and drop.

In user settings the Favourites shortcut toolbar can be set to be listed first and will then be the default shortcut toolbar opened when logging on to Fidelio.

Note: The Favourites shortcut toolbar cannot be removed from the toolbar.

How to add an option to the Favourites shortcut bar

1. Click one of the coloured shortcut toolbars on the left to list the options on that toolbar.
2. Right-click the option that you want to add, and then click ADD TO FAVOURITES on the shortcut menu.

The option is now listed on the Favourites shortcut toolbar.

3. Repeat Steps 1 and 2 for each option that you want to add.

Note: Options from Web Services cannot be added to the Favourites shortcut toolbar.

How to delete an option from the Favourites shortcut bar

1. Click the FAVOURITES shortcut toolbar on the left to list the options.
2. Right-click the option that you want to remove, and then click DELETE BUTTON on the shortcut menu.

The option is removed from the Favourites shortcut toolbar.

3. Repeat Steps 1 and 2 for each option that you want to remove.

How to reorganise the options on the Favourites shortcut bar

1. Click the FAVOURITES shortcut toolbar on the left to list the options.
2. Select the option to be moved and then left-click and hold the mouse button while you drag the option to its new location on the toolbar.
3. Repeat Steps 1 and 2 for each option that you want to move.



On the toolbar the Favourites shortcut bar can be listed first by selecting the option FAVOURITE BUTTONS ON TOP under Miscellaneous → User Settings → Appearance Tab.

2 Conference Diary

Viewing the Conference Diary

The conference diary is a graphical display of all the function spaces. It enables users to easily view the availability of function spaces and to start the booking process. In addition to creating new bookings, details of existing bookings and events can be viewed and changed, and calendar events and PMS availability are displayed.

Note: Calendar events with the type conference bookings are not displayed in the conference diary.

How to view the conference diary

Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.

The Conference Diary is displayed.

The user can scroll up and down within the conference diary by rotating the wheel of the mouse.

The screenshot displays the Conference Diary for Tuesday, 01 November 2011. The interface includes a calendar navigation tool at the top left, a search and filter panel on the right, and a main grid showing bookings for various function spaces. The function spaces listed on the left include Ball I, Ballroom I + II, Ball II, CS100, CS101, CS102, Foyer, Restaurant, Room I, Room II, Room III, and Winter Garden. The bookings are displayed as horizontal bars across the time slots, with colors indicating different types of events. The interface also features a 'Caption' section at the bottom with options like 'Booking Name', 'OPT', 'TEN', 'DEF', 'WAIT', and 'WEB', along with checkboxes for 'HTML' and 'Hide Search'.







The layout of the diary can be changed by activating the parameter DISPLAY FUNCTION SPACE FOR EACH BOOKING. Bookings entered in the same function space are then listed on a separate line; however events of the same booking are displayed in a single line. Bookings entered into shareable function spaces are also displayed on individual lines.

The screenshot displays the Conference Diary for Sunday, 06 November 2011. The interface is similar to the previous one, showing a calendar grid with bookings for various function spaces. The function spaces listed on the left include Ball I, Ballroom I + II, Ball II, CS100, CS101, CS102, Foyer, Restaurant, Room I, Room II, Room III, and Winter Garden. The bookings are displayed as horizontal bars across the time slots, with colors indicating different types of events. The interface also features a 'Caption' section at the bottom with options like 'Booking Name', 'OPT', 'TEN', 'DEF', 'WAIT', and 'WEB', along with checkboxes for 'HTML' and 'Hide Search'.

Note: Placing the cursor on a booking displays a hint box with the following details if available:

The Company Name, Contact, Booking Dates, Decision Date, Follow Up Date, Cutoff Date, Event Type, Dates, Time, Status, Number of Persons, Seating arrangement and the Rate.

Note: Opening the diary via F3 from the Booking Master edit screen opens the diary on the arrival date of the booking. Pressing F3 on the event details or event edit screen the diary will be opened on the selected day; otherwise the default is to open the diary on the current date.


-  The default start time for the conference diary is defined via the option CONFERENCE DIARY START TIME under Setup → Configuration → Global Settings → CCM → Conference 1 tab.
-  The default number of days to be displayed on the conference diary is defined via the option DEFAULT LOADED DAYS FOR DIARY under Setup → Configuration → Global Settings → CCM → Conference 1 tab. It is recommended to set the default number of days to two.
-  The type of availability displayed in the Date column is defined via the option DISPLAY AVAILABILITY IN ROOM RACK under Miscellaneous → User Settings → Appearance Tab. Types of availability available are Maximum Availability, Minimum Availability, Def. Occupied and Def. + Tent. Occupied.
-  Linking a view type to a login so that the preferred view is automatically used when the user calls the conference diary is defined via the option FUNCTION SPACE VIEW TYPE IN DIARY under Miscellaneous → User Settings → Appearance Tab.
-  Linking a custom order to a login so that the preferred custom order is automatically used when the user calls the conference diary is defined via the option FUNCTION SPACE ORDER IN DIARY under Miscellaneous → User Settings → Appearance Tab.
-  Bookings entered in the same function space can be listed in a separate line by activating the parameter DISPLAY FUNCTION SPACE FOR EACH BOOKING under Setup → Configuration → Global Settings → CCM → Conference 1 tab.
-  The event type can be displayed before the name by activating the parameter DISPLAY EVENT TYPE FIRST IN CONFERENCE DIARY under Setup → Configuration → Global Settings → CCM → Conference 1 tab.
-  Events with the status non-deduct inventory using combined rooms are displayed with an indicator on the conference diary by activating the parameter DISPLAY DOUBLE OCCUPANCY IN CONFERENCE DIARY under Setup → Configuration → Global Settings → CCM → Conference 1 tab. If the parameter is not activated then no indicator is shown on these events.


Understanding the Conference Diary

Conference Diary search criteria



Fill in this field	With this information
Start Time	The start time is used as the start time for showing the availability and occupancy of function spaces. A default start time can be defined in the configuration.
Order By	Can be used to change the order in which the function spaces are displayed on the left hand side, the default is by Name. Standard orders are: by Name, Area, Min. Capacity and Max. Capacity. In addition to the standard orders, an unlimited number of custom orders can be defined. A custom order can also be linked to a login so that the preferred custom order is automatically used when the user calls the conference diary.
View Types	Day View: Allows viewing one or multiple days depending on the zoom settings and the default days in global settings. The columns are displayed in time slots. Week View: Allows viewing one or multiple weeks depending on the zoom settings. The columns are displayed in date slots. Monthly View: Allows viewing a single day or a full month depending on the zoom settings. The columns are displayed in date slots.
View By	Used to change the view time slots, i.e. 30 minutes, 1 hour or 4 hour slots. This can be used in connection with the Day View.
Zoom Horizontal	Used to change the zoom settings horizontally of the time/date slots, to expand the view for example. The zoom settings are stored per user. After an upgrade or if using them for the first time, the zoom settings can be by default set to the minimum, but once changed they will be the same every time the user logs on.
Zoom Vertical	Used to change the zoom settings vertically, i.e. enlarge the function space names on the left hand side.
Space Type	One of the pre-defined space types can be selected for filtering. Once a space type has been selected, click SEARCH to display only function spaces of the selected space type.
Space Name	From the drop down list select one of the function space names and click SEARCH to display only the selected function space.
Seating	Select one of the seating arrangements from the list and click SEARCH to display only those function spaces that are defined with the selected seating arrangement. This option can be used in connection with minimum capacity in order to find a suitable room.
Min. Capacity	May be used to search for function spaces that have the minimum capacity entered. Only those function spaces that are defined with the minimum capacity, for example 10 or larger will be displayed. The minimum capacity is taken from the function space configuration screen and does not consider seating arrangement.








Min. Area	May be used to search for function spaces that have the minimum area defined. Only those function spaces that equal or have more than the entered area will be displayed. The area is taken from the function space configuration screen.
All/Availability	Determines whether all function spaces or just the available ones should be displayed. If the 'Availability' option is selected, a time from/to screen will be displayed. Enter the time (from/to) an available function space should be searched for. This option can be used in connection with any other filter.
Individual	If selected, only individual rooms will be shown, for example room A.
Combination	If selected, only combination rooms will be shown, for example rooms A/B.
Shareable	If selected, shareable function spaces will be shown
Seldom	Seldom - only function spaces that have been defined as not to SHOW IN DIARY will be displayed. By default individual, combination and shareable are selected and are displayed unless defined otherwise
Caption	This option is displayed on the lower left-hand corner of the screen. The two options currently available are BOOKING NAME and COMPANY/CONTACT. The caption is applied to the event bar so that it either shows the booking name or the company/contact name.
Hide HTML	In order to hide the HTML panel, select the check box HIDE HTML in the lower left-hand corner of the screen. Note: The selection is stored per user and is automatically selected each time the screen is opened
Hide Search	In order to hide the search criteria panel and display more function spaces, select the check box HIDE SEARCH in the lower left-hand corner of the screen.

 In addition to the standard orders, an unlimited number of custom orders can be defined via the option CUSTOM ORDERS under Setup → Configuration → Conference Management → Function Spaces.

 When selecting the function space type SELDOM only function spaces that have been defined as not to SHOW IN DIARY under Setup → Configuration → Conference Management → Function Spaces → Function Space Definition will be displayed.

Conference Diary screen icons

Icon	Legend Term	What it represents
	Noisy	Indicates that this event is a noisy one, such as a dinner party with live music.
	Do not move	Indicates that this event should not be moved from this function space.
M	Master Event	Indicates that this event is a master-event.
S	Sub-Event	Indicates that this event is a sub-event.

	Shared Function Space	The black triangle indicates that this event is in a shared function space. Note: Only displayed if the parameter DISPLAY FUNCTION SPACE FOR EACH BOOKING is active.
	Set up time	Indicates the set up time for this event.
	Set down time	Indicates the set down time for this event.
	Shareable	Indicates that this function space is shareable.
	Combination	Indicates that this function space is a combination of two or more individual function spaces. Combination rooms are automatically blocked as soon as one of the combination rooms is booked. The name of the company, contact or booking name is shown on the main function space and again within brackets on the combination rooms.
	Shared Function	Indicates that this event is booked as shareable.
	Event Status	Each event status has a defined colour. Events are displayed in the colour according to their event status.
<p>Events are displayed in different colours depending on the event status. However, each booked event displays the Company, contact or booking name, number of persons and the type of event on the coloured bar. Additional icons are displayed as described above and for combination rooms the combination description is also displayed.</p>		

How to search for a function space

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.
The Conference Diary is displayed.
2. Complete the search criteria.
3. Click SEARCH.

The function spaces available according to the entered criteria are displayed.

Note: In order to hide the search criteria panel and display more function spaces, select the check box HIDE SEARCH in the lower left-hand corner of the screen.

How to display function space details

Function space information includes the function space measurements, possible seating arrangements and rates. This information may be displayed from the conference diary in a view only format.

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.
2. Point to the function space name and right-click to display the short-cut menu.
3. Select VIEW DETAILS.

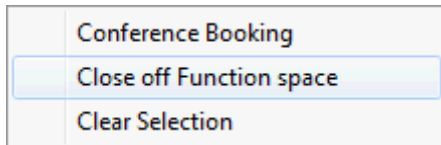
The function space detail screen is displayed in view only format.

Creating a New Booking or Event

Accessing the Booking Master Search screen

How to access the booking master search screen

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.
The Conference Diary is displayed.
2. Place the cursor on the grid box for the function space name, date and time on which the event should start.
3. Left-click and hold down the left-mouse button.
4. Drag the mouse to the right until the required date and time are selected, release the left-mouse button, the short-cut menu is displayed.



5. Select CONFERENCE BOOKING, the booking master search screen is displayed; displayed by default are all bookings within the date range with the same arrival/departure date as the booking/event you are about to create.

Conf. Mgr.	Rms. Mgr.	Arrival Date	Departure Date	Booking Name	Conf. Stat.	Rms. Stat.	Pax	Notes	Company Name
DS	DS	27/10/11	08/11/11	SMW - Sales meeting worldwide 2008	DEF	DEF	480		Schmidt & Partne..
FID		14/10/11	15/12/11	Booking Request	OPT	TEN	12		
DS		10/10/11	10/11/11	POS8 NG	DEF		3		MICROS-Fidelio G..

6. If a new event should be added to an existing booking, select the booking and click the **EVENT** button on the Booking Master search screen.
7. If this new event belongs to a new booking, the new booking can be created via:
 - The **Quick Book** option (See page 33)
 - The **New** Booking Option (See page 36)

Quick Book

The **QUICK BOOK** option can be used to create both the booking and the event at the same time. The quick booking screen is split into two parts; the upper part contains the booking information and lower part the event information. Only the main fields are displayed for the booking, however once the quick booking screen is completed, additional booking information can be entered by editing the booking.

To create a new booking using quick book

1. On the [booking master search screen](#) (See page 32) click the QUICK BOOK button to open the Quick Booking screen. See: [Accessing the Booking Master Search screen](#) (See page 32)

2. Complete the booking screen, for a detailed explanation of the options see the Quick Booking table below.
3. Click OK to save the new booking.

Quick Booking dialog box

Fill in this field	With this information
Company Name	Enter the company name and press tab; if only one company exists with that name it will be filled automatically, otherwise the profile search screen is displayed. Click on the three dots next to the company name field to open customer profile search screen directly and search for the company profile or create a new one.

Contact Name	Enter the contacts last name and press tab; if only one individual exists with that name it will be filled automatically, otherwise the profile search screen is displayed. Click on the three dots next to the contact name field to open the customer profile search screen directly and search for the contact profile or create a new one. Either the company or the contact name has to be filled in for the booking master.
Contact on site	Enter the name of the contact on site if known.
Booking Name	Enter the booking name.
Market Segment	Select the market segment applicable to the booking.
Source	Select a source code that best defines on how the booking was received.
Credit Status	The credit status option is view only and depends on the company/contact profile that was selected. C - for cash-listed. R - for credit status restricted. A - if city ledger status has been approved. Note: Depending on the companies/contacts credit status, a warning message may be displayed, with the option to continue.
Decision Date	Select a date from the calendar, if the customer has to decide by a certain date. This will be completed automatically if a default has been defined in global settings.
Follow up Date	Select a date from the calendar, if the property would like to follow up with the customer, for example the date when the signed contract has to be returned. This will be completed automatically if a default has been defined in global settings.
Event Information	
Event Status	Select the event status.
Event Type	Select the event type.
Event Name	Will be filled in automatically depending on the event type selected, but can be changed.
No of Attendees	Enter the number of attendees for this event.
Min Guarantee	If agreed with the customer, enter the minimum number of guaranteed attendees for this event.
Start Date	The start date of the event is completed as it was already selected via the conference diary.
End Date	The end date of the event is completed as it was already selected via the conference diary.
Start Time	The start time of the event is completed as it was already selected via the conference diary.
End Time	The end time of the event is completed as it was already selected via the conference diary.

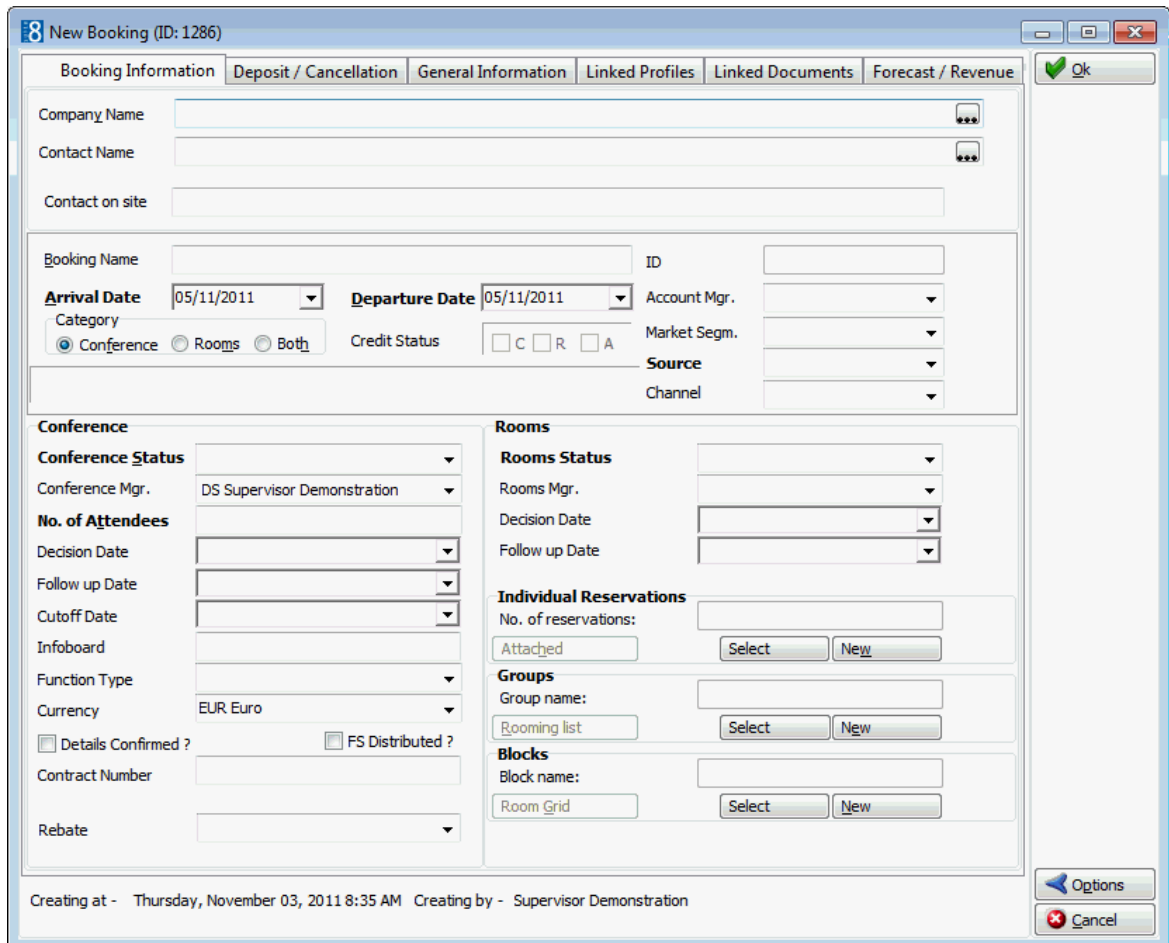
Info Board	Enter the information that should be placed on the info board outside the function space such as Fidelio Software Dealer Conference.
Info Board Profile	This option allows the property to enter a different name to be displayed on the info board. For example, the booking was made by Star Conferences for the company IBM; so on the info board IBM should be displayed. The handling is such that when a company and a contact are entered, the entry in the field Info Board Profile replaces the company, if only a contact is entered, the entry in the Info Board Profile replaces the contact. If no entry is made in the Info Board Profile then the company/contact name from the booking will be displayed.
Noisy	If this event is going to be a noisy one, select this option. Other users can then see in the conference diary that the event is going to be noisy.
Block	This is a view only field and shows the start time and the end time of the event or when a function space is booked the setup time plus event start time and event end time plus set down time. This is completed automatically.
Function Space Information	
Function Space	Filled with the function space selected in the conference diary.
Seating Arr.	Select the seating arrangement. The seating arrangement defined as default will be filled in.
Rate	Select a pre-defined rate or enter a special rate. The rate defined as default will be filled in.
Amount	The rate amount will be completed depending on the selected rate but can be changed.
Dept Code	The department code for room rental.
Special Rate	The check box will be selected automatically as soon as a different amount than that defined for the rate code is entered in the amount field.
Shareable	This option is displayed and selected automatically only if a shareable function space has been selected, but can be changed as required.
Hourly Rate	This option is displayed only if the selected rate is defined as an hourly rate, but can be changed as required.
Setup Time	Filled with the setup time defined for the selected seating arrangement, but can be changed.
Setdown Time	Filled with the set down time defined for the selected seating arrangement, but can be changed.
Don't move	Select this box if the function space should not be moved.

New Booking on the Booking Master Search

When creating a booking via the NEW booking option, first the booking needs to be created and then the booking needs to be selected in order to enter the event, therefore, the times and function space selected on the conference diary are not automatically completed via this option.

To create a new booking using the booking master search

1. On the [booking master search screen](#) (See page 32) click the NEW button.



2. Complete the booking screen; see the Suite8 Conference & Catering Management manual for a detailed explanation of the fields and tabs.
3. Select OPTIONS and then EVENTS to enter a new event, click OK to save the new booking.

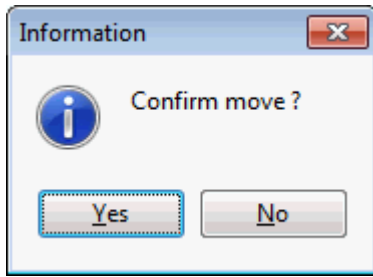
Moving an event to another function space

The easiest way to move an existing event from one function space to another is to drag and drop it via the conference diary. Various messages may be displayed depending on where the event is being moved to.

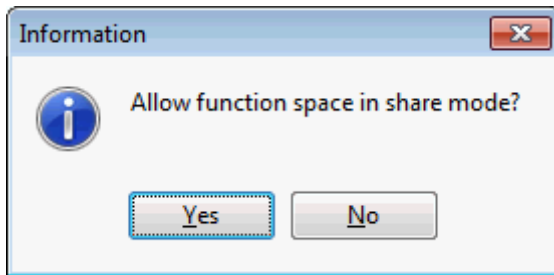
How to move an event

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen.
2. On the Conference Diary screen, select the event to be moved.
3. Left-click and hold the mouse button while you drag the event to the new function space.

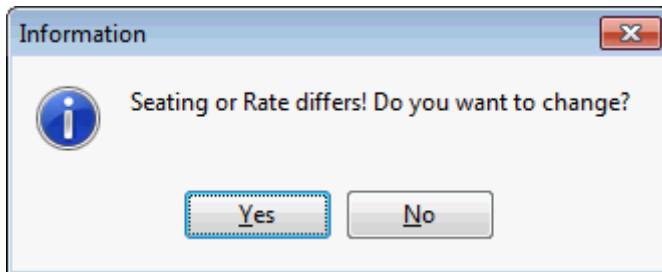
The message "Confirm move?" is displayed.



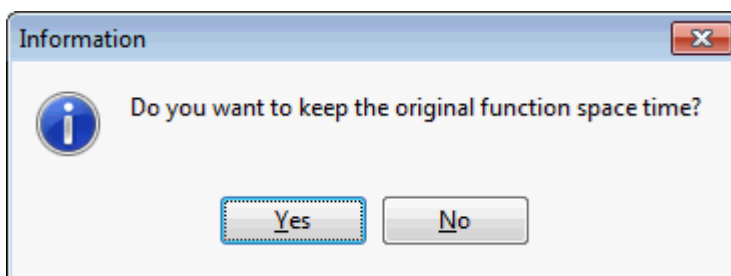
4. Click YES to confirm the event move.
5. If the event is being moved to a shareable function space then the message "Allow function space in share mode?" is displayed.



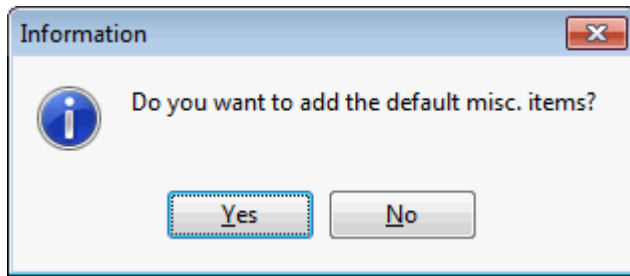
6. Click YES to allow the function space in share mode and No if the function space should not be shared.
7. If the new function space has the same seating and rate it will be updated automatically. If the seating or rate is different in the new function space then the message "Seating or Rate differs! Do you want to change?" is displayed.



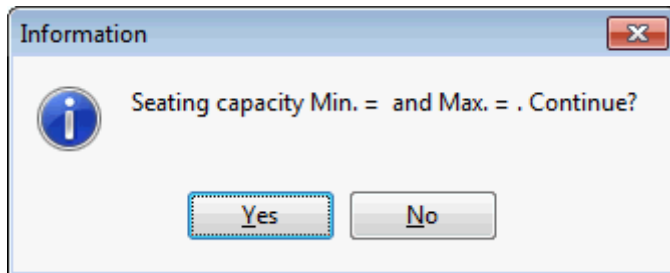
8. If changes need to be made to either the rate or seating arrangements, select YES. If the seating arrangement or rate defined on the original function space is not available on the newly selected function then they will be removed, but the amount will be kept.
9. If the calendar is being viewed in Week or Month view then the message "Do you want to keep the original function space time?" is displayed.



10. Click YES to keep the original function space time.
11. If the new function space has default miscellaneous items defined then the message "Do you want to add the default misc. items?" is displayed.



12. Click YES to add the default misc. items.
13. If the number of pax on the event is not within the minimum and maximum defined for the selected seating arrangement. Then the message "Seating capacity Min. =XX and Max. =XX. Continue?" is displayed.



14. Selecting YES will move the event.
The event is moved on the Conference Diary screen.

Change the Event Start/End Time

You may change an event's start and/or end time, by doing one of the following:

- Change the start/end time by moving the event time on the grid.
- Change the start/end time via the Edit Event screen.

How to change an event start/end time

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen.
2. On the Conference Diary screen, select the event.
3. Right-click to display the short-cut menu, select EDIT EVENT and change the start and/or end time on the Edit Event dialog box.

or

4. Left-click on either the start or end of the event, when the cursor appearance changes hold the mouse button down while you drag the mouse to the left or right or left-click on the event and hold the mouse button while you drag the entire event to the new time spot.

The message "Confirm move?" is displayed.

5. Click YES to confirm the event time change.

Shareable Function Space

Certain function spaces such as the main lobby and restaurant may be configured as SHAREABLE, this allows users to book these function spaces either in share mode or exclusively. Booking a function space in share mode allows multiple groups to be booked into the same function space without double booking or waitlisting events. Booking in exclusive mode only allows one event to be booked into the function space, any others will be waitlisted.

Function Spaces that are defined as SHAREABLE are displayed in green with <S> for shareable on the left hand side of the conference diary. Events which are booked as sharing a function space are displayed with a green trellis.



Foyer <S>

Shareable Function Space - how does it work?

- When only one event is booked into a shareable function space the event status will not be changed to waitlist when the entered no. of attendees exceeds the max. capacity of the function space.
- When more than one event is booked then event status will not be changed to waitlist as long as the total no. of attendees is within the max. capacity of the function space.
- When more than one event is booked the event status of the last event entered will be set to waitlist if the total no. of attendees is more than the max. capacity of the function space.
- If the no. of attendees from other events is reduced so that the total no. of attendees is within the max. capacity then the user will be prompted to change the status of any waitlisted events.

Example:

If we have a shareable function space such as a restaurant with a maximum capacity of 200 pax

- Booking an event with 100 pax - this is within the 200 limit so there is no need to waitlist the event.
- Booking a second event with 20 pax - with both events the total number of pax (120) is within the 200 pax limit so there is no need to waitlist this event.
- Booking a third event with 90 pax - this now takes the total number of pax to 210 which is over the 200 pax limit therefore this event will be waitlisted as the total no. of attendees exceeds the max. capacity of the function space.

However:

- If the no. of attendees of the 1st event is now reduced to 80, the 3rd event will no longer be waitlisted.
- If the no. of attendees of the 2nd event is now increased to 110, then this event will be waitlisted and the 3rd event no longer waitlisted.

How to create an event into a shareable function space

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen or press F3.
2. Point to the function space name, date and time to be booked.
3. Left-click and hold down the left-mouse button.
4. Drag the mouse to the right until the required date and time are selected, release the left-mouse button, the short-cut menu is displayed.
5. Select CONFERENCE BOOKING, the share mode message is displayed.
6. Select YES to book the function space as shareable, this allows other groups to be booked into the same function space. Selecting No will book the function space in exclusive mode which will not allow other groups to be booked into the same function space without waitlisting them.
7. Select QUICK BOOK or NEW to create a new booking or select an existing booking and then the EVENTS button to add a new event to an existing booking.

How to view shareable function space events

To view the list of groups booked into the shareable function space:

1. Highlight the event bar in the conference diary, the hint bar lists the groups that are sharing the function space.
2. Right-click to display the short-cut menu, select VIEW SHARE LIST.

From here, all related information can be accessed.

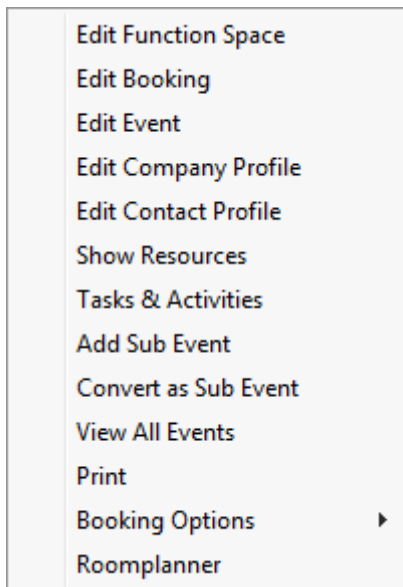
There are a variety of options available from the conference diary/floor plan screen for viewing or changing information that is related to an event or booking.

Displaying the conference diary/floor plan options

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.

The Conference Diary is displayed.

2. On the conference diary screen, highlight an event.
3. Right-click to display the short-cut menu, the pop-up menu appears displaying the following options:



Edit Function Space

Via this option any details related to the booked function space can be viewed or changed such as the rate, seating arrangement or don't move flag.

1. Select EDIT FUNCTION SPACE from the short-cut menu.

The Edit Function Space dialog box is displayed.

The screenshot shows a dialog box titled "8 Edit Ballroom I + II for event Meeting 4 - 03/11/11 11:00 AM (Booking I...". The fields are as follows:

- Name:** Ballroom I + II
- Seating Arr.:** Classroom Style
- Start Date:** 03/11/2011
- End Date:** 03/11/2011
- Start Time:** 11:00 AM
- End Time:** 7:00 PM
- Setup Time:** 45
- Setdown Time:** 15
- Rate:** FUL full day
- Don't Move
- Dept. Code:** 323 Banquet Misc.
- Special Rate
- Ind. in Package
- Orig. Amount:** 2250.00
- Rebate:** % Flat
- Cost Price:** [Empty field]
- Amount:** 2250.00
- Alternative
- Resource Attributes:** [Empty field]

Buttons: OK (green checkmark), Cancel (red X).

2. Make any necessary changes, and then click OK to save the changes.

Note: The start and end time must be within the start and end time of the event.

Edit Booking

Via this option any details related to the booking can be viewed or changed such as the company, the decision date or market segment.

1. Select EDIT BOOKING from the short-cut menu.

The Edit Booking Master screen is displayed.

2. Make any necessary changes, and then click OK to save the changes.

Edit Event

Via this option any details related to the event and function space can be viewed or changed such as the no. of attendees, the info board, the rate or the seating arrangement.

1. Select EDIT EVENT from the short-cut menu.

The Edit Event screen is displayed.

8 Edit Event Meeting 4 - 03/11/11 11:00 AM (Booking ID: 1206)

Event

Company Name Schmidt & Partner GmbH
 Contact Name Schmidt, F. P. H.
 Contact on site
 Booking Name SMW - Sales meeting worldwide 2008

Event Information

Event Status DEF Definitve
 Event Type MET Meeting
 Event Name Meeting 4
 No. of Attendees 480 Min. Guarantee
 Start Date 03/11/2011 End Date 03/11/2011
 Start Time 11:00 AM End Time 7:00 PM
 Alternative

Info Board
 Info Board Profile
 Incl. in Package
 Noisy
 Block 03/11/11 10:15 AM - 7:15 PM

Function Space Information

Function Space Ballroom I + II
 Seating Arr. Classroom Style
 Rate FUL full day Amount 2250.00
 Dept. Code 323 Banquet Misc.
 Rebate % Flat
 Special Rate Don't Move Incl. in Package
 Orig. Amount 2250.00 Cost Price
 Alternative

Setup Time 45
 Setdown Time 15

Expected / Forecast Information

Department Code	Currency	Expected Per Pers.	Expected Flat Rate	Expected Total	Forecast
Banquet Room Rental	EUR		1000.00	1000.00	
Technical Equipment	EUR		50.00	50.00	

OK
 Table Res
 Cancel

2. Make any necessary changes, and then click OK to save the changes.

Edit Company Profile

This option is only available if a company profile has been linked. Via this option any details related to the company profile, such as the address, notes or marketing information can be viewed, added or changed.

1. Select EDIT COMPANY PROFILE from the short-cut menu.

The Edit Company Profile screen is displayed.

2. Make any changes necessary, and then click OK to save the changes.

Edit Contact Profile

This option is only available if a contact has been linked. Via this option any details related to the contact profile, such as the address, notes or marketing information can be viewed, added or changed.

1. Select EDIT COMPANY PROFILE from the short-cut menu.

The Edit Company Profile screen is displayed.

2. Make any changes necessary, and then click OK to save the changes.

Show Resources

Via this option all resources are displayed, resources such as menu details, notes and miscellaneous items can be viewed, changed or new ones added.

1. Select SHOW RESOURCES from the short-cut menu.

The Event Details screen is displayed.

PKG	Resource	Seating/Attribute /	Quantity	Gtd.	Currency	Code	Price	Forecast	Attributes	Notes	External	Una
	Ballroom I + II	Classroom Style			EUR	FUL	2250.00	2250.00				
	Laser Pointer		1		EUR	DAY	15.00	15.00				
	Speakers and Amplifier		1		EUR	DAY	170.00	170.00				
	Overhead Projector		1		EUR	DAY	30.00	30.00				
	Screen (3.60 x 3.60m)		1		EUR	HOU	5.00	40.00				

Everything that gets booked to an event is known as a resource.

Typical resources are:

- Function Spaces
- Miscellaneous Items such as decoration, technical equipment etc.
- Standard Menus - food and beverage items

Resources are displayed in the order in which they are booked. They are grouped according to item type - all miscellaneous items together and all standard menu items together, it is not possible to group different item types together, but the order can be changed within a group by moving the items up and down on the resources grid.

The FORECAST/REVENUE tab displays information about the expected, forecasted and posted revenue of the event; the tab is split into two parts:

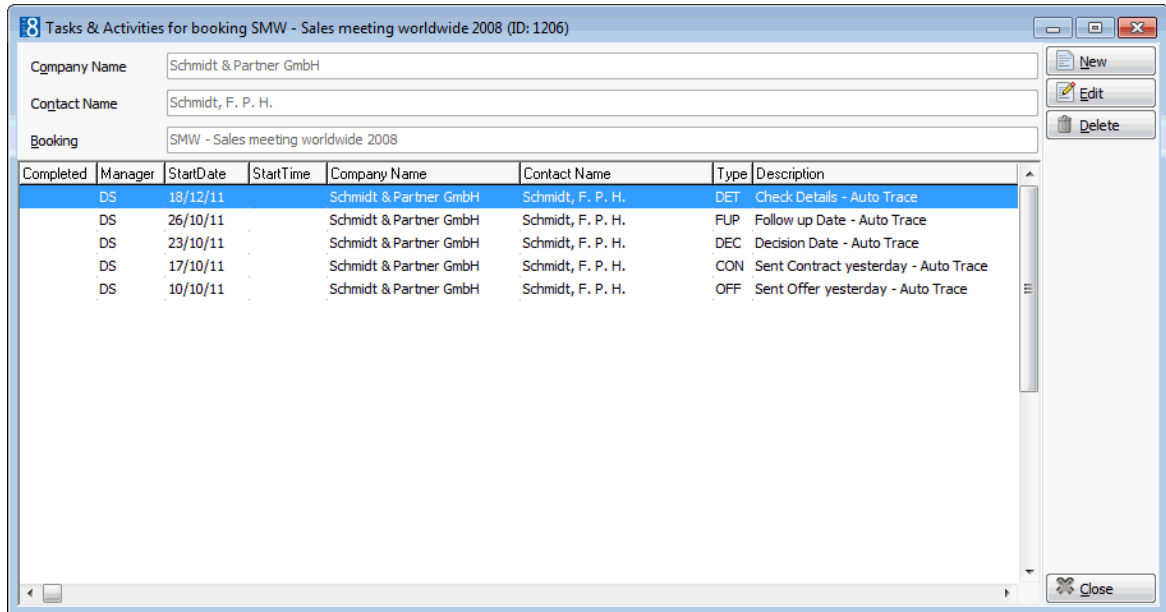
- Package items
- Non package items

Tasks & Activities

Use this option to view, edit, delete or create new tasks or activities that are specific to the booking. A typical example for a task linked to a booking master would be a 'follow up' on the signed contract.

1. Select TASKS & ACTIVITIES from the short-cut menu.

The Tasks & Activities dialog box for the selected booking master is displayed.

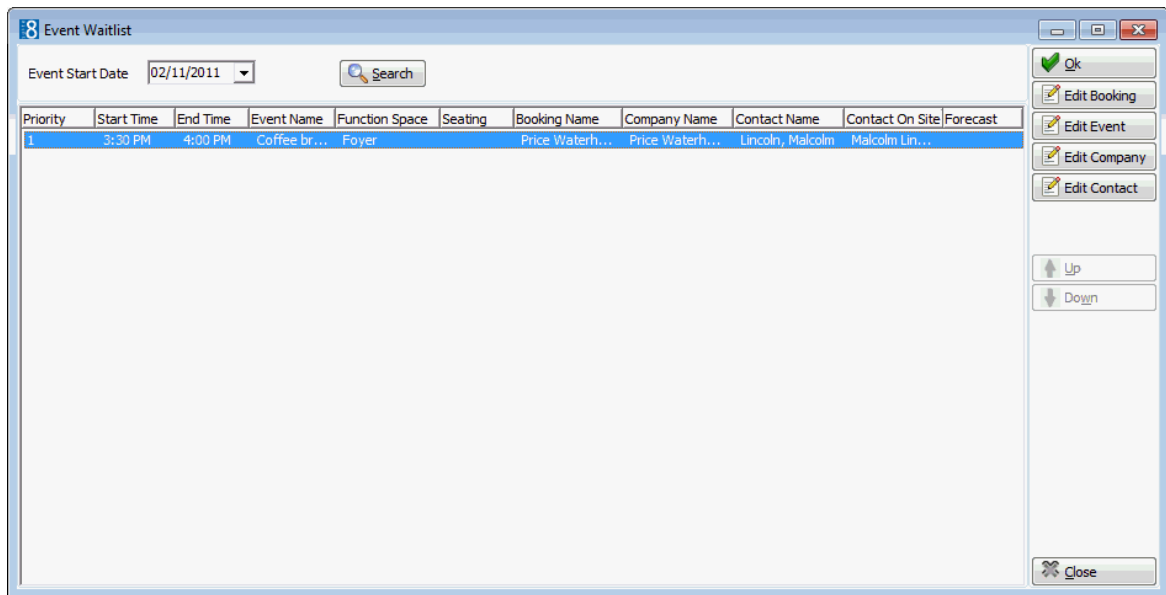


2. Click NEW to add a new task or activity or select an existing entry and click EDIT and then make any changes necessary.
3. Click CLOSE to close the task & activity screen.

Show Wait List

If waitlist events exist then they may be viewed from the Conference Diary or via the quick key Waitlist Priority (Ctrl + W). Viewing the waitlist via the quick key allows the user to view all events which are currently waitlisted for a particular day. Viewing the waitlist via the conference diary shows the waitlisted events of the selected function space or event.

1. Select SHOW WAITLIST on the shortcut menu to display the Event Waitlist screen.
 - The priority order of the waitlisted events may be changed by pressing the up and down arrows.
 - The Booking, Event, Company or Contact may be edited.



Add Sub Event

This option allows the creation of a sub event linked to the selected master event.

1. On the Conference Diary select the required event.
2. Select ADD SUB EVENT from the short-cut menu.

The New Event screen is displayed with a comment indicating that this is a Sub Event of 'Event Name'.

3. The Event Status, No. of Attendees and Function Space Information is taken from the master event, complete the remaining options - the start and end times must be within or overlap with the start and end times of the master event.
4. Click OK to save the sub event.

Convert as Sub Event

This option prompts the user to convert the selected event into a sub event. The option is only available for events which are not sub events and if other events exist in the same time period.

1. On the Conference Diary select the event to be converted to a sub event.
2. Select CONVERT AS SUB EVENT from the short-cut menu.

A list of all events within the time period is displayed.

3. Select the required event and click OK.

The event is now converted to be a sub event.

View Sub Events

If an event has sub events then this option displays all the sub events linked to the selected master event with the possibility to edit or change; the event, the function space, the company and/or contact as well as displaying or adding new resources, tasks or activities.

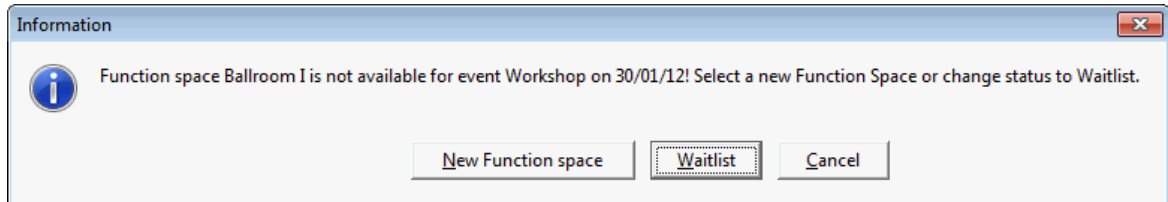
1. On the Conference Diary select a master event.
2. Select VIEW SUB EVENTS from the short-cut menu.

A list of all sub events for the selected event is displayed.

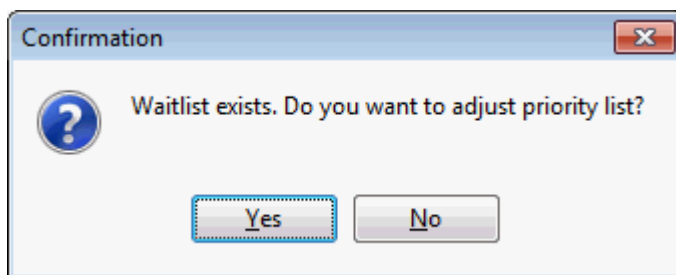
Convert as Master Event

This option prompts the user to convert the selected sub event into a master event. This option is only available for sub events.

1. On the Conference Diary select the event to be converted to a master event.
2. Select CONVERT AS MASTER EVENT from the short-cut menu.



3. Select either NEW FUNCTION SPACE to select a new function space or select WAITLIST to keep the existing function space but set the status to Waitlist.
4. If NEW FUNCTION SPACE is selected then the New Function Space dialog box is displayed and another function space can be booked.
5. If WAITLIST is selected then the event status is changed to waitlist. If waitlisted events already exist, then a message is displayed asking if you want to adjust the priority list.





6. Select YES to view the priority waitlist


View Master Event

If a master event exists then this option displays the master event linked to the selected sub event with the possibility to edit or change; the event, the function space, the company and/or contact as well as displaying or adding new resources, tasks or activities.

1. On the Conference Diary select a sub event.
2. Select VIEW MASTER EVENT from the short-cut menu.

The Master Event Details dialog box is displayed.

Note: Sub events are displayed with a green S and green triangle  and master events with a pink M and pink triangle 

-  Sub Event functionality is controlled by the parameter USE MASTER-SUB EVENTS under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

View all events

This option is used to view all events for a particular booking. Events and resources can be added, edited or deleted; in addition all other options can be accessed.

Print

This option is used to print correspondence related to the booking.

Roomplanner

This option opens the Roomplanner module; see the *Suite8 Roomplanner manual*.

Booking Options

- Notes
- Billing Instructions
- User Log
- Financial Accounts
- Postings
- Participants List

Function Space – Closed Periods

Occasionally a function space or combination of function spaces needs to be closed off for a period of time for reasons such as maintenance or refurbishment. A function space which already contains an event cannot be closed off.

You may close a function space via:

- The conference diary
- Function Space Definition under Setup → Configuration → Conference Management → Function Spaces



The colour to display closed periods in the conference diary is defined via the option COLOUR FOR CLOSED PERIOD under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

How to create a closed period

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen or press F3.
2. Point to the function space, date and time to be closed.
3. Left-click and hold down the left-mouse button.
4. Drag the mouse to the right until the required time is selected and release the left-mouse button, the short-cut menu is displayed.

Note: To close more than one day drag the mouse to the right in order to access the short cut menu and then define the dates and times on the Closed Periods dialog box.

5. Select CLOSE OFF FUNCTION SPACE, the closed periods dialog box appears.
6. Complete the dates, times and reason for closing the function space.
7. Click OK.

The closed period is displayed in the conference diary in the colour defined for closed periods.

How to edit a closed period

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen or press F3.
2. Point to the closed period to be edited and right-click to display the short-cut menu.
3. Select EDIT CLOSE PERIOD.
4. Make the changes on the closed period dialog box.
5. Click OK.

The closed period is updated on the conference diary.

Note: Closed periods for the past can not be updated.

How to delete a closed period

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen or press F3.
2. Point to the closed period to be deleted and right-click to display the short-cut menu.
3. Select DELETE CLOSE PERIOD, a confirmation message is displayed.
4. Click YES.

The closed period is removed on the conference diary.

Printing the Conference Diary

You can print the Conference Diary either for a single day, for a week, for a month or for a selected date range. In order to print the conference diary the required VIEW TYPE must be selected before pressing the PRINT button.

- On the monthly view calendar weeks are displayed on both the preview and the print out.
- On all views a legend of the booking statuses is displayed on both the preview and the print outs.


To print the Conference Diary

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen.
2. From the Conference Diary screen, select DAY, WEEK or MONTH in the VIEW TYPE box.
3. Click PRINT, the display print dialog box is displayed.
4. Select the print settings. For details on the print settings see the Conference Diary Print Options table below.
5. Click PRINT to print the conference diary.

If the view type MONTH is selected then the conference diary can also be exported to Excel by pressing the EXCEL button.

Conference Diary Print Options

Field	Definition
Display horizontal lines	If selected, horizontal lines will be shown in the printout of the diary.
Horizontal lines type	Select the type of horizontal lines that should be displayed.
Display vertical line	If selected, vertical lines will be shown in the printout of the diary.
Vertical lines type	Select the type of vertical lines that should be displayed.
Font	Select the font that should be used for the print out.
Display status colour	If selected the diary will be displayed and printed in the original colours. In other words, it will print in the colours that have been defined in the status definition.
Default colour	Select the default colour in which the diary should be printed.
Default Colour	If selected the diary will be displayed and printed in the default colour defined.
Row Height	Select the height for each row on the printout.
Print 2 weeks layout	Select this option to print the monthly view with two weeks on one page. If not selected then all days will be printed on one page. Note: This option is only displayed if the VIEW TYPE Month is selected.
Print Range	The defined range (date/time) will be printed. If the FULL DIARY check box is selected then the default number of days defined in configuration will be printed. Note: The Full Diary check box is only displayed if the VIEW TYPE Day is selected.

 The number of days to be printed in the conference diary when FULL DIARY is selected is defined by the parameter DEFAULT LOADED DAYS FOR DIARY under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

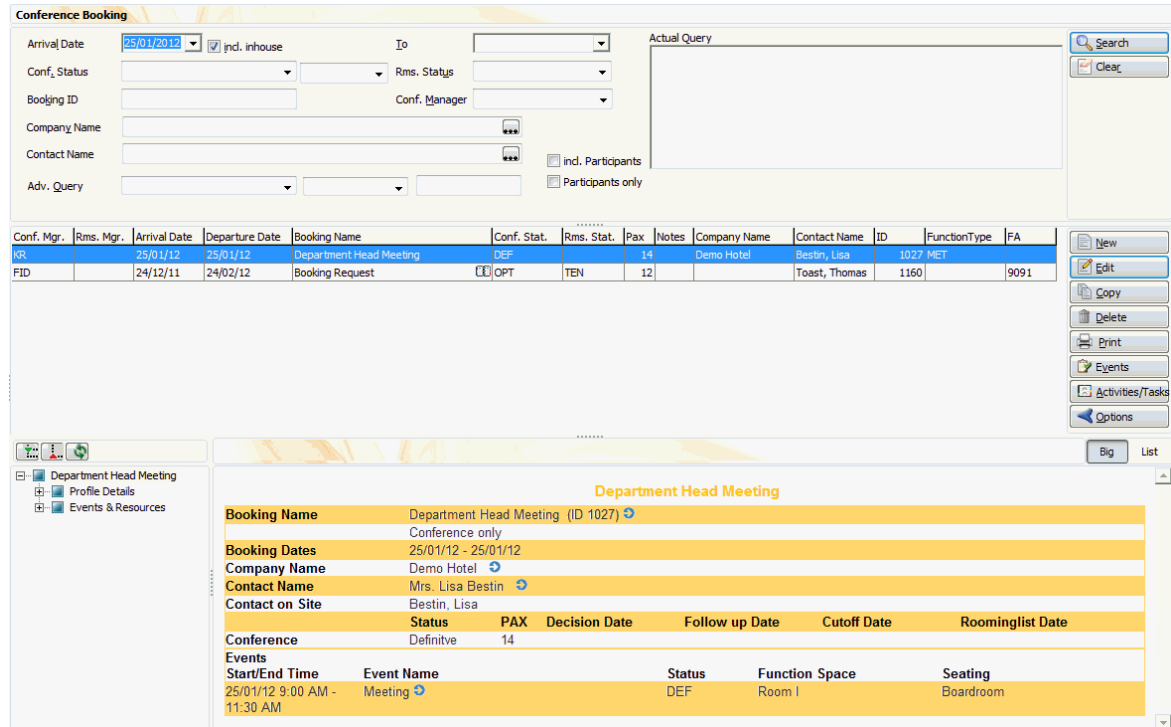
3 Conference Booking

Conference Booking Search

How to access the conference booking search screen

1. On the MEETING PLANNER menu, click CONFERENCE BOOKING.

The Conference Booking search screen is displayed; by default all bookings with today's arrival date are displayed.



The conference booking search screen is divided into four distinct areas:

- Query - consists of multiple basic booking master search criteria, such as Arrival Date, Conf. Status, Booking ID, Company Name, Contact Name and an advanced query option.
- Query Results - the results of the query shown in a grid format, including Conf. Mgr., Rooms Mgr., Arrival Date, Booking Name, Conference Status, Rooms Status, Number of persons (Pax), Notes, Company Name, Contact Name and Function Type.
- Tree View - a tree listing of all the details associated with this booking, including Profile details for company and contact.
- HTML page - free definable HTML display which by default has a list format or a 'big' format where the details are displayed in a non-grid style format.

Entering a conference booking query

The query screen is split into two sections:

- The basic search criteria
- The advanced query options

The basic search criteria

You may fill in multiple fields to narrow the search criteria. The actual query is displayed in a script format in a window on the right hand side of the screen. If no data is entered, the list of events displayed is in alphabetical order. The fields are explained in the Booking Master Search dialog box.

Fill in this Field	With this information
Arrival Date	Search for bookings based on the arrival date. By default, all bookings for today's date will be shown. Select a date from the calendar list box.
Include In house	If this box is checked, all bookings (with or without events) that match the entered date range and will be in house will be displayed.
To	Search for bookings based on a date range, if an arrival date is entered this will indicate the end of the date range. Select a date from the calendar list box.
Conf. Status	Select the booking (conference) statuses from the drop down list. If no status is entered, bookings with all booking statuses will be shown.
Rms. Status	Select the room status from the drop down list. If no status is entered all bookings will be shown.
Booking ID	Every booking master has a unique ID that will be assigned by the system. If a specific booking id is searched, then it can be entered in this field.
Conf. Manager	Select a conference manager from the drop down list of available managers.
Company Name	Click on the three dots next to the company name, if you would like to search for existing company profiles
Contact Name	Click on the three dots next to the contact name, if you would like to search for existing contact profiles.
incl. Participants	If a name is entered in the Contact Name search box then selecting this check-box will search for all bookings where this contact has been entered as a booking contact as well as a participant.
Participants only	If a name is entered in the Contact Name search box then selecting this check-box will search for all bookings where this contact has been entered as a participant.

The advanced query options

The advanced query consists of three selection fields:

- The first allows you to select from a drop-down list of query possibilities.
- The second limits the query to a second level or gives a choice of conditions.
- The third field requires either a free-format value or for the user to select a possible value from a drop-down list.

The fields are explained in the Advanced Query dialog box.

Field	Definition
Booking Group	The name of the booking group template. The following options are available while searching on booking group: Is equal to - will only display booking masters for the entered booking group name.

	<p>Is not equal to - will display all booking masters except for those of the entered booking group name.</p> <p>Note: This option is only available if the parameter USE GROUP TEMPLATES is active.</p>
Booking Name	<p>The name of the booking. The following options are available while searching on booking name:</p> <p>Is equal to - will only display booking masters for the entered name.</p> <p>Is not equal to - will display all booking masters except for those of the entered name.</p>
Rooms Manager	<p>The room manager. The following options are available while searching on rooms manager:</p> <p>Is equal to - will only display booking masters for the selected manager.</p> <p>Is not equal to - will display all booking masters except for those where the selected manager is the conference manager.</p>
Departure Date	<p>Advanced query on the departure date. The following options are available while searching on departure date:</p> <p>Is equal to - will show all booking masters where the departure date is an exact match.</p> <p>Is not equal to - will show all bookings where the departure date is not equal to the entered one.</p> <p>Is greater than - will show all booking masters where the departure date is greater than the one entered.</p> <p>Is less than - will show all booking masters where the departure date is less than the entered one.</p>
Creation Date	<p>Each booking master is assigned to a creation date. The following options are available while searching on creation date:</p> <p>Is equal to - will show all booking masters where the creation date is an exact match.</p> <p>Is not equal to - will show all bookings where the creation date is not equal to the entered one.</p> <p>Is greater than - will show all booking masters where the creation date is greater than the one entered.</p> <p>Is less than - will show all booking masters where the creation date is less than the entered one.</p>

Note: The actual query is displayed in script format in a window on the right hand side of the screen and as long as the filter is not cleared by pressing the CLEAR button, each additional query will be added to the actual query list.


Wildcards


The search criteria can also be entered using wildcards (%). This is helpful in the company and contact name fields. For example, M%ller will return Miller, Muller, %Bank will return Investment Bank, American Bank and Fidelio% will return Fidelio Gmbh or Fidelio Inc.

Activating the search:

To activate the search the user must click the SEARCH button. Clicking the SEARCH button will return the maximum number of bookings defined in the configuration, with the question to display more if there are more to be displayed.

A list of bookings that match the specified criteria is displayed. The query criteria can be easily reset by clicking the CLEAR button.

 A full explanation of the conference booking screen search behaviour can be found in the Suite8 Configuration Manual under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.

 The maximum number of lines displayed is controlled by the parameter MAXIMUM LINES IN LIST under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.

New Booking Master

How to create a new booking master

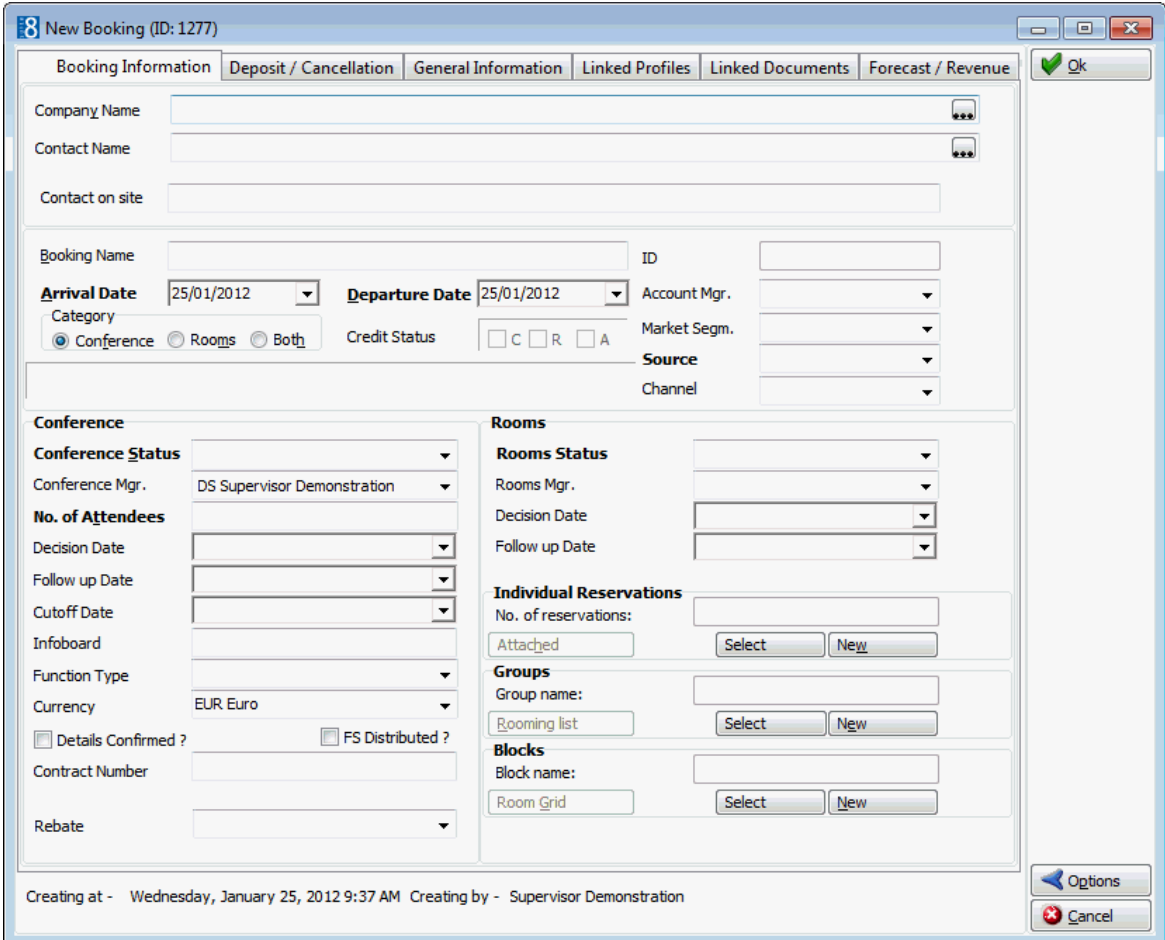
1. On the MEETING PLANNER menu click CONFERENCE BOOKING and then click NEW to display the New Booking screen.

or

Click EVENT MANAGEMENT and then click NEW.



2. The Booking Master Search screen is displayed; click NEW.

The New Booking master screen is displayed; it consists of six screens, each one represented by a tab.



Booking Master Screen Tabs

Tab	Option
Booking Information	Information about the booking, such as arrival, departure, number of persons and be entered.
Deposit/Cancellation	Information about deposit and cancellation policies.
General Information	Information about changes to the status or deposit/cancellation.
Linked Profiles	Linked profiles.
Linked Documents	Linked Documents.
Forecast / Revenue	Information about the expected, forecast and posted amounts of the total booking including room reservations linked to the booking and additional posted amounts on the linked financial account.


-  The changing of the account manager on a conference booking is controlled by the user right CHANGE ACCOUNT MANAGER under Setup → Configuration → Users → User Definition → Rights → Booking Master.
-  The entering of bookings and events in the past is controlled by the user right ENTER BOOKINGS IN THE PAST under Setup → Configuration → Users → User Definition → Rights → Booking Master.

Booking Information

The Booking Information screen is open by default when selecting either NEW or EDIT. To create a new booking master either a company or contact profile has to be selected.

Booking Master – Booking Information tab

Field Name	Definition
Company Name	If applicable, select the company via the three dots next to the company name. Use the search criteria provided by the profile search screen to find the company name or create a new company profile. If the selected company name has a rebate code linked then at the arrival date field a question will be displayed asking if the rebate from the profile should be linked to the booking.
Contact Name	If applicable, select the contact via the three dots next to the contact name. Use the search criteria provided by the profile search screen to find the contact or create a new contact profile
Contact on site	Enter the name of the contact on site if it differs from the contact name
Linked Company	If a company profile has been linked via the LINKED PROFILES tab it will be displayed under this option
Linked Contact	If an individual profile has been linked via the LINKED PROFILES tab, it will be displayed under this option

Group Template	<p>Defines which, if any, group template is linked to this group. Group templates may be used to link specific groups together. Click the  button to select an existing template or to create a new template.</p> <p>From the Group Templates screen the following options are available:</p> <p>SEARCH - enter search criteria and press search to activate.</p> <p>FULL SEARCH - press the Full Search button to return all group template names matching the search criteria.</p> <p>CLEAR - press clear to clear the search criteria.</p> <p>NEW - to enter a new group template.</p> <p>EDIT - to edit an exiting group template.</p> <p>FIND IN GRID - to further narrow the group template search.</p> <p>SELECT - to select the highlighted group template and link it to the booking master.</p>
Booking Name	<p>Enter the booking name such as Birthday Party, Annual Sales Conference or wedding.</p> <p>If the parameter COPY PROFILE NAME INTO BOOKING NAME is active then the booking name is automatically completed with the profile name. If there is both a company name and a contact name then the company name is used, otherwise the contact name is used.</p>
Arrival Date (Mandatory)	<p>Enter the arrival date or the date of the function. If the selected company name has a rebate code linked then a question will be displayed asking if the rebate from the profile should be linked to the booking.</p> <p>Note: The entering of an arrival date in the past is controlled by the user right ENTERING BOOKINGS IN THE PAST.</p>
Departure Date (Mandatory)	Enter the departure date of the end date of the function
Category	
Conference Rooms Both	<p>Select either option. The conference will be selected automatically if the arrival date is the same as the departure date. If the arrival date is not the same as the departure date and no rooms are booked, this option should be selected as otherwise the application forces the user to enter room booking information.</p> <p>Note: The Rooms option will not be accessible if the arrival date is the same as the departure date.</p>
Credit Status:	<p>Displays the credit status from the selected profile of the booking. It will be filled in automatically depending on the company/contact that gets linked to the booking master. If a company/contact has one of the three credit statuses:</p>

	<p>C - Cash R - Restricted A - Accounts receivable</p> <p>A message indicating which credit status has been applied to the profile will be displayed. The credit status of a booking can only be changed on profile level, not on this screen.</p>
ID	Booking Id number, automatically assigned by the system.
Account Manager	Indicates the initials of the sales manager defined on the company/contact level. If no account manager has been filled in, a selection can be made but existing (filled in) account managers can not be changed on the booking level.
Market Segm.	Select the market segment from the drop down list. The market segment entered here at booking master level is transferred to any attached group or individual reservation.
Source	Select the source segment from the drop down list. The source defines how the property got the booking, such as airline, travel agent, central system. The source code entered here at booking master level is transferred to any attached group or individual reservation.
Channel	Select the channel from the drop down list. Channel codes are attached to a conference booking in order to track how the reservation or booking was made at the property, for example, via the internet, via email or via the telephone. The channel code entered here at booking master level is transferred to any attached block, group or individual reservation.

Booking Master – Conference Details

Field Name	Definition
Conference Status (Mandatory)	From the drop down list select the status for the conference part of the Booking, such as definite, tentative or waitlist
Conference Mgr.	From the drop down list select the manager that is responsible for the conference part of the booking
No. of Attendees Mandatory	Enter the number of attendees. If the booking has several events with a different number of people, enter here the highest amount of attendees
Decision Date	Select a date from the calendar, if the customer has to decide by a certain date The date field will be completed automatically if certain conditions are met. The default number of days and the statuses for which it is valid are defined in the configuration.
Follow Up Date	Select a date from the calendar, if the property would like to follow up with the customer, for example the date when the signed contract has to be returned.

	The date field will be completed automatically if certain conditions are met. The default number of days and the statuses for which it is valid are defined in the configuration.
Cutoff Date	This date indicates when the function space should be released. Currently no function space is released automatically. Select a date from the calendar
Info board	Enter the text that should be used for the information board
Function Type	The type of the function, such as conference or meeting. Select the function type from the drop down list.
Currency	Select a currency from list box. By default the currency defined under GLOBAL SETTINGS → CURRENCIES, tab will be entered
Details Confirmed?	Check this box to indicate that all details for this booking have been confirmed
FS distributed?	Indicates whether the function sheet has already been issued to the respective departments
Contract Number	Same as booking ID.
Create booking as calendar event	<p>This option is only visible when the global setting CONFERENCE BOOKINGS AS CALENDAR EVENTS on the CCM tab is active and the status definition of the selected conference status is DEF.</p> <p>If the parameter for manual creation is active the option is displayed and can be selected manually. If the parameter for automatic creation is active the option is selected by default but may be de-selected if not required.</p> <p>Saving the booking with the option selected will create the calendar event.</p> <p>In the calendar the booking name is displayed in the calendar event description and the company, contact and booking ID are displayed in the notes. The calendar event will be updated when changing any of these fields or the arrival and departure dates in the booking.</p> <p>When changing the conf. status to a non-definite status or deleting a booking the calendar event will be removed automatically.</p> <p>Calendar events will be created when copying bookings, if the option was selected in the original booking the status definition of the selected conference status is DEF.</p>
Rebate	<p>Defines if a pre-defined rebate should be applied to the booking.</p> <p>If events exist then a message to check the booked resources is displayed when a rebate is added, changed or removed.</p>

Booking Master - Rooms Details

Field Name	Definition
Rooms Status Mandatory	Select the status from the drop down list select that applies to the room bookings. It is not uncommon that the conference and rooms status are different during the course of the booking life cycle

Rooms Mgr.	Select the responsible manager/ user for the room bookings
Decision Date	Select a date from the calendar. Used to define a date by which the customer has to decide to book or not. The date field will be completed automatically if certain conditions are met. The default number of days and the statuses for which it is valid are defined in the configuration.
Follow Up Date	Select a date from the calendar the property would like to follow up with the customer. The date field will be completed automatically if certain conditions are met. The default number of days and the statuses for which it is valid are defined in the configuration.
Individual Reservations	
No of reservations:	Displays the number of individual reservations that have been attached to the booking. An unlimited number of individual reservations can be linked to a block
Attached	Press the ATTACHED button to view the reservations that have been attached to a booking master including any cancelled reservations.
Select	Press the SELECT button to open the reservation navigator, select an existing reservation and link it to the booking master. Note: It is possible to link reservations which are not within the date range of the booking, however only reservations which are not linked to another booking are displayed
New	Press the NEW button to enter a new reservation and link it to the booking. Note: The default rate code used in the reservation is the default rate code which is defined under Configuration → Global Settings → Reservation. The default market, source codes and channel codes are taken from the booking master and not from any defaults defined in configuration.
Groups	
Group name	Displays the group name of the attached group. Only one group can be attached.
Rooming List	Press ROOMING LIST to view or change the rooming list of attached groups
Select	Press the SELECT button to open group navigator, select an existing group and link it to the booking master. If a financial account is linked to the booking master then a question is displayed asking if the financial account should be linked to the group.
New	Press the NEW button to enter a new group reservation. Note: The default rate code used in the reservation is the default rate code which is defined under Configuration → Global Settings → Reservation. The default market, source codes and channel codes are taken from the booking master and not from any defaults defined in configuration.

	If a financial account is linked to the booking master then a question is displayed asking if the financial account should be linked to the group.
Blocks	
Block Name	Displays the block name of the attached block. Only one block can be attached to a booking master.
Room Grid	Press the ROOM GRID button to view the room grid of the attached block
Select	Press the SELECT button to open block navigator, select an existing block and link it to the booking master
New	Press the NEW button to enter a new block reservation. Note: The default market, source codes and channel codes are taken from the booking master and not from any defaults defined in configuration. If a block code format has been pre-defined then the block code is automatically created based on the defined setup. For example, the format CCCDDMMYY is the first 3 letters of the company name and the starting day, month, year. When creating a new block with a starting date of the 17th July 2009 and the company profile BBC linked, then the block code field is automatically completed with BBC170709.

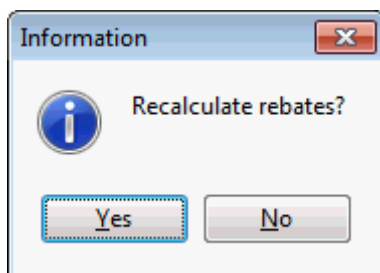
Conference booking rebates

Rebates can be applied globally via a rebate code on the booking master or can be applied per resource as a percentage or as a flat rate.

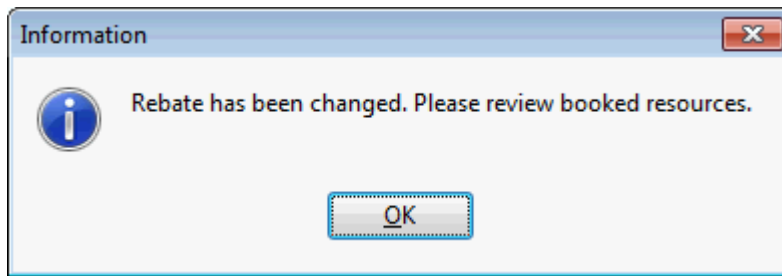
Applied rebate codes on the booking can be changed on resource level per attached resource, for example, you can apply a rebate code for 10 % rebate on room rental and apply for one specific resource apply a 20% rebate.

How do rebates work?

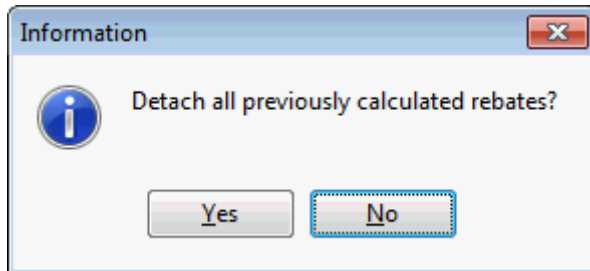
- When selecting a rebate code when editing a booking master, rebates are applied according to the defined rebate configuration under Configuration → Cashiering → Rebate Configuration of the linked rebate code.
- If the rebate code is changed when editing a booking the message 'Recalculate rebates?' is displayed.



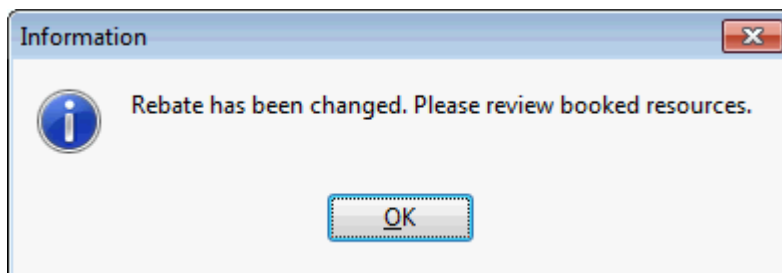
- Selecting YES recalculates the rebates according to the linked rebate codes.
- Selecting NO leaves the existing rebate calculation; the message 'Rebate has changed. Please review booked resources' is displayed.








- If a rebate code is removed the message 'Detach all previously calculated rebates?' is displayed.



- Selecting YES removes the rebate codes; all manually entered rebates on the booked resources are also removed.
- Selecting NO leaves the existing rebate calculation; the message 'Rebate has changed. Please review booked resources' is displayed.



-  The possibility to link a group template to a conference booking is controlled by the parameter USE GROUP TEMPLATES under Setup → Configuration → Global Settings → CCM → Conference 1 tab.
-  The entering of bookings and events in the past is controlled by the user right ENTER BOOKINGS IN THE PAST under Setup → Configuration → Users → User Definition → Rights → Booking Master.
-  Rebate functionality is controlled by the parameter ENABLE CARDLESS REBATE HANDLING under Setup → Configuration → Global Settings → CCM → Conference 1 tab.
-  The adding, editing or removal of rebate codes on the booking master is controlled by the user right REBATE LINKING under Setup → Configuration → Users → User Definition → Rights → Booking Master.
-  The adding, editing or removal of a rebate percentage or flat rate on a resource is controlled by the user right CHANGE REBATE FOR RESOURCES under Setup → Configuration → Users → User Definition → Rights → Booking Master.

Note: Block Reservation functionality requires an additional license code.

Deposit & Cancellation

This option allows users to enter any deposits the customer has to pay and/or any cancellation procedures that may apply if the customer decides to cancel the booking.

Cancellations

Cancellations are defined separately for rooms and conference. There are no limitations as to the number of cancellation penalties that can be entered.

Cancellation policies (i.e. 50% 14 days prior to arrival and 100% 5 days prior to arrival) can be pre-defined under Setup → Configuration → Global Settings → Conference tab. If pre-defined cancellations exist, they will be applied to every new booking that will be created. If they can not be applied to the booking because the due date has already passed, the user will be prompted with a confirm message.

- Click NEW to enter a new cancellation penalty.
- Click EDIT to edit existing cancellation penalties.
- Click DELETE to delete existing cancellation penalties.

Booking Master - Deposit Cancellation tab - Cancellation

Field Name	Explanation
Cutoff Date	Entered on the booking information tab. Displayed here as view only.
Cancelled by	Defines the date by when the booking can be cancelled.
Percentage	Enter the percentage that is due (depending on the cancellation date).
Amount Due	Calculated automatically depending on the percentage entered. Also works vice versa. Enter the amount and the percentage will be calculated.

Deposits

Deposits are also defined separately for rooms and conference. There are no limitations as to the number of deposit payments that can be entered.

- Click NEW to enter a new deposit payment.
- Click EDIT to edit an existing deposit payment.
- Click DELETE to delete an existing deposit payment.

Booking Master - Deposit/Cancellation tab - Deposit

Field Name	Definition
Booked To Date	Filled automatically with the room revenue. For future reservations the amount will be taken from the forecast tables.
Total Deposit Required	By default contains the same as booked to date, but in case a different deposit amount is requested it can be defined here.
SNo	Sequence number will be generated by the system.
Due Date	Enter the due date of the deposit payment.
Percentage	Enter the deposit percentage.
Amount Due	If the percentage has been filled, the amount due gets filled in automatically, based on the total deposit amount entered.
Paid	Select this option if the deposit has been received.

General Information

This option tracks the status changes and changes to cancellations and reinstatements separately for rooms and conference.

Select the INFORMATION TYPE from the drop-down list:

- Status change detail
- Cancellation/Reinstatement detail

Status change details

Field Name	Definition
Rooms/Conference	
Status Old	Tracks the old or original status for the rooms and/or the conference.
Status New	Tracks the new status for the rooms and/or the conference.
Date Changed	Tracks the date the status was changed for the rooms and/or the conference.
Changed by	Tracks the user that entered the changes for the rooms and/or the conference.

Cancellation/Reinstatement detail

Field Name	Definition
Rooms/Conference Reason	Select a cancellation reason from the drop down list
Rooms/Conference Lost To	If known, a competitor can be selected from the drop down list
Rooms/Conference History	Shows any cancellation and/or reinstate Information
Rooms/Conference Description	Additional notes can be entered

Linked Profiles

Linking profiles to the booking master

On the booking master edit screen, a company and/or a contact can be linked to the booking. In some cases, however additional profiles such as a travel agent and/or a source also need to be linked. To link additional profiles, use the LINKED PROFILES tab. In addition to linking new profiles, existing links can be viewed and profile information such as address, telephone numbers can be changed.

Press NEW LINK to link additional profiles, the profile search screen will appear and an existing profile can be selected or a new one can be created.

Select a profile and press EDIT PROFILE to edit a linked profile. Profile information such as address, telephone numbers can be changed.

Select a profile and press DELETE LINK to remove the link between the profile and the booking. Any additional linked profiles will be visible on the booking master edit screen on the fields: LINKED COMPANY and LINKED CONTACT.

Note: That via the booking master edit screen it is not possible to edit or delete the additionally linked profiles. These options are only available via the tab LINKED PROFILE.

Linked Documents

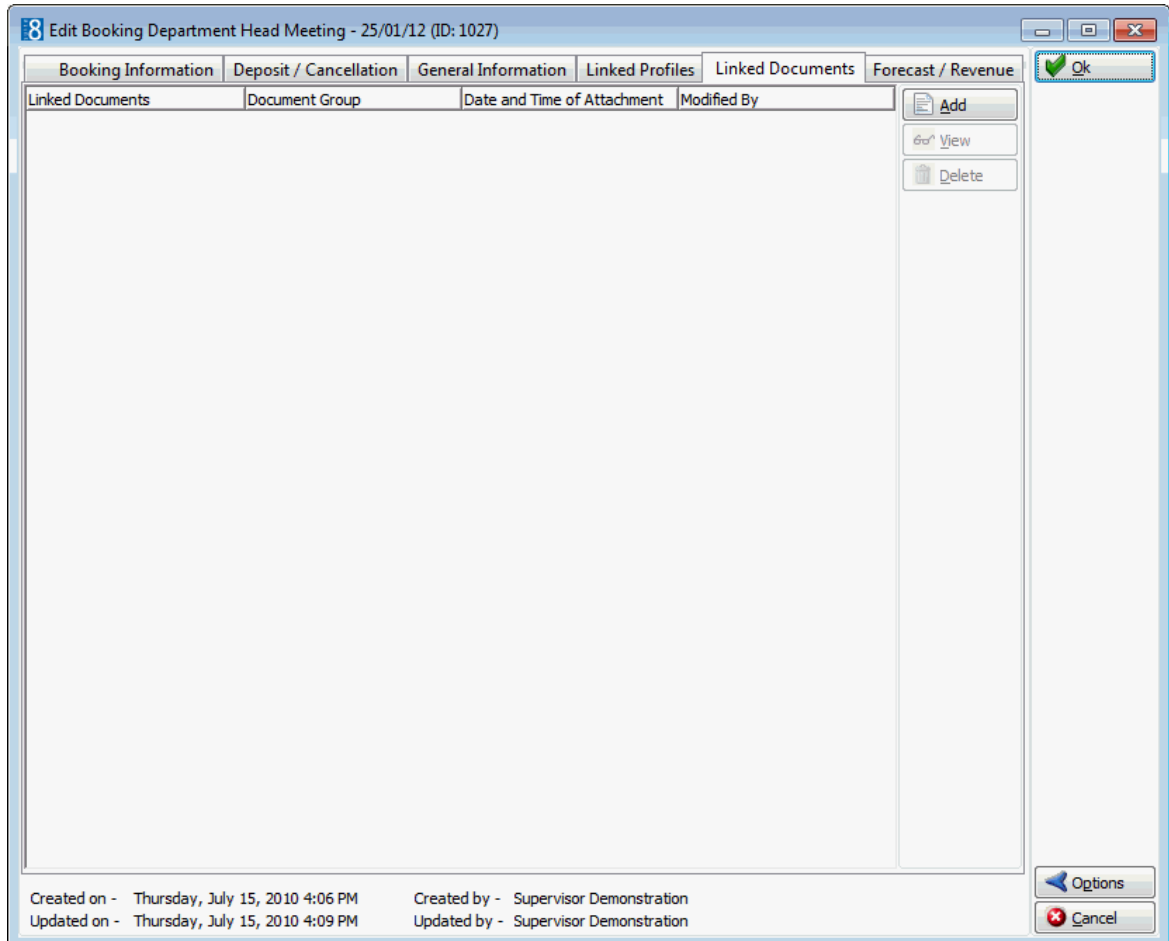
This option enables the user to view, edit or add different types of documents to a booking master. It is recommended to place these documents on a shared network path to which all users have access. If a scanner is connected to the workstation you can also scan and attach documents such as contracts, letters or pictures. The scanner needs to be 'Twain' compatible.

Document groups and path are defined under Setup → Configuration → Miscellaneous → Document Types.

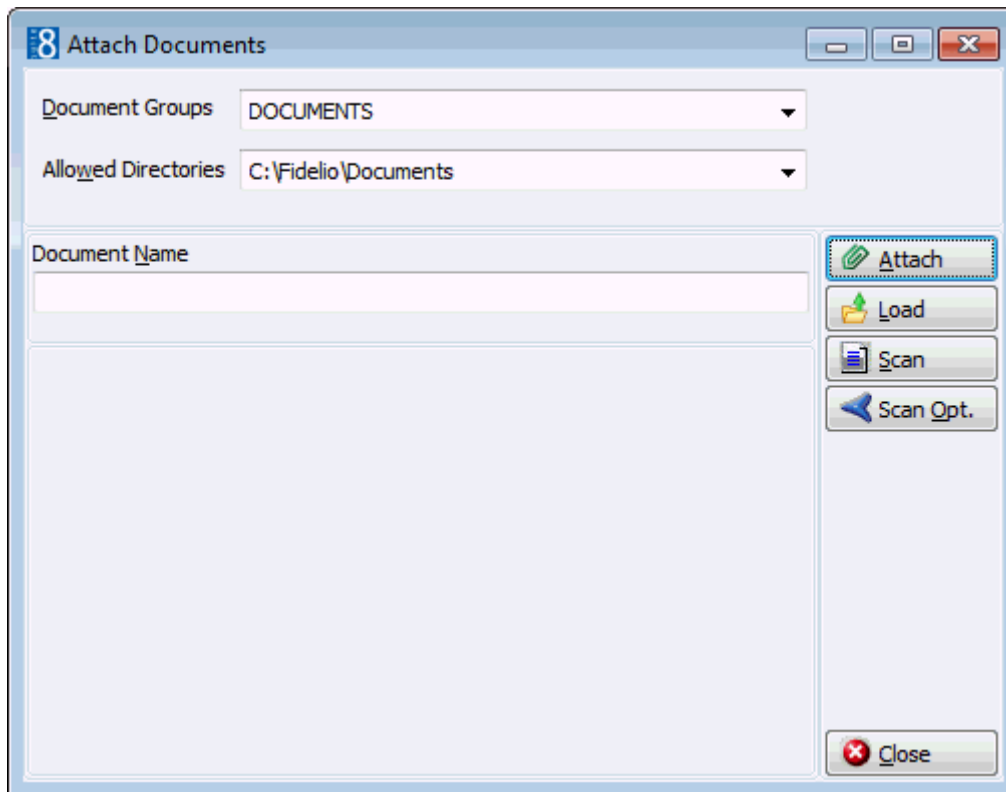
Note: Linked documents can be viewed, edited or added via the linked documents tab on the booking master edit screen or via the options button on the conference booking grid.

How to link a document

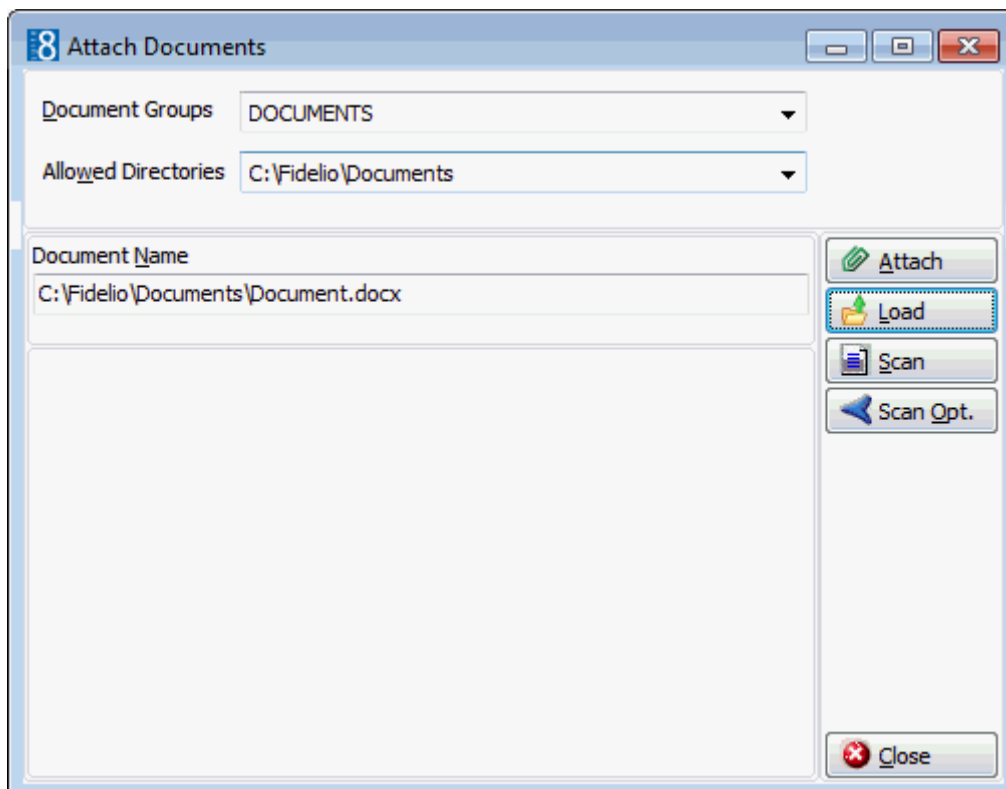
1. Select the LINKED DOCUMENTS tab.



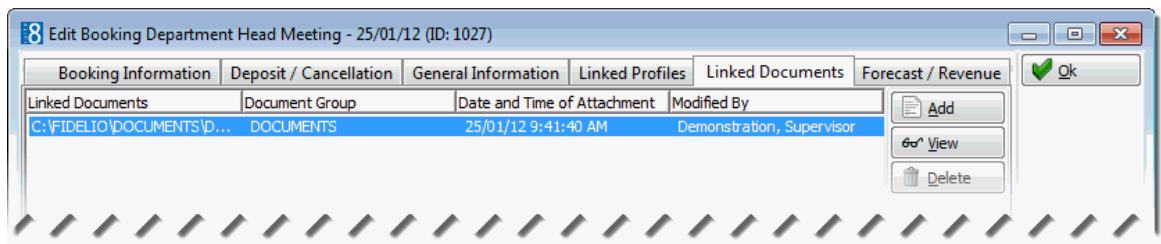
2. Click ADD, the Attach documents dialog box is displayed.



3. In the DOCUMENT GROUPS list, click the document group you want.
4. In the ALLOWED DIRECTORIES list, click the allowed directory you want.
5. Click BROWSE to display the list of documents.
6. Select the required document and click OPEN, the Document Name field is filled.



7. To attach the document, click ATTACH, the document is shown as linked on the linked documents tab.



Note: Pictures or images may be attached in JPG or BMP format. The default setting is JPG, but this may be changed via the SCAN OPT. button. The selected settings will be saved for that user.

How to view/edit a linked document

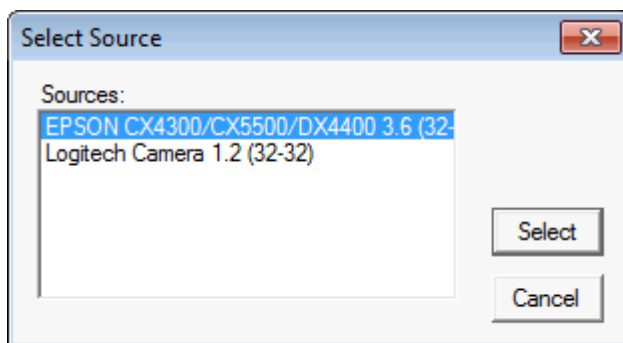
1. Select the LINKED DOCUMENTS tab.
2. Select the document and click VIEW.

Suite8 opens the relevant application, for example, Word if the document is a Word document or Crystal Reports if the document is a Crystal Report.

Note: The document may be edited directly from within the opened application.

How to scan and link a document

1. Select the LINKED DOCUMENTS tab.
2. CLICK ADD, the attach documents dialog box is displayed.
3. In the DOCUMENT GROUPS list, click the document group you want.
4. In the ALLOWED DIRECTORIES list, click the allowed directory you want.
5. Click SCAN, the select source dialog box is displayed.



6. Select the source and click SELECT to open the scanner application.
7. Scan the document.
8. Click ATTACH to link the scanned document.

Note: The scanner needs to be 'Twain' compatible.

Forecast / Revenue

The Forecast / Revenue tab displays information about the expected, forecast and posted amounts of the total booking including room reservations linked to the booking and additional posted amounts on the linked financial account. The forecasted and posted figures are displayed both as a gross figure and a net figure with the tax displayed separately.

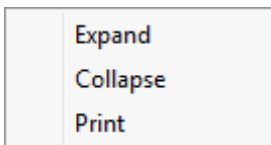
8 Edit Booking - 04/12/12 (ID: 1289)

Booking Information				Deposit / Cancellation		General Information		Linked Profiles		Linked Documents		Forecast / Revenue		
Date	Event time	Event name	Departmen...	Expected	Forecast	Net	Tax	Posted	Net	Tax				
Total boo...				7,350.00	7,500.00	6,302.52	1,197.48	0.00	0.00	0.00				
04/12/12				4,050.00	4,050.00	3,403.36	646.64	0.00	0.00	0.00				
	09:00 - 18:00	Meeting		1,300.00	1,300.00	1,092.44	207.56	0.00	0.00	0.00				
	10:00 - 10:30	Coffee break...		375.00	375.00	315.13	59.88	0.00	0.00	0.00				
	12:00 - 14:00	Lunch		1,250.00	1,250.00	1,050.42	199.58	0.00	0.00	0.00				
	15:30 - 16:00	Coffee break...		375.00	375.00	315.13	59.88	0.00	0.00	0.00				
	19:00 - 21:00	Dinner		750.00	750.00	630.25	119.75	0.00	0.00	0.00				
05/12/12				3,300.00	3,450.00	2,899.16	550.84	0.00	0.00	0.00				
	10:00 - 10:30	Coffee break...		375.00	375.00	315.13	59.88	0.00	0.00	0.00				
	12:00 - 14:00	Lunch		1,250.00	1,250.00	1,050.42	199.58	0.00	0.00	0.00				
	15:30 - 16:00	Coffee break...		375.00	375.00	315.13	59.88	0.00	0.00	0.00				
	09:00 - 18:00	Meeting		1,300.00	1,450.00	1,218.49	231.51	0.00	0.00	0.00				

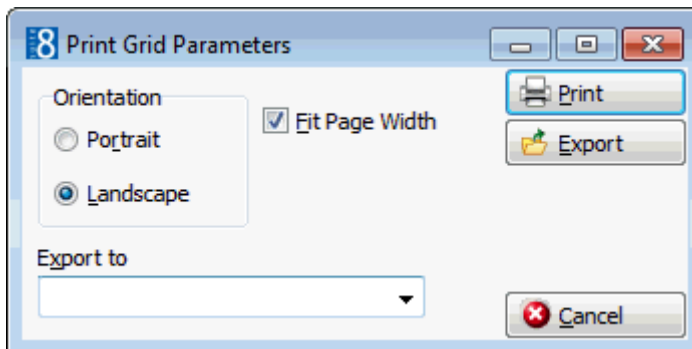
Created on - Sunday, December 04, 2011 12:42 PM Created by - Demonstration Supervisor
Updated on - Sunday, December 04, 2011 12:42 PM Updated by - Demonstration Supervisor

How to print or export forecast/revenue information

1. Select the FORECAST/REVENUE tab.
2. Expand or collapse the grid by clicking on the **+** or **-** buttons or by right-clicking and selecting EXPAND or COLLAPSE from the short-cut menu.



3. Once the grid is displayed as required, right-click and select PRINT to display the Print dialog box.



4. To print the report make any required adjustments to the print parameters and click PRINT.
5. To export the report select the export type from the EXPORT TO box; the available export types are:

-
- ASCII File
 - CSV File
 - Excel Document
 - HTML Document
6. Click EXPORT, the document is generated and exported.

Editing a Booking Master

How to edit an existing booking master

1. On the MEETING PLANNER menu, click CONFERENCE BOOKING.
The Conference Booking search screen is displayed.
or
2. Click EVENT MANAGEMENT and then click NEW.
The Booking Master Screen is displayed.
3. Search for and locate the required booking master, then click the EDIT button.
The edit booking master screen is displayed, it consists of six screens, each one represented by a tab.
 - Booking Information
 - Deposit & Cancellation
 - General Information
 - Linked Profiles
 - Linked Documents
 - Forecast/Revenue

See: [New Booking Master](#) (See page 54)

Copying a Booking Master

The copy option may be used to duplicate a booking master for reoccurring bookings. Two types of series may be entered:

- Custom - this option is used when details such as the arrival date do not follow a set frequency.
- Series - this option should be used if the arrival date and interval of each booking is known. For example, if each booking is for every second week of the month or if between each arrival date there is an interval of 5 days.

Enter a custom series

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking search screen.
2. Select a booking master in the grid and click COPY, the Copy dialog box is displayed.
3. Select CUSTOM to display the Booking Copy dialog box.
4. Enter the NO. OF COPIES required. A row of details to be completed for each copy is displayed on the Booking Copy dialog box.

8 Copy Booking Department Head Meeting - 25/01/12 (ID: 1027)

Booking Dates : 25/01/12 - 25/01/12

No. of Copies : 1 (Press tab to create the copies.)

	Date	Options	Conference Status
1	26/01/2012	Conference Only	DEF/Definitve

OK Cancel

5. Type the arrival date for the booking in the DATE box **or** click the drop down arrow and select a date from the calendar.
6. In the OPTIONS box click the drop-down arrow, and select the type of booking.
7. Select the CONFERENCE STATUS from the drop-down list.
8. Select the ROOMS STATUS from the drop-down list, this status will be applied to all the bookings. This option is only displayed if rooms have been entered on the original booking.
9. Select the BLOCK STATUS from the drop-down list, this status will be applied to all the bookings. This option is only displayed if a block was entered on the original booking.
10. Enter the BLOCK CODE; his code will be valid for all copies. This option is only displayed if a block was entered on the original booking.
11. Click OK to confirm the copy process, a processing message is displayed.

The required number of bookings are created. All are exact copies of the original booking with the exception of the criteria entered in the booking copy dialog box, the contract number and the block code, which is the entered block code plus a sequence number. The suffix (COPY) is added to the booking name.

Note: Checks on availability of rooms, functions space and capacity are performed and will be returned by Suite8 with the relevant messages.

Note: If individual reservations have been entered in the original booking then they will be copied with the linked reservation status for the selected room status.

Enter a fixed series

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking search screen.
2. Select a booking master in the grid and click COPY, the Copy dialog box is displayed.
3. Select SERIES to display the Booking Copy dialog box.

4. In the No. OF SERIES box enter the number of copies required. Leave this field blank if the number of tour series will be determined by the FREQUENCY, NEXT ARRIVAL and LAST ARRIVAL dates.
5. Select the CONFERENCE STATUS from the drop-down list, this status will be applied to all the bookings.
6. Select the ROOMS STATUS from the drop-down list, this status will be applied to all the bookings. This option is only displayed if rooms have been entered on the original booking.
7. Select the BLOCK STATUS from the drop-down list, this status will be applied to all the bookings. This option is only displayed if a block was entered on the original booking.
8. Enter the BLOCK CODE; his code will be valid for all copies. This option is only displayed if a block was entered on the original booking.
9. Enter the FREQUENCY, this is the interval of the series, click either DAYS, WEEKS or MONTHS, for example:

If the series is every 10 days then enter **10** and select the DAY option, the booking will be copied to every 10th day.

If the series is every 5 weeks then enter **5** and select the WEEK option, the booking will be copied to every 5th week.

If the booking occurs every month then a day may be defined. If the series takes place every 2nd month on a Monday then enter **2**, select the MONTH option and select MONDAY, the booking will be copied to every 2nd month on a Monday; the day takes priority which means that the interval may not be exactly two months but maybe 2 months and 2 days.

If the booking should be copied to every 2nd month exactly then select the day NOT DEFINED, this way the booking will exactly one month apart regardless of the day on which it falls.
10. Type the arrival date of the next booking in the NEXT ARRIVAL box **or** click the drop down arrow and select a date from the calendar.
11. If the No. OF SERIES option is not used then type the arrival date of the last event in the LAST ARRIVAL box **or** click the drop down arrow and select a date from the calendar.
12. Type the decision date in the DECISION DATE box **or** click the drop down arrow and select a date from the calendar. The entered decision date is applied to all the booking copies.
13. Type the follow up date in the FOLLOW UP DATE box **or** click the drop down arrow and select a date from the calendar. The entered follow up date is applied to all the booking copies.
14. Click OK to confirm the copy process, a processing message is displayed.

The required number of bookings are created. All are exact copies of the original booking with the exception of the criteria entered in the booking copy dialog box, the contract number and the block code, which is the entered block code plus a sequence number. The suffix (COPY) is added to the booking name.

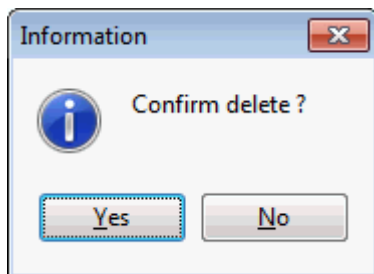
Note: Checks on availability of rooms, functions space and capacity are performed and will be returned by Suite8 with the relevant messages.

Note: If individual reservations were entered on the original booking then they will be copied with the linked reservation status for the selected room status.

Deleting a Booking Master

How to delete a booking master

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking search screen.
2. Select a booking master and click DELETE, a confirmation message is displayed.



3. Select YES to delete the booking master.
4. The booking master is deleted along with all other details such as events and room block, deposit & cancellations are also deleted.

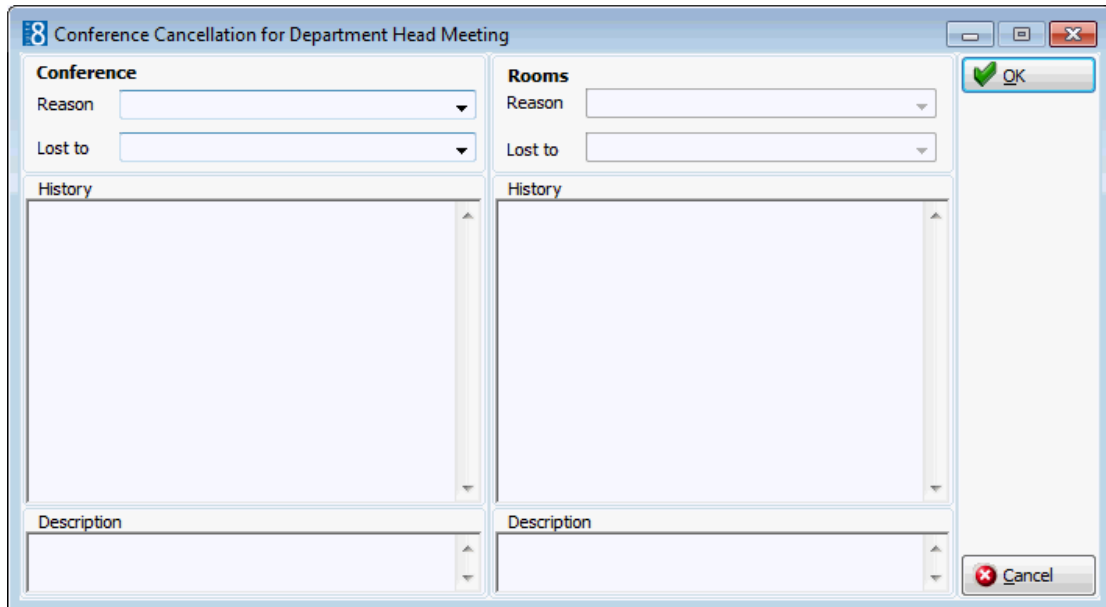
Note: Deleting a booking master is user right dependent. Deletion of a booking master is not allowed if the CCM Info Board Interface is active.

Cancelling a Booking Master

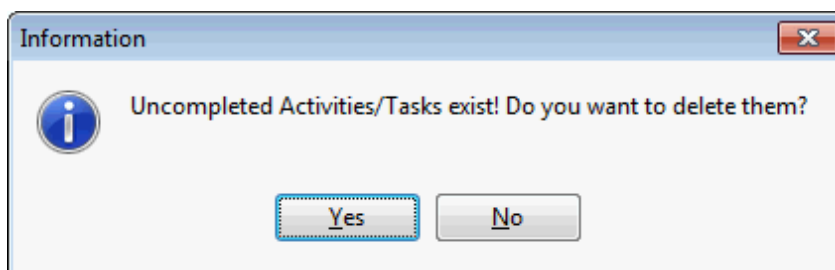
If a booking is to be cancelled then the status of either or both the conference and the rooms must be changed to a cancel status.

How to cancel a booking

1. Display the Booking Master - Booking Information tab.
2. Change either or both the CONFERENCE STATUS and the ROOMS STATUS to a cancel status, the Cancellation dialog box is displayed.



3. In the Conference panel select a REASON for the cancellation.
4. Select a LOST To location if known.
5. Enter a DESCRIPTION if required.
6. Repeat steps 3-5 for the Rooms panel.
7. If the booking has uncompleted activities or tasks then a message is displayed asking if they should be deleted.



8. Click YES to delete the records automatically.
9. If only one status was cancelled then when clicking YES to delete the activities and tasks the Activities & Tasks dialog for this particular booking is displayed and the user can choose which tasks & activities to delete.
10. Click CLOSE.


Note: Completed activities are always kept.


Printing a Function Sheet or other Correspondence


Correspondence can be printed and sent via regular mail or sent via email, as an email attachment or by fax from within the Meeting Planner module.


The PRINT option opens the print dialog window. The screen is split into three sections.


- Printing functionality is controlled by the first section is to choose a template from a list of predefined Templates, to select a language for the correspondence and to select if the correspondence should be saved. Letter and form templates can be created in Miscellaneous → Reports with the section role Conference.
- The second section is the PROFILES section and contains information about the profiles linked to the booking. The DETAILS section displays all the addresses from all the profiles linked to the booking. The primary address of the selected profile and the preferred communication type are selected. If there are several profiles attached, you can select which profile the correspondence should be sent to. You also have the option to select another profile, if for some reason you need to send the correspondence to a different address other than the reservation profile or linked profiles, click the PROFILE SEARCH button to activate profile search. Any profiles linked to the booking can be edited by pressing the EDIT PROFILES button.
- The third section gives information about the History of sent correspondence for this booking. The template name and the print date are displayed. If a letter was edited and saved but not printed then the template name will be displayed with (Saved) after the name and the date and time it was saved.

 Default email subjects can be defined via the option DEFAULT EMAIL SUBJECTS under Setup → Configuration → Miscellaneous → Simple Custom Text.

 Default email body text can be defined via the option EMAIL BODY DEFAULT under Setup → Configuration → Miscellaneous → Simple Custom Text.

 The maximum size for email attachments is defined via the option MAX. EMAIL ATTACHMENT SIZE (MB) under Setup → Configuration → Global Settings → Reports → Reports tab.

 Family functionality is controlled by the parameter ENABLE FAMILY WIZARD under Setup → Configuration → Global Settings → Profile → Profile 1 tab.

 Print functionality is controlled by the user right PRINT under Setup → Configuration → Users → User Definition → Rights → Booking Master.

How to print correspondence

1. Select the appropriate booking in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the SAVE REPORT check box if the document should be saved in history.
6. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
7. Select the CONTACT and ADDRESS information to be used in the document.

-
8. Click EDIT, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
 9. Make sure that all the entered information is correct; any necessary changes can be made at this time.
 10. At this point the letter can be printed or saved to be printed at a later time.
 11. To print the letter, click the PRINT icon or select PRINT from the file menu.
 12. Close the edit screen, if changes were made you will be prompted to save the changes.
 13. If using MS Word as the editor, click EXIT to close the application.
 14. If the document was edited and saved but not yet printed then the template name will be displayed with (Saved) after the name and the date and time it was saved in the history section of the Print dialog box.
 15. If the document was printed then the template name will be displayed and the date and time it was printed in the history section of the Print dialog box.

How to print saved correspondence

1. Select the appropriate booking in the grid; click the PRINT button to display the Print dialog box.
2. Select the document to be printed from the list of templates in the HISTORY section of the screen.
3. Click EDIT HISTORY, the letter is displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
4. Make sure that all the entered information is correct; any necessary changes can be made at this time.
5. Click the PRINT icon or select PRINT from the file menu to print the letter.
6. Close the edit screen.
7. If using MS Word as the editor, click EXIT to close the application.
8. The document template name will be displayed and the date and time it was printed in the HISTORY section of the Print dialog box.

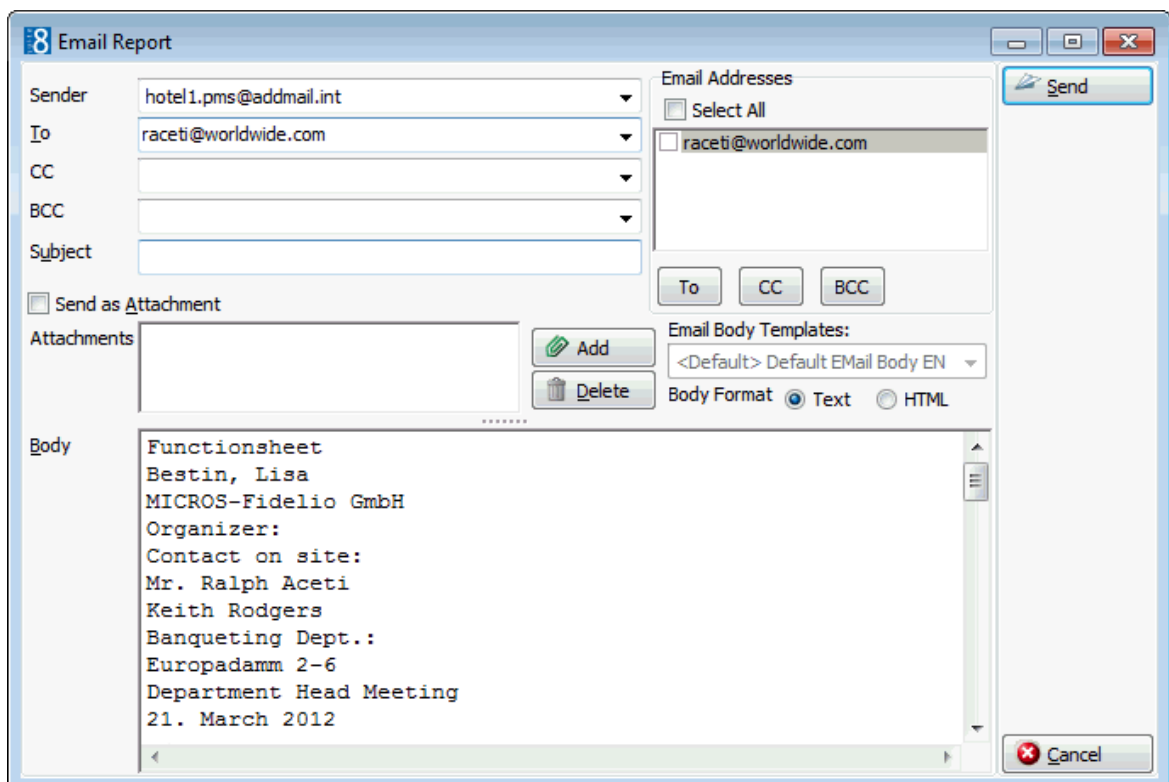
How to preview a document

1. Select the appropriate booking in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the SAVE REPORT check box if the document should be saved in history.
6. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
7. Select the CONTACT and ADDRESS information to be used in the document.
8. Click PREVIEW, the document is generated and displayed on the screen.

9. At this point the document can be printed or saved to be printed at a later time.
10. To print the document, click the PRINT icon.
11. To save the document, click the SAVE icon, enter a file name to save the document.
12. Click SAVE.
13. Close the preview screen.

How to email correspondence

1. Select the appropriate booking or event in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the SAVE REPORT check box if the document should be saved in history.
6. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
7. Select the CONTACT and ADDRESS information to be used in the document.
8. Click EMAIL, the document is generated and the email dialog box displayed.

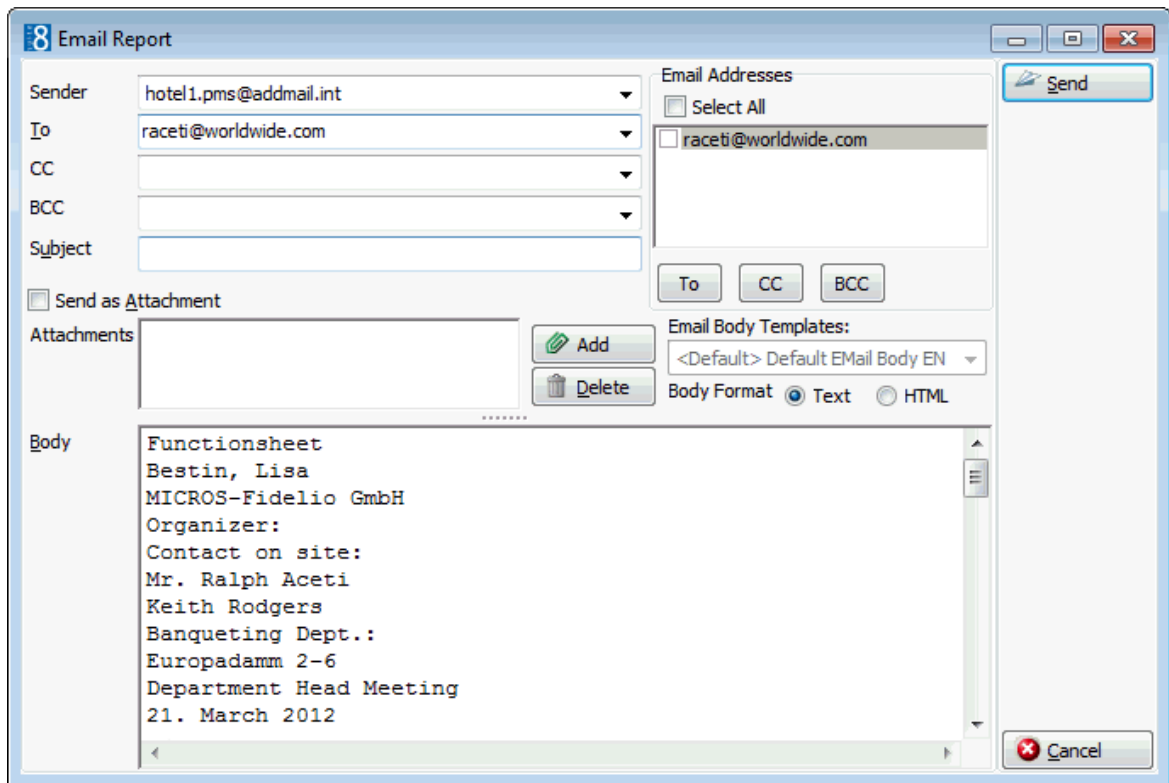


-
9. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
 10. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
 11. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.
 12. Enter the topic of the email in the SUBJECT box. If a default email subject has been defined, then this will be displayed.
 13. In the BODY box make sure that all the entered information is correct, any necessary changes can be made at this time.
 14. If the email should be saved and sent later then click SAVE DRAFT, the email is saved and the template name is displayed with (E-Mail)(Saved) after the name and the date and time it was saved in the history section of the Correspondence dialog box.
 15. If the email should be sent now click SEND, the document is generated and the email sent.

A confirmation message is displayed confirming that the message was sent.

How to email correspondence as an attachment

1. Select the appropriate booking or event in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the SAVE REPORT check box if the document should be saved in history.
6. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
7. Select the CONTACT and ADDRESS information to be used in the document.
8. Click EMAIL, the document is generated and the email dialog box displayed.



9. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
10. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
11. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.
12. Enter the topic of the email in the SUBJECT box. If a default email subject has been defined, then this will be displayed.
13. Select the SEND AS ATTACHMENT check box if the document should be sent as an attachment rather than in the body of the email.
14. To edit the document click the EDIT ATTACH. button, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
15. In the FORMAT box select the format for the attachment.
16. In the BODY box enter the text which should be included in the body of the email.

17. If the email should be saved and sent later then click **SAVE DRAFT**, the email is saved and the template name is displayed with (E-Mail)(Saved) after the name and the date and time it was saved in the history section of the Correspondence dialog box.

18. If the email should be sent now click **SEND**, the document is generated and the email sent.

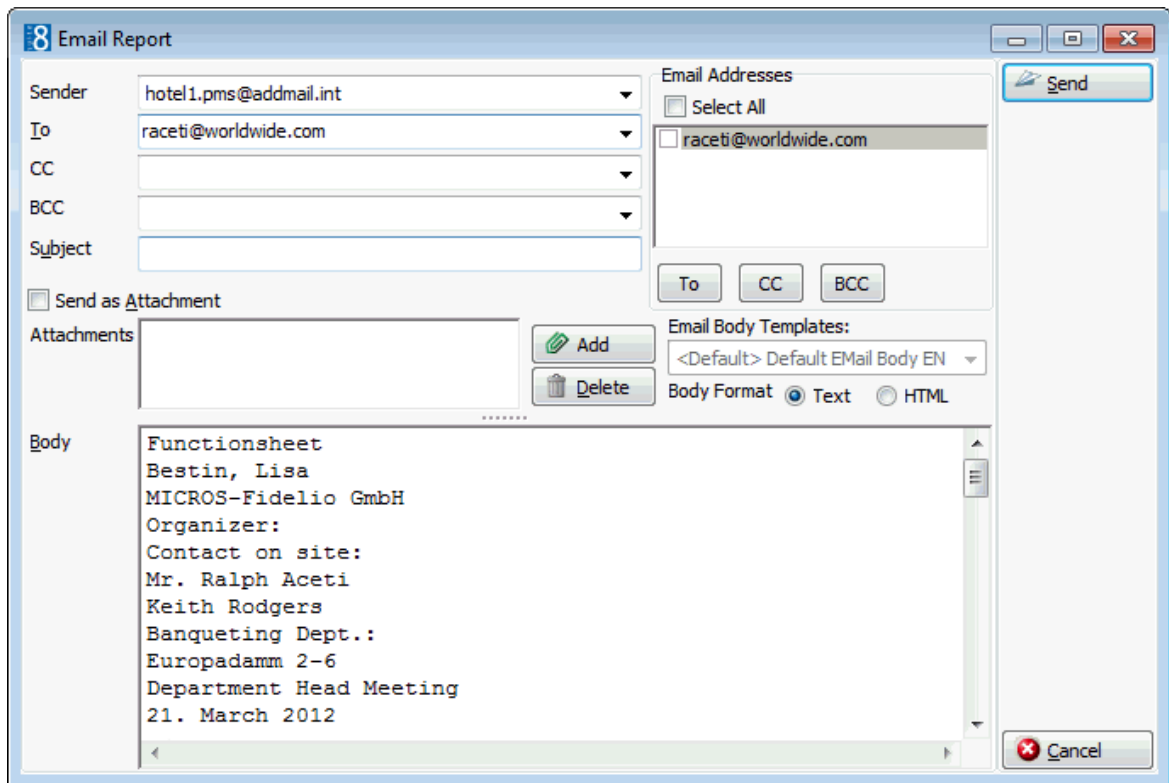
A confirmation message is displayed confirming that the message was sent.

Note: Attachments sent in PDF format are automatically password protected so that no changes can be made to the original PDF.

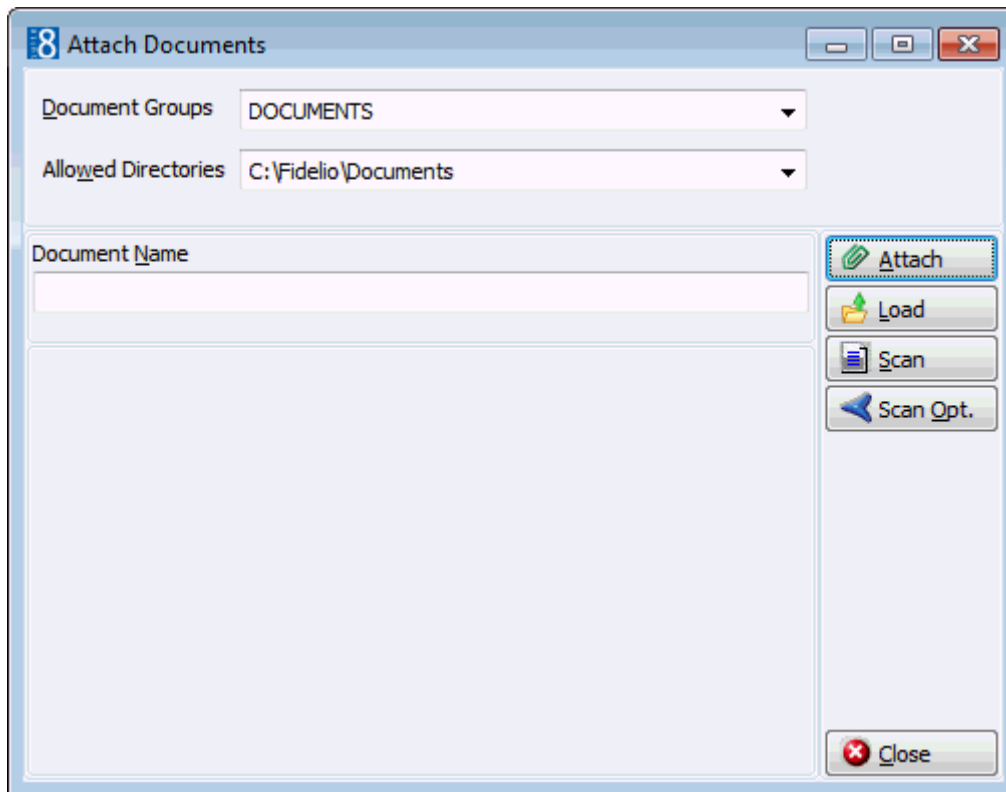
Note: When sending correspondence as a PDF attachment, the PDF files are stored both in the database and in the Mailing Documents directory defined in the configuration. After the correspondence has been successfully sent the PDF files are removed from the database.

How to email correspondence with an attachment

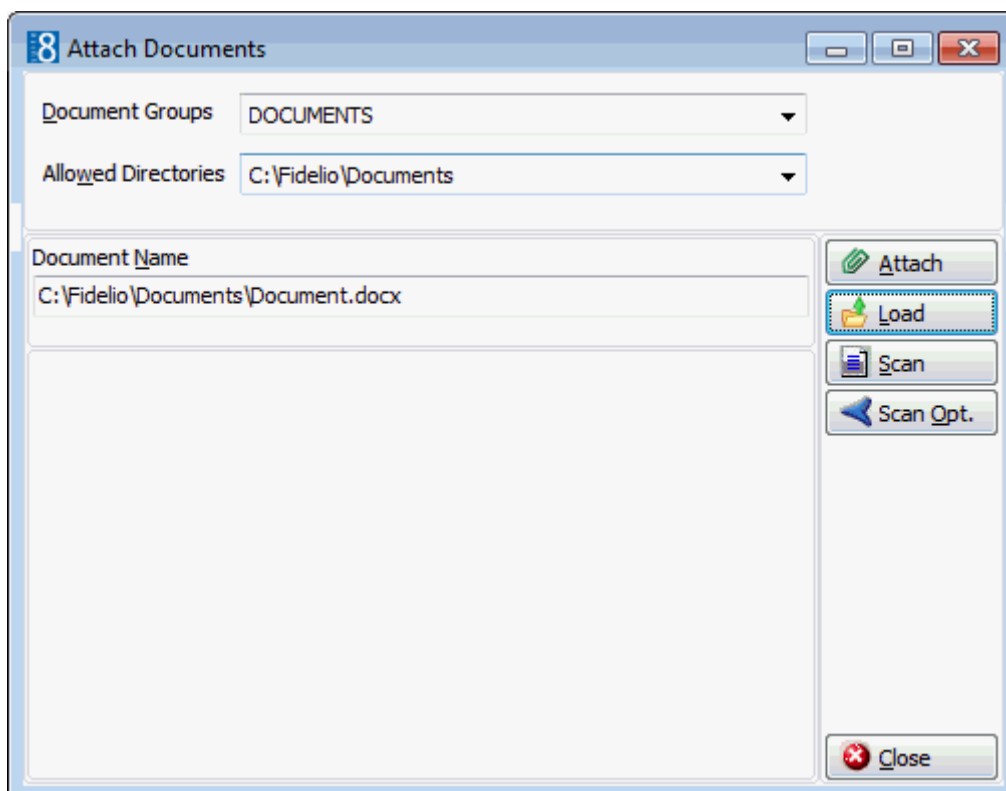
1. Select the appropriate booking or event in the grid; click the **PRINT** button to display the Print dialog box.
2. In the **TEMPLATES** box click the drop-down arrow and select the template to be used.
3. In the **LANGUAGE** box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the **PREF. DISTRIBUTION** box the preferred method of distribution for this profile is displayed. If a company profile is selected then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the **SAVE REPORT** check box if the document should be saved in history.
6. Select the **FAMILY GREETINGS** check box if the family letter greetings should be used.
7. Creating correspondence for an individual profile requires that only the **ADDRESS** be selected as the profile is selected by default. When creating correspondence for a company profile, the primary **CONTACT** and primary **ADDRESS** of the company is selected by default, but can be changed as required.
8. Click **EMAIL**, the document is generated and the email dialog box displayed.



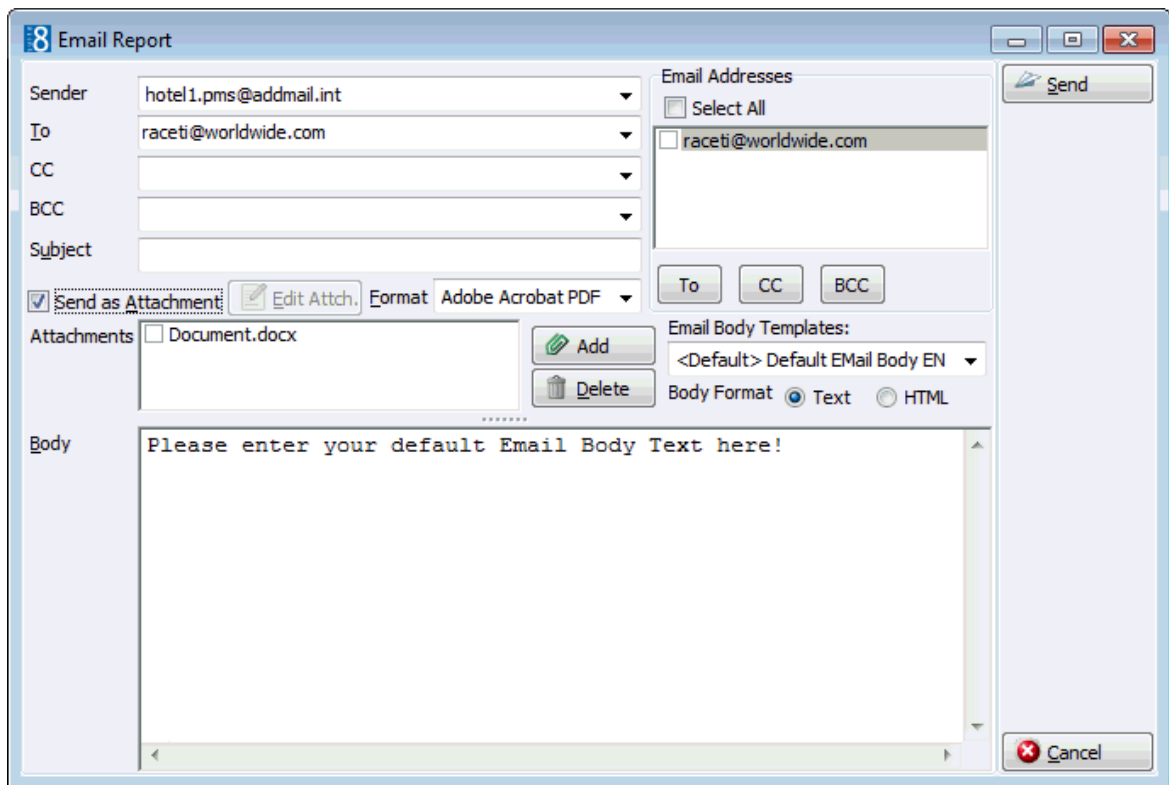
9. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
10. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
11. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.
12. Enter the topic of the email in the SUBJECT box. If a default email subject has been defined, then this will be displayed.
13. Click ADD, the Attach documents dialog box is displayed.



14. In the DOCUMENT GROUPS list, select the document group required.
15. In the ALLOWED DIRECTORIES list, select the allowed directory required.
16. Click BROWSE to display the list of documents.
17. Select the required document and click OPEN, the Document Name field is filled.



18. To attach the document, click ATTACH, the document is shown as a linked attachment on the email report dialog box.



19. In the BODY box, make sure that all the entered information is correct; any necessary changes can be made at this time.
20. If the email should be saved and sent later then click SAVE DRAFT, the email is saved and the template name is displayed with (E-Mail)(Saved) after the name and the date and time it was saved in the history section of the Correspondence dialog box.
21. If the email should be sent now click SEND, the document is generated and the email sent.

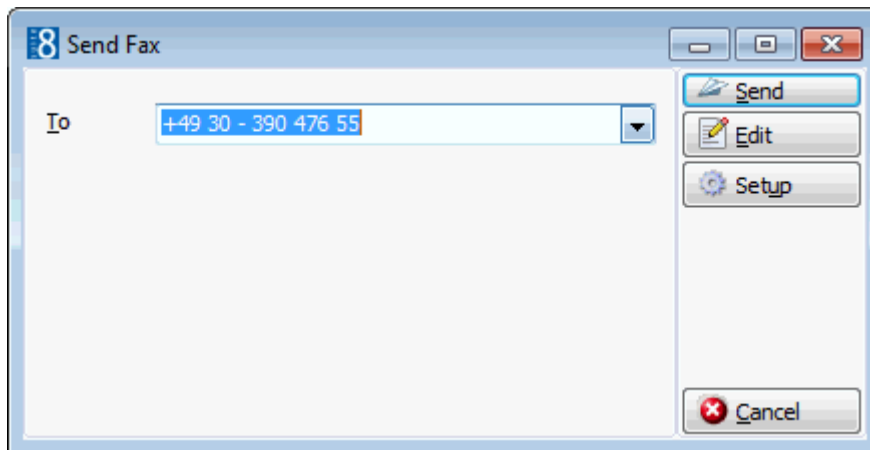
A confirmation message is displayed confirming that the message was sent.

How to email saved correspondence

1. Select the appropriate booking or event in the grid; click the PRINT button to display the Print dialog box.
2. Select the email to be sent from the list of templates in the HISTORY section of the screen.
3. Click E-MAIL HISTORY, the email is displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the email.
4. Make sure that all the entered information is correct; any necessary changes can be made at this time.
5. Click SEND, the document is generated and the email sent.
6. The document template name is displayed and the date and time it was sent in the HISTORY section of the Correspondence dialog box.

How to fax correspondence

1. Select the appropriate booking or event in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the SAVE REPORT check box if the document should be saved in history.
6. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
7. Select the CONTACT and ADDRESS information to be used in the document.
8. Click FAX, the document is generated and the fax dialog box displayed.

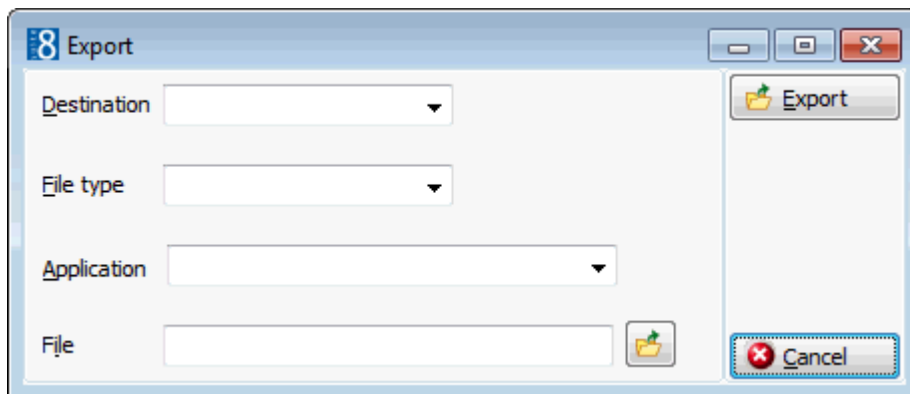


9. The To box is automatically completed with the fax number from the profile.
10. To edit the fax click EDIT, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
11. Make sure that all the entered information is correct; any necessary changes can be made at this time.
12. To schedule the time the fax should be sent, click ADVANCED, the Fax Scheduler dialog box is displayed.
13. Select when to SEND THE FAX, the default is NOW, to specify a specific date and time select a SPECIFIC TIME IN THE DAY and enter the date and time to send the fax.
14. Select the FAX PRIORITY, the default is Normal.
15. Click OK.
16. Click Send, the document is generated and the fax sent.

How to export correspondence

1. Select the appropriate booking or event in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.

3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the SAVE REPORT check box if the document should be saved in history.
6. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
7. Select the CONTACT and ADDRESS information to be used in the document.
8. Click EXPORT, the document is generated and the export dialog box displayed.



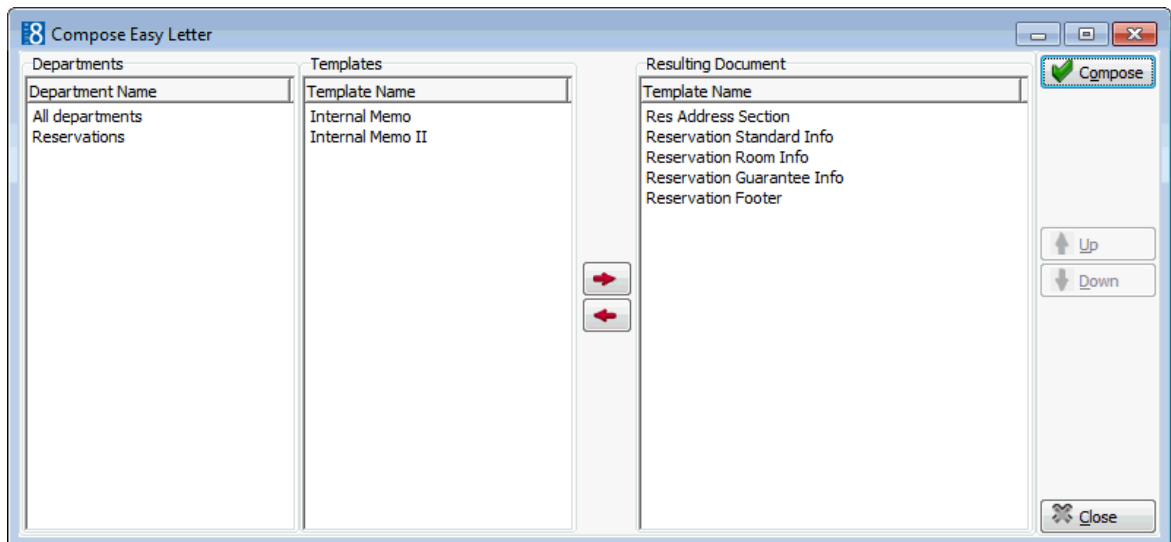
9. In the DESTINATION box, click the drop-down arrow and select if the document is being exported to a file or to an application, such as MS Word or MS Excel.
10. In the FILE TYPE box, click the drop-down arrow and select the file type to be used for the export. One of the most commonly file types is Rich Text Format as it allows editing of the document whilst keeping the correct formatting.
11. This option is only available if TOAPPLICATION was selected as the Destination type. Click the drop-down arrow and select the application type.
12. The FILE box is automatically completed with a file name taken from the reports section, but can be changed as required. To select a different file, click the folders button.
13. Click EXPORT, the document is generated and exported.

How to create an easy letter

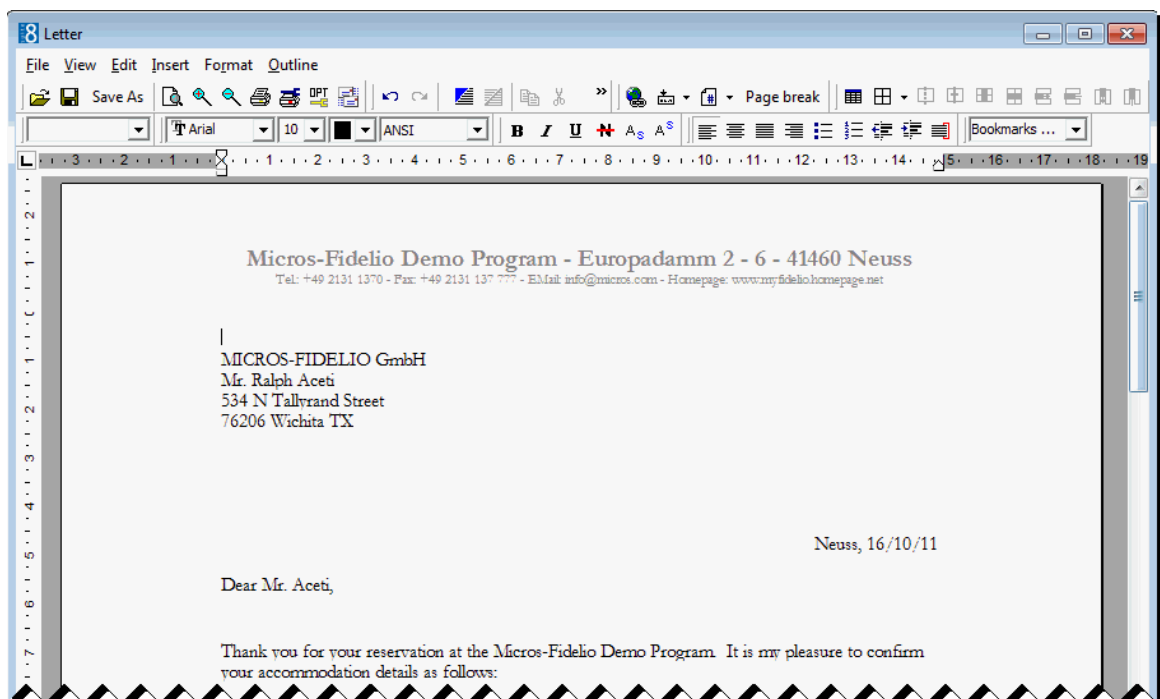
1. Select the appropriate booking in the grid; click the PRINT button to display the Print dialog box then click EASY LETTER.

The Compose Easy Letter screen is split into 3 sections:

- Departments - lists the available departments; ALL DEPARTMENTS lists all available templates.
- Templates - lists the available templates; templates are displayed according to the selected department.
- Resulting Document - lists the templates which are selected by default.



2. Select the required department from the DEPARTMENTS list; the templates belonging to the selected department are displayed in the TEMPLATES list.
3. Select the required template from the list of available TEMPLATES; click the arrow button to move the template to the RESULTING DOCUMENT window on the right.
4. Repeat step 3 for all the required templates. The order of the templates may be changed using the UP and DOWN arrows.
5. Click the COMPOSE button to display the Internal Editor screen.



6. Make any additions or changes to the letter as required.
7. To print the letter, click FILE then PRINT.
8. To email the letter click FILE then E-MAIL.
9. To save the letter click FILE then SAVE AS.
10. Allocate a FILE NAME, choose the location to save the letter and click SAVE.
The letter is saved in RTF format.

12. Click FILE then CLOSE to exit the Internal Editor.

Events

This option is used to add new events to a booking master; typical examples of events are meeting, conference, lunch, dinner or coffee breaks. Everything that gets booked to an event is known as a resource, for example, the actual function space, miscellaneous items such as decoration and technical equipment, and the food and beverage items.

When a new event is entered the function space is selected and this is automatically added to the event resources. All other items such as decoration, and food and beverage items must be added separately.

If Alternative functionality is active then alternative events can be defined; this enables the customer to reserve alternatives and make a final decision at a later date, for example, Dinner may be booked and Lunch reserved as an alternative.

The first booked event cannot be set as an alternative as there are no other events for it to be an alternative to. When at least one event exists then the ALTERNATIVE option and the alternative selection box are displayed. The Alternative option can be selected without selecting a specific alternative or a specific alternative can be selected from the list of already booked events.

How to access the event details

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.

Event Details of booking Department Head Meeting - 21/03/12 (Booking ID: 1031)

Company Name: MICROS-Fidelio GmbH
 Contact Name: Aceti, Ralph
 Contact on site: Bestin, Lisa
 Booking Name: Department Head Meeting
 Catering Status: DEF Start / End Date: 21/03/12 - 21/03/12 ID: 1031
 Financial Account: 11

Pkg	Start / End Date	Start / End Time	Status	Event Name	Notes	Pax	Function Space	Seating	Pkg
✓	21/03/12 -- 21/03/12	9:00 AM -- 6:00 PM	DEF	Meeting		14			CP2
	21/03/12 -- 21/03/12	9:00 AM -- 11:30 AM	DEF	Meeting		14	Room I	Boardroom	
✓	21/03/12 -- 21/03/12	10:00 AM -- 10:30 AM	DEF	Coffee break in the ...		14	Foyer < S >	Top Tables	CP2
✓	21/03/12 -- 21/03/12	12:00 PM -- 2:00 PM	DEF	Lunch		14	Restaurant < S >		CP2
✓	21/03/12 -- 21/03/12	3:30 PM -- 4:00 PM	DEF	Coffee break in the a...		14	Foyer < S >	Top Tables	CP2

PKG	Resource	Seating/Attribute /	Quantity	Gtd.	Currency	Code	Price	Forecast	Attributes	Notes	External	Unavailable	Posted
✓	Flipchart with paper & pens		1		EUR								
✓	Screen (1.80 x 180m)		1		EUR								
✓	Overhead Projector		1		EUR								
✓	Conference paper & pencils				EUR								
✓	2 conference drinks		14	14	EUR								

The screen is divided into 3 distinct areas:

- The upper section displays information from the booking master.

As soon as a package and/or event group has been booked the option GROUP BY PACKAGE/EVENT GROUP is displayed. Selecting this option groups the events by package or by event group, individual events are still sorted in date order.

If a conference package has been booked then the PACKAGE search field is displayed and can be used to display a list of the events belonging to the package.

If an event group has been booked then the Ev. GROUP search field is displayed and can be used to display a list of the events belonging to the package.

- The middle section displays information about the event, such as start and end times, event type and seating arrangement.

An event which is part of a conference package is indicated by a green tick mark in the PKG/GRP column and the package name is listed in the PKG column.


An event which is part of an event group is indicated by a blue tick mark in the PKG/GRP column and the event group name is listed in the Ev. Grp column.


In order to easily see the events which belong to a specific day; events are grouped by day and the days are coloured alternately yellow and white.

- The lower section displays information about Resources and Forecast/Revenue details, each represented by a separate tab.

Note: The order of events within the same day can be changed by selecting the event and moving up or down on the grid as required.

Note: The event order cannot be changed if the option GROUP BY PACKAGE/EVENT GROUP is activated.

 Event groups functionality is controlled by the parameter USE EVENT GROUPS under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

 Alternative functionality is controlled by the parameter USE ALTERNATIVES under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

New Event

How to enter a new event

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Click NEW, the New Event screen is displayed.

8 New Event for booking Department Head Meeting - 21/03/12 (Booking ID: 1031)

Event

Company Name: MICROS-Fidelio GmbH
 Contact Name: Aceti, Ralph
 Contact on site: Bestin, Lisa
 Booking Name: Department Head Meeting

Event Information

Event Status: DEF/Definitive
 Event Type:
 Event Name:
 No. of Attendees: 14 Min. Guarantee:
 Start Date: 21/03/2012 End Date: 21/03/2012
 Start Time: End Time:
 Alternative

Info Board:
 Info Board Profile:
 Incl. in Package
 Noisy
 Block

Function Space Information

Function Space:
 Seating Arr.:
 Rate: Amount:
 Dept. Code:
 Rebate: % Flat
 Special Rate Don't Move Incl. in Package
 Alternative

Setup Time:
 Setdown Time:
 Cost Price:

Expected / Forecast Information

Department Code	Curr	Expected Per Pers.	Expected Flat Rate	Expected Total	Forecast	Net	Tax

OK
 Table Res
 Cancel

5. Complete the options as detailed in the Event dialog box table below.
6. Click OK to save the event.

The event is now listed in the event details screen.

Note: If a new event is being entered on a day where an event with a package already exists then the user will be asked "Is this event included in the package?"

Note: If the same time is entered for an event start time and end time, then the end date of the event is changed to the next day. There must be a difference of at least 1 minute between the start and the end time of an event in order to display the function space in the diary and to check the availability of miscellaneous items.

Event dialog box

Field Name	Explanation
Event Information	
Event Status (Required)	The event status field will be filled automatically with the status entered under conference status on the booking master. It can be changed if required by selecting the status for this particular event from the drop down list.
Event Type (Required)	Select the event type from the drop down list. When selecting the event type the event name will be filled in automatically with the definition entered under Setup → Configuration → Conference Management → Event Type. It can be changed if required. If the event types have been defined with default forecast figures under Setup → Configuration → Conference Management → Event Defaults, the forecast/revenue information at the bottom of the event edit screen will be filled as well.
Event Name (Required)	The name of the event will be filled automatically after the event type has been selected. It can be changed at any time.
No of Attendees (Required)	The number of attendees for the event. The number of attendees entered will be taken for several checks, for example function space and seating arrangement check.
Min Guarantee	Enter the minimum number of guaranteed persons. This number is normally taken for billing even if less should turn up for the function.
Start Date	The start date is filled automatically with the system date if it is within the range of the arrival and departure dates. Future bookings will default to the arrival date of the booking master. It is not possible to create an event that is not within the arrival and departure date of the booking. Note: The entering of an arrival date in the past is controlled by the user right ENTERING BOOKINGS IN THE PAST.
End Date	The end date is filled automatically with the end date of the booking master. It is not possible to create an event that is not within the arrival and departure date of the booking.
Start Time	If the event type has been configured with default start time, then it is filled in automatically, but can be changed by entering a time or selecting one from list box. If the event was booked through the conference diary then the start time is taken from the diary.
End Time	If the event type has been configured with default end time, then it is filled in automatically, but can be changed by entering a time or selecting one from list box. If the event was booked through the conference diary then the end time is taken from the diary. Note: If an event finished past midnight, the end date has to be changed to the next day.
Alternative	Select this option to reserve an alternative event; select a specific alternative event from the list of reserved events. NOTE: This option is only displayed when at least one other event has been reserved.

Info Board	Enter the information that should be placed on the info board outside the function space such as "Fidelio Software – Dealer Conference".
Info Board Profile	Mainly used in conjunction with the doorcard interface, this option allows the property to enter a different name. For example, the booking was made by Star Conferences for the company IBM; so on the doorcard IBM should be displayed. The handling is such that when a company and a contact are entered the entry in the field Info Board Profile replaces the company, if only a contact is entered the entry in the Info Board Profile replaces the contact. If no entry is made in the Info Board Profile then the company/contact name from the booking will be displayed.
Incl. in Package	Check this box to define if the event is included in a conference package. The field is only accessible if a conference package has been booked for this day.
Noisy	Select this box to indicate that the event will be a 'noisy' one such as a dinner party with live music playing. If the noisy flag has been set, users can also see the indication in the conference diary.
Block	This is a view only field and shows the start time and the end time the function space is blocked for. This is setup time plus event start time and event end time plus set down time. This is completed automatically if a room block with a block code is attached.
Event Group	If this event is part of an event group then the event group name is displayed.
Function Space Information	
Function Space (Required)	Select the function space from the list of defined function spaces. If a shareable function space is linked to the event type selected, this will be displayed automatically, but may be changed as required.
Shareable	This option is displayed on function spaces which are defined as shareable.
Seating Arrangement	Select the seating arrangement from the drop-down list. In some cases the seating arrangement might already be filled in, i.e. if the parameter flag: MULTIPLE FUNCTION SPACES PER EVENT has been activated under Setup → Configuration → Global Settings → Conference tab.
Rate	Select the rate from list box of defined rates, such as full day or half day. The rate codes are defined under Setup → Configuration → Conference Management → Function Spaces → Rate Codes. In some cases the rate might already be filled in, i.e. if the parameter MULTIPLE FUNCTION SPACES PER EVENT has been activated under Setup → Configuration → Global Settings → Conference tab.
Amount	The amount is filled with the rate entered under Setup → Configuration → Conference Management → Function Space Definition → Rates tab. It is also possible to change this amount with a special rate. The special rate field will be checked if this is the case.


	The amount displayed here is the amount being charged after the discount has been applied.
Dept Code (Required)	The department code. In order to use the posting functionality, every resource item has to have a department code assigned. This can be done via the configuration part. The field is filled automatically with the department code entered on the function space definition.
Special Rate	If a different rate has been entered in the amount field, this field will indicate the change with a tick mark.
Rebate % Flat	Defines whether the rebate calculation is by percentage or by flat rate and the percentage or flat rate amount to be used.
Orig. Amount	Displays the amount being charged according to the selected rate code. It is also possible to change this amount with a special rate. The special rate field will be checked if this is the case.
Setup Time	If the seating arrangements have been defined with default setup time, the default values will be filled in automatically, but can be changed at any time.
Set down Time	If the seating arrangements have been defined with default set down time, the default values will be filled in automatically, but can be changed at any time. Please note that the function space will be booked from the event start until the event end time including the defined setup and set down time.
Don't Move	This field should be marked if a customer insists on a particular function space. If this field is selected users will also see the indicator in the conference diary.
Incl. in Package	The field is only accessible if a conference package has been booked for this day.
Cost Price	Displays the cost price for the function space.

Function Space Selection List

Field Name	Explanation
Function Space name	Enter the name of the function space if known.
Available	Select this radio button to show only those function spaces that are available on the booked date during the entered start/end times.
All	Select this radio button to show all function spaces. Function spaces that are not available will be highlighted in red.
Select	Click this button to select the highlighted function space.
Details	Click this button to view the configuration information such as measurements, rates or seating arrangements. If a picture of the function space is available then this can be viewed by selecting the EXTRA INFO tab.



The entering of bookings and events in the past is controlled by the user right ENTER BOOKINGS IN THE PAST under Setup → Configuration → Users → User Definition → Rights → Booking Master.

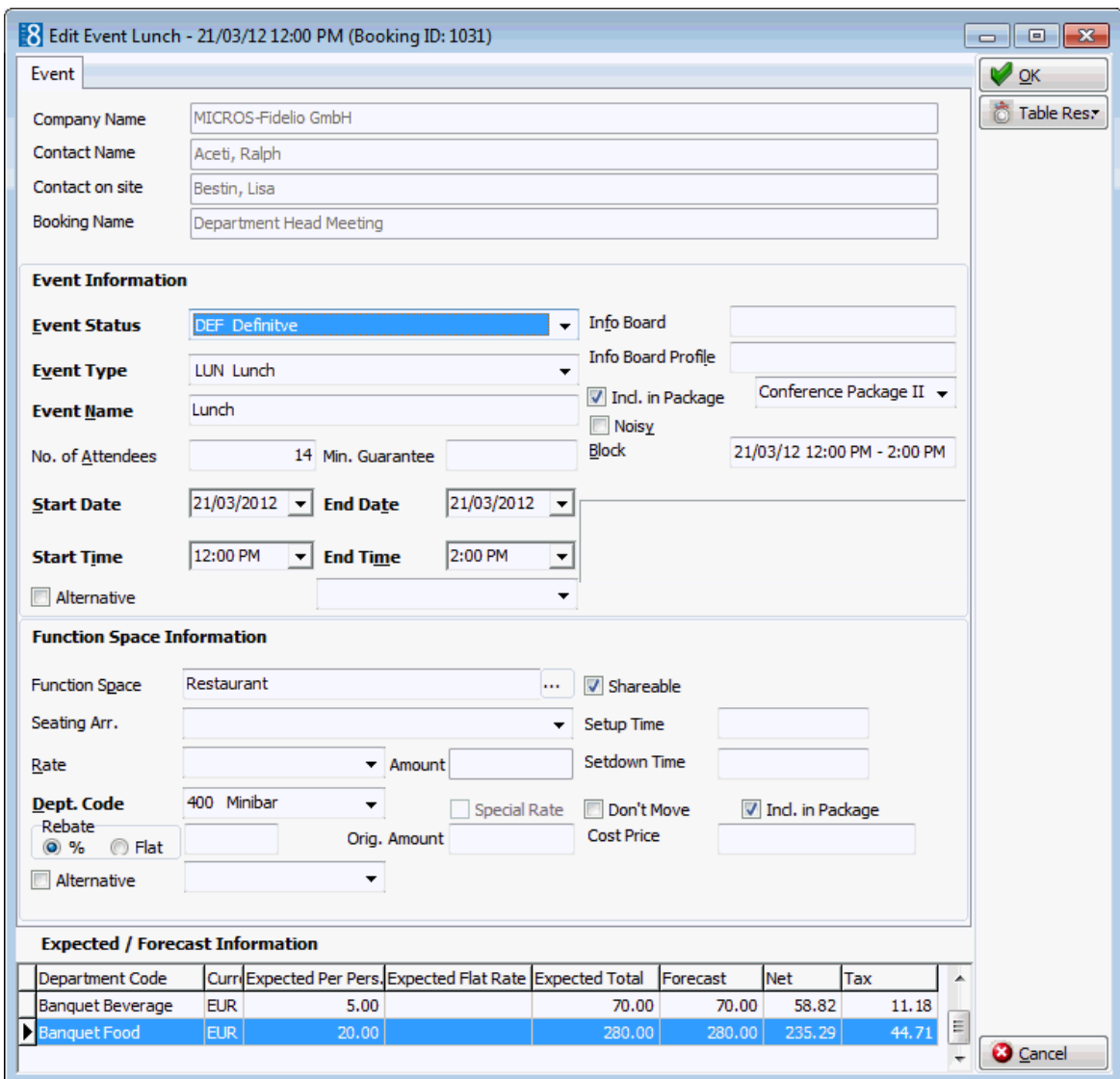
-  Alternatives functionality is controlled by the parameter USE ALTERNATIVES under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

Editing Events

An event can be edited and adjustments made, such as changing the start/end time, the number of attendees, the seating arrangement or changes to the info board.

How to edit an event

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click EDIT, the Edit Event screen is displayed.



Event

Company Name: MICROS-Fidelio GmbH
 Contact Name: Aceti, Ralph
 Contact on site: Bestin, Lisa
 Booking Name: Department Head Meeting

Event Information

Event Status: DEF Definitve
 Event Type: LUN Lunch
 Event Name: Lunch
 No. of Attendees: 14 Min. Guarantee:
 Start Date: 21/03/2012 End Date: 21/03/2012
 Start Time: 12:00 PM End Time: 2:00 PM
 Alternative

Function Space Information

Function Space: Restaurant Shareable
 Seating Arr.:
 Rate:
 Dept. Code: 400 Minibar Special Rate Don't Move Ind. in Package
 Rebate: % Flat Orig. Amount:
 Alternative

Expected / Forecast Information

Department Code	Curr	Expected Per Pers	Expected Flat Rate	Expected Total	Forecast	Net	Tax
Banquet Beverage	EUR	5.00		70.00	70.00	58.82	11.18
Banquet Food	EUR	20.00		280.00	280.00	235.29	44.71

5. Make any changes necessary, typical changes would be amending the start/end time, the number of attendees or the seating arrangement.
6. Click OK to save the changes to the event.

Table Res

This option is used to enter a table reservation or list the table reservations which are attached to an event in a function space that is linked to a restaurant.

How to display attached table reservations

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click EDIT, the Edit Event screen is displayed.
5. Click TABLE RES. and then select SHOW LINKED.

The Table Reservation Search screen is displayed; the table reservations attached to the selected booking are listed.

Date	Start	End	Description	# of adults	Children	Name	Restaurant	Tables	Canceled	Seated
31/01/12	12:00	14:00	Description	10	Children	MICROS-FIDELIO Gm...	Restaurant	Tables	Canceled	Seated

6. Several search criteria such as the dates, the booking name and the booking # are completed with details from the booking.
7. Complete any other required search criteria by typing information or selecting information from the available lists.

For an explanation of the search criteria, see the Table Reservation Search Criteria table below.

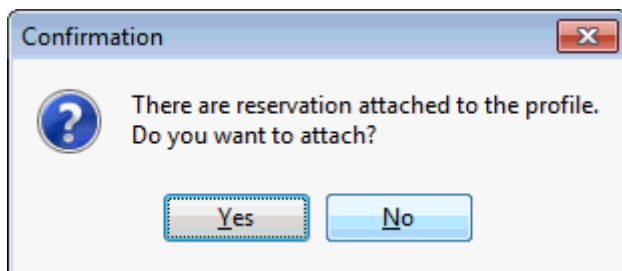
8. Click SEARCH to list the table reservations according to the entered search criteria.
9. Click CLOSE to close the table reservation search screen.

How to enter a new table reservation

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.

4. Select an event and click EDIT, the Edit Event screen is displayed.
5. Click TABLE RES. and then select CREATE NEW.
The Table Reservation Edit screen is displayed.

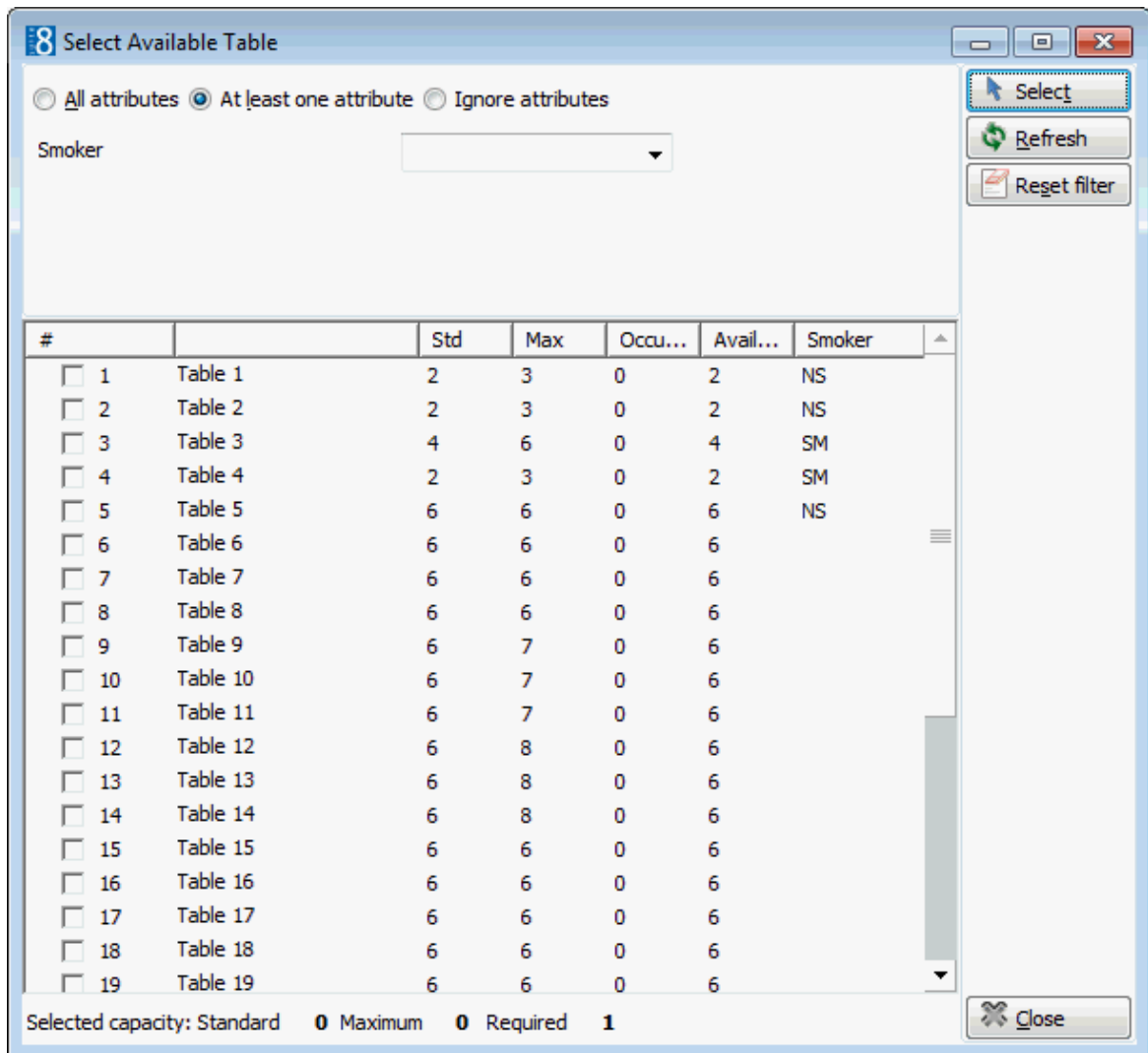
6. The COMPANY and CONTACT profile names from the booking are automatically linked in the PROFILES panel.
7. If the selected profile has a reservation then a message is displayed asking if the reservation should be attached.



8. Click YES to attach the reservation to the table reservation.

If YES was selected then the reservation is now marked as selected in the RESERVATIONS panel.

9. The DATE defaults to the booking arrival date; enter the date for which the table reservation is to be made or select a date from the calendar.
10. Select the RESTAURANT required from the list.
11. In the TEMPLATE box the first available reservation booking time is selected by default. Click the down arrow to select the required reservation booking time.
12. The TIME FROM and TO are completed with the times from the reservation booking template, but may be adjusted as required.
13. If the reservation is being made using a guest profile the # OF ADULTS defaults to NO. OF ATTENDEES as defined in the booking, minus the number for which a table reservation already exists; if the reservation is being made using a reservation then the # OF ADULTS, BABY, CHILD and TEENAGER are taken from the reservation, but maybe changed if required.
14. In the TABLES box, click on the down arrow to open the Select Available Table dialog box.



Multiple tables can be selected if required and tables can be displayed according to attribute type such as smoking or non-smoking.

The standard and maximum number of available seats is displayed for the selected table or tables.


A table number must be selected if the parameter TABLE NUMBER IS MANDATORY is active.

15. Select the required table and then click SELECT.
16. Select the COLOUR in which the table reservation should be displayed in the Table Reservation Availability grid.
17. Enter any additional information in the DESCRIPTION box.
18. Enter information in the TABLE CARD box.
19. Click OK to save the table reservation.

Table Reservation Search Criteria

Fill in this field	With this information
Restaurant	Select a restaurant from the list.
Date to	The dates are completed automatically with the booking arrival and departure dates.
Start time from to	Enter from and to times to limit the search to a specific time period.
Include history	Select this check box to include historical table reservation bookings.
Not Assigned tables only	Select this check box to display only tables which have not been assigned.
Room #	Enter the room number to limit the search to a specific room number.
Booking	Completed automatically with the booking name.
Event	Select an event from the list; all events within the selected dates are displayed.
Last Name	The last name of the guest.
First Name	The first name of the guest.
Description	Enter the text to search for a table reservation with a specific description. The text can be entered using wildcards (%) in order to search anywhere within the description, e.g. %highchair will return reservations with the text 'Highchair required' and also 'Requires a highchair'.
Status	Select a table reservation status from the list, the status DEFINITE is selected by default.
Reservation #	Enter the reservation number to limit the search to a specific reservation.
Booking #	Completed automatically with the booking number.

Note: The table reservation linked to an event can also be listed via the option SHOW ATTACHED TABLE RESERVATIONS on the OPTIONS menu on the event details screen.

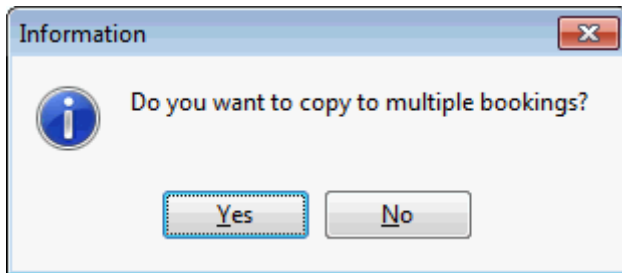
-  Restaurants are linked to a function space via the option RESTAURANTS under Setup → Configuration → Table Reservations.

Copying Events

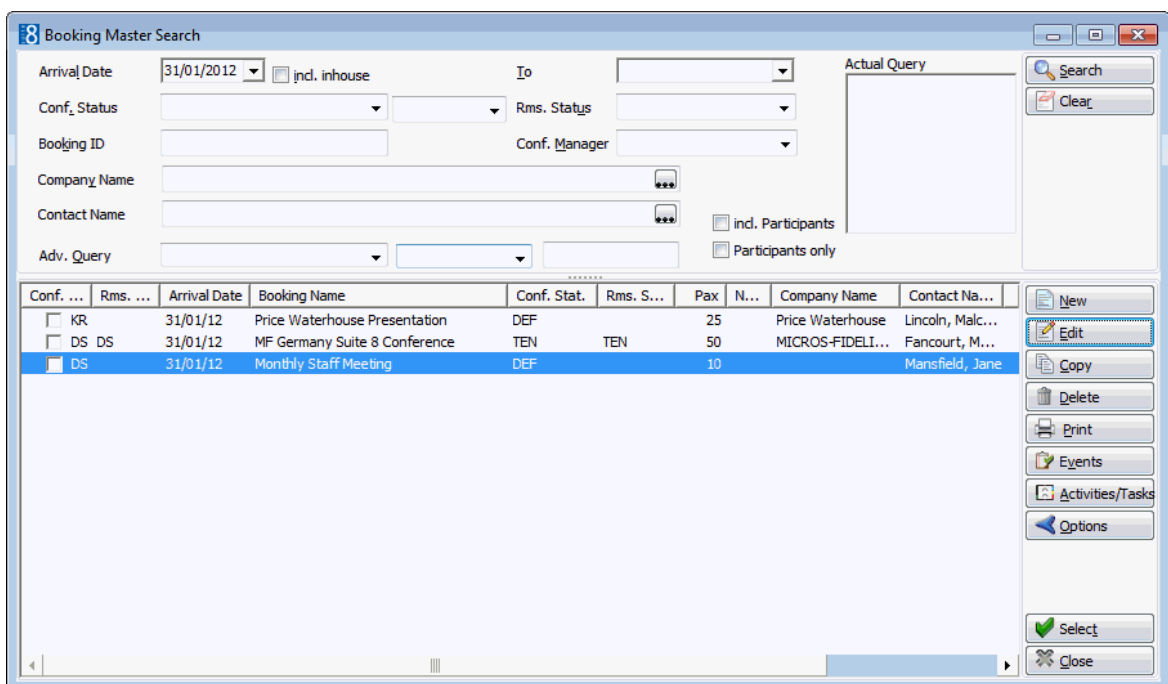
The copy functionality may be used to create several events for the same booking.

How to copy an event

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click COPY, a message is displayed asking if you want to copy the event to multiple bookings.

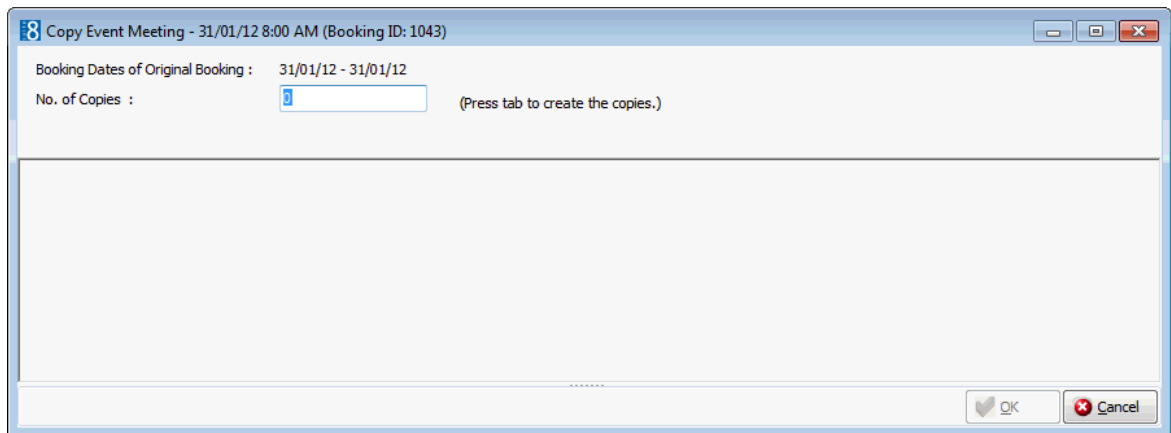


5. Click No to copy the event to a single booking or click YES to copy the event to multiple bookings, if YES is selected then the Booking Master Search screen is displayed.

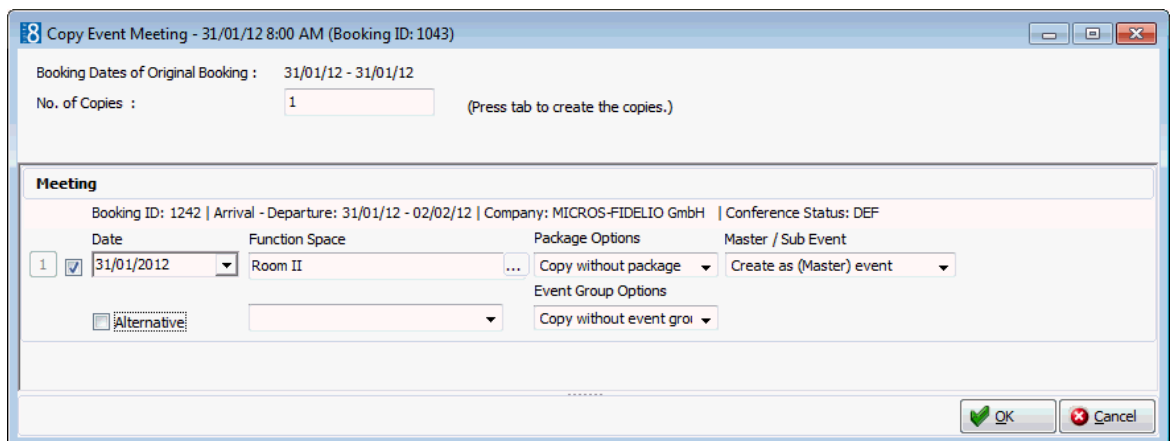


6. Search for and select the check box for each of the bookings the event is to be copied to, click the SELECT button.

The event copy dialog box is displayed.



7. Enter the NO. OF COPIES to be created and press the TAB key to create the copies.
8. The BOOKING DATES of the event are displayed for information purposes at the top of the event copy dialog box. They are the arrival and departure dates of the booking master; it is not possible to make an event copy outside of these dates.
9. Enter the NO. OF COPIES to be made and press TAB, an additional line is added to the event copy screen for each copy required.



10. Type the required date in the DATE box **or** click the drop down arrow and select a date from the calendar.
11. If a different FUNCTION SPACE is required, click the THREE DOTS button to display the Function Space List and select the required function space.
If a different function space is selected but as the same seating arrangement then the seating arrangement is also copied; this applies also to rates and amounts.

Note: The FUNCTION SPACE cannot be changed if the event being copied is a sub-event.

12. In the PACKAGE OPTIONS box click the drop-down arrow and select if the event should be copied with the existing package, without a package or if a new package should be created.
13. If COPY EXISTING PACKAGE is selected then the existing packages are displayed and the user must select the package to copy.
14. In the MASTER / SUB EVENT box click the drop-down arrow and select if the event should be created as a master event or as a sub event.

15. Under the MASTER /SUB EVENT box an additional box is displayed where users can select under which event the sub event should be copied. Original event defines the master event and the New event defines the newly created master event if master and sub event were selected to be copied together.
16. If CREATE AS A SUB EVENT is selected then the original events are listed for selection and the user must select the event for which the copied event will be a sub-event.
17. Select the ALTERNATIVE option to reserve an alternative event; select a specific alternative event from the list of booked events.
18. In the EVENT GROUP OPTIONS box click the drop-down arrow and select if the event should be copied without the event group or if a new event group should be created.
19. Click OK to confirm the copy process, a processing message is displayed.

The required number of events are created.

Note: Checks on the availability of functions space and capacity are performed and will be returned by Suite8 with the relevant messages. If the event being copied was waitlisted and there is now space for the copied event, then a message is displayed asking if you want to change the event status. Answering this message with YES will display the Event Status Change dialog box and the required event status for the copied event can be selected.

Event Copy dialog box

Option	Explanation
Booking Dates	On top of the event copy screen, the arrival and departure date of the booking master is shown. Copies outside those dates are not allowed.
No of Copies	Enter the number of copies that should be made, if the booking runs over several days, the dates for the copied events can be entered into the date box. To exclude a date that has been entered, remove the check mark before the date.
Date	Enter the date required for the event copy.
Function Space	Select the function space required for the event copy.
Package Options	Depending on whether the event should be part of a package or not, the appropriate option can be selected.
Master/Sub Events	This option is only available if the parameter USE MASTER-SUB EVENTS under Setup → Configuration → Global Settings → Conference tab is switched on. If it is turned on, select whether the event should be created as a master- or sub event. In case of a sub event the appropriate master event also has to be selected.
Alternative	Defines if an alternative event should be created. If selected then an alternative event can be selected from the booked events.
Event Group Options	Defines if the event is copied without an event group or if a new event group should be created.

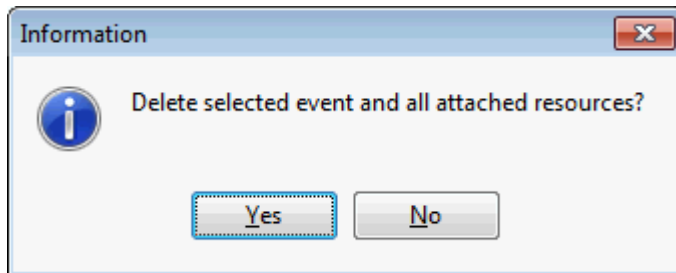


The entering of bookings and events in the past is controlled by the user right ENTER BOOKINGS IN THE PAST under Setup → Configuration → Users → User Definition → Rights → Booking Master.

Deleting Events

How to delete an event

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click DELETE, a confirmation message is displayed.



5. Select YES to delete the event.
6. The event is deleted along with all resources attached to the event.

Note: Multiple events can be selected for deletion using the shift and down arrow keys.

Deleting an event is user right dependent. Deletion of an event is not allowed if the CCM Info Board Interface is active.

All packages attached to the event will also be deleted.

Moving Events

How to move an event

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click EDIT, the Edit Event screen is displayed.
5. In the NAME field click the three dots button to open the Function Space List dialog box.
6. Select the new Function Space and click SELECT.

The Edit Function Space dialog box is re-displayed.

- If the new function space has the same seating arrangement and rate then the seating arrangement and rate are updated automatically, however, the amount is not changed.
- If the original function space had no seating arrangement and rate defined, then no seating arrangement and rate are defined for the new function space and the amount is not changed.

- If the new function space does not have the same seating arrangement and rate defined then the message "Seating or Rate differs! Do you want to change?" is displayed. Confirming this with 'Yes' will fill the default seating arrangement and rate. Confirming with 'No' will leave the seating arrangement and rate blank. The amount is not changed in either case.
- If the new function space has a different seating arrangement the message "Seating or Rate differs! Do you want to change?" is displayed. Confirming this with 'Yes' will fill the default seating arrangement but keep the original rate. Confirming with 'No' will leave the seating arrangement blank and the rate as it was. The amount is not changed in either case.
- If the new function space has a different rate the message "Seating or Rate differs! Do you want to change?" is displayed. Confirming this with 'Yes' will fill the default rate but keep the original seating arrangement. Confirming with 'No' will leave the rate blank and the seating arrangement as it was. The amount is not changed in either case.

7. Click OK to save the changes to the event.

Waitlist Events

If no space is available then events may be added to the waitlist. Events are placed on the waitlist in order of entered events and, as and when space becomes available the events are moved from the waitlist.

The waitlist priorities can be adjusted automatically by selecting the parameter CHANGE WAITLIST PRIORITY AUTOMATICALLY under Configuration → Setup → Global Settings → Conference tab.

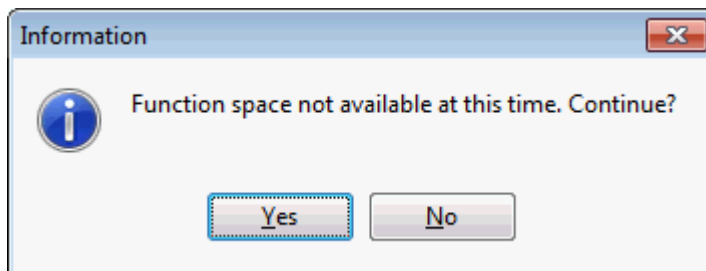
If this parameter is selected users will not be prompted with the message to adjust the waitlist priority, the priority will be set in order of the entered events. As function spaces become available the waitlist priority is adjusted automatically.

Priorities may be adjusted manually however users will be prompted with a warning if they want to change the status of an event with a lower priority.

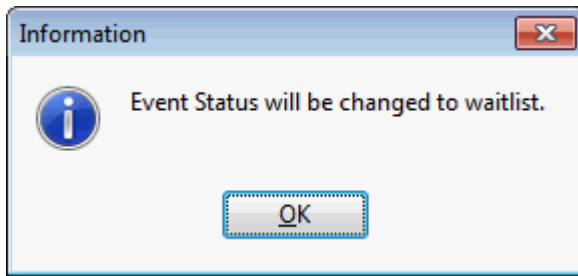
Note: A waitlisted sub-event which is linked to a master event will take the status of the master event

Waitlisting an event in an exclusive function space

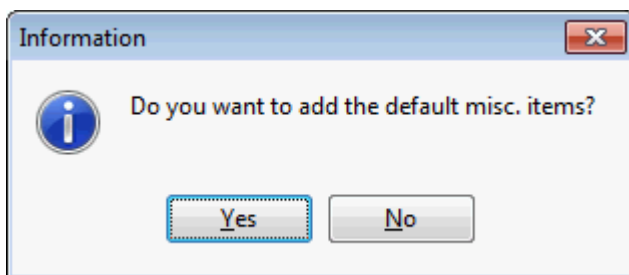
1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING
2. From the Conference Diary screen, place the cursor on the function space, date and time that you want to book.
3. Click and drag the mouse by holding down the left mouse button while dragging the mouse to the right until the required date and time, the command pop-up menu appears.
4. Select CONFERENCE BOOKING, if the function space is already occupied then a message is displayed indicating this with the option to continue or not.



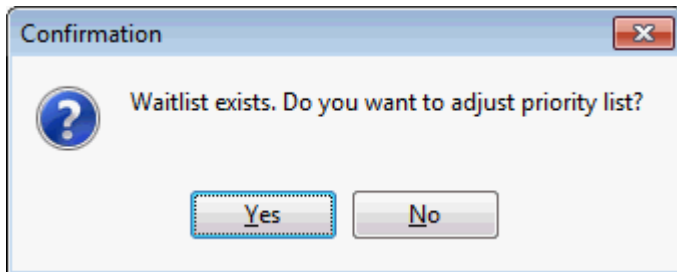
5. Select YES to continue to book the function space, a message is displayed confirming that the Event Status will be changed to waitlist.



6. Click OK, the Booking Master Search screen is displayed.
7. Search for the required booking and select it in the grid.
8. Click the EVENTS button to book the event, the New Event screen is displayed.
9. Complete the Event Information.
10. Click OK; a message may be displayed asking if the default misc. items should be added.



11. Select YES to add the items and No not to add the items.
12. If there is already an event on the waitlist then the following message is displayed:

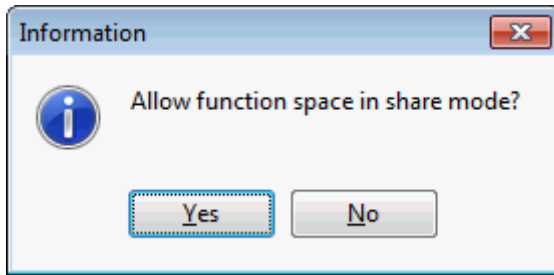


13. Select No if the priority should not be adjusted, then the waitlist priority will be set in order of the entered events.
14. Select YES to adjust the priority list, the Event Waitlist screen is displayed showing all events currently on the waitlist.
15. Use the up and down arrows to adjust the event priority, click OK to close the Event Waitlist screen.
16. The Conference Diary is displayed showing the booked event.

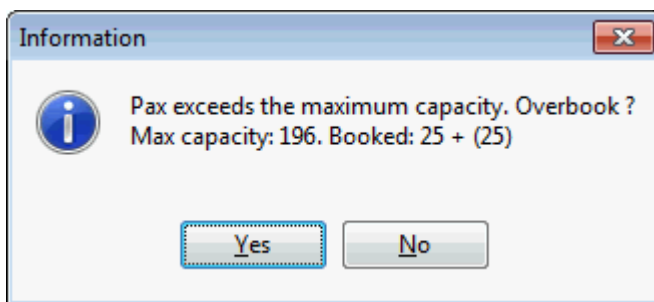
Waitlisting an event in a shareable function space

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY.
2. From the Conference Diary screen, place the cursor on the function space, date and time that you want to book.
3. Click and drag the mouse by holding down the left mouse button while dragging the mouse to the right until the required date and time, the command pop-up menu appears.

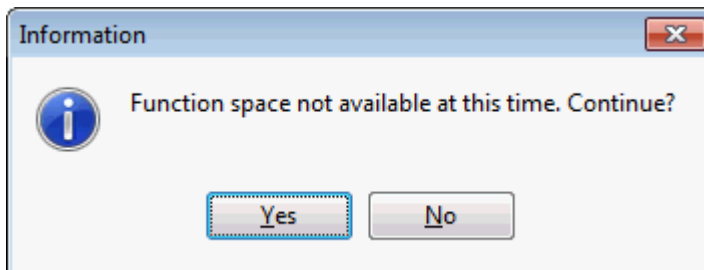
4. Select CONFERENCE BOOKING, the share mode message is displayed.



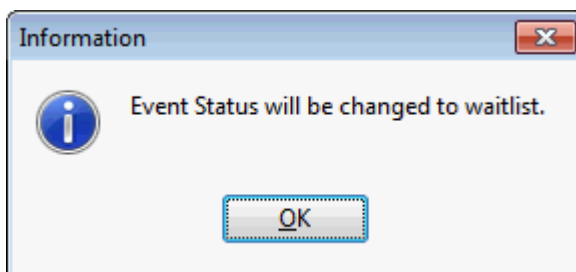
5. Select YES to book the function space as shareable, this allows other groups to be booked into the same function space. Selecting No will book the function space in exclusive mode which will not allow other groups to be booked into the same function space without waitlisting them.
6. If the function space is booked to capacity then a message is displayed indicating this with the option to overbook or not.



7. A further message is displayed indicating that the function space is not available at this time, with the option to continue or not.

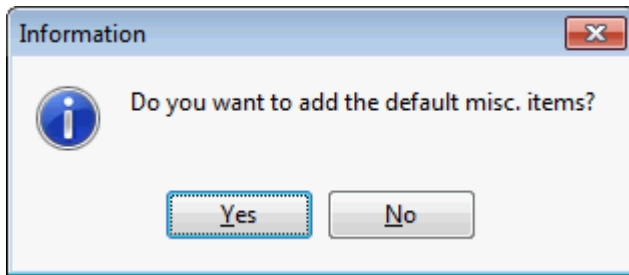


8. Select YES to continue to book the function space, a message is displayed confirming that the Event Status will be changed to waitlist.

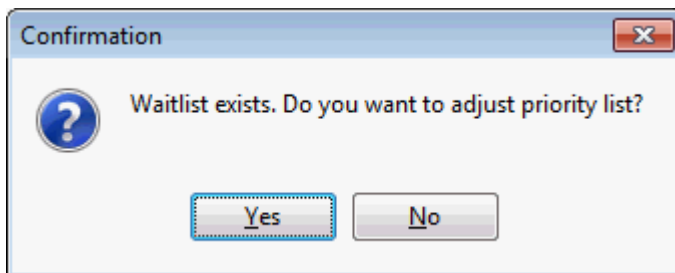


9. Click OK, the Booking Master Search screen is displayed.
10. Search for the required booking and select it in the grid.
11. Click the EVENTS button to book the event, the New Event screen is displayed.
12. Complete the Event Information.

13. Click OK; a message may be displayed asking if the default misc. items should be added.



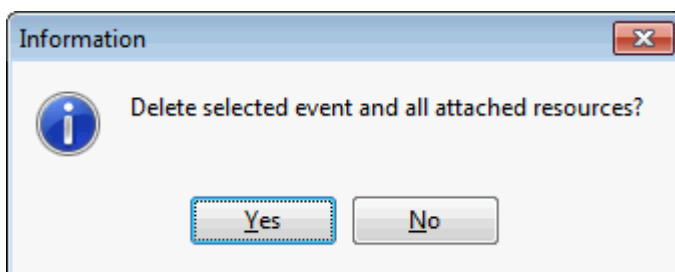
14. Select YES to add the items and No not to add the items.
15. If there is already an event on the waitlist then the following message is displayed:



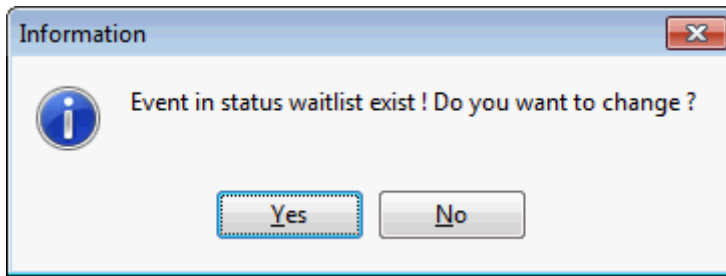
16. Select No if the priority should not be adjusted, then the waitlist priority will be set in order of the entered events.
17. Select YES to adjust the priority list, the Event Waitlist screen is displayed showing all events currently on the waitlist.
18. Use the up and down arrows to adjust the event priority, click OK to close the Event Waitlist screen.
19. The Conference Diary is displayed showing the booked event.

Moving an event from the waitlist when an existing event is cancelled

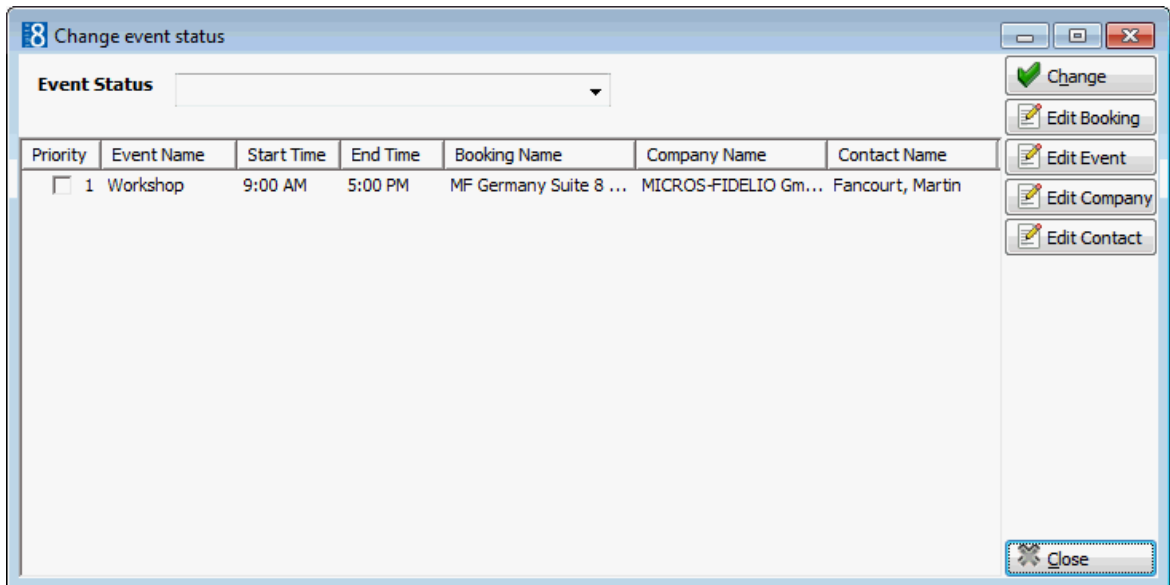
1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select the required booking.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Point to the event to be deleted and click the DELETE button, a confirmation message is displayed.



5. Click YES to delete the event and all attached resources.
6. If events exist on the waitlist for this function space then a message is displayed.



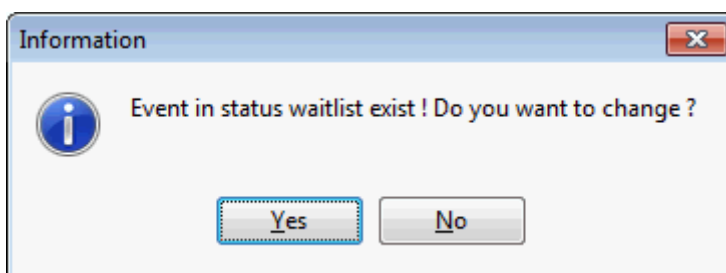
7. Select YES to change event status, the change event status screen is displayed.



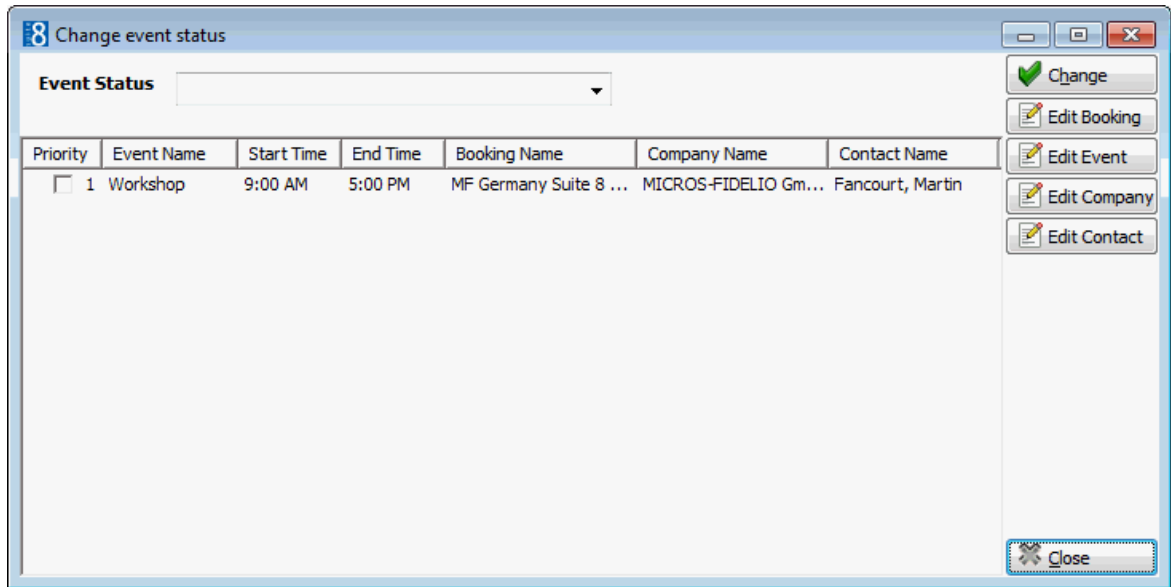
8. Point to the event to have its status changed.
9. Select a new status from EVENT STATUS list box.
10. Click CHANGE to change the status.
11. Click CLOSE to close the change event status screen.

Moving an event from the waitlist when an existing event is reduced in numbers

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select the required booking.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Point to the event to be adjusted and click the EDIT button.
5. Reduce the No. OF ATTENDEES.
6. If enough space has now become available and if events exist on the waitlist for this function space then a message is displayed.



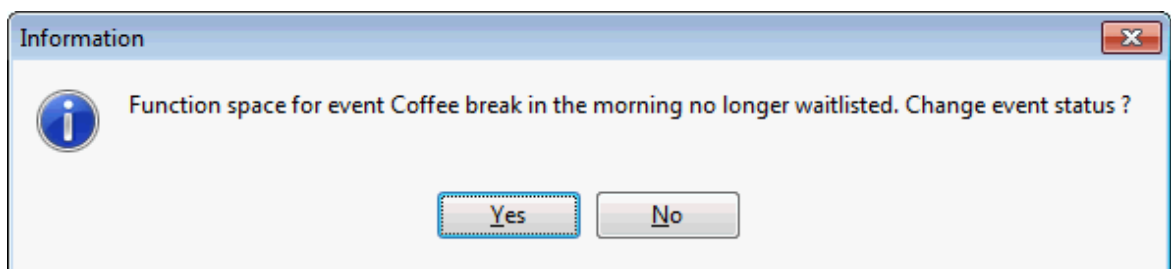
7. Select YES to change event status, the change event status screen is displayed.



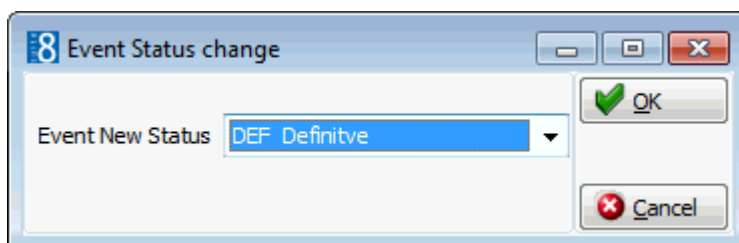
8. Point to the event to have its status changed.
9. Select a new status from EVENT STATUS list box.
10. Click CHANGE to change the status.
11. Click CLOSE to close the change event status screen.

Moving an event from the waitlist when the waitlisted event is reduced in numbers

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select the required booking.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Point to the event to be adjusted and click the EDIT button.
5. Reduce the NO. OF ATTENDEES, if by reducing the numbers the function space has now become available then a message is displayed.

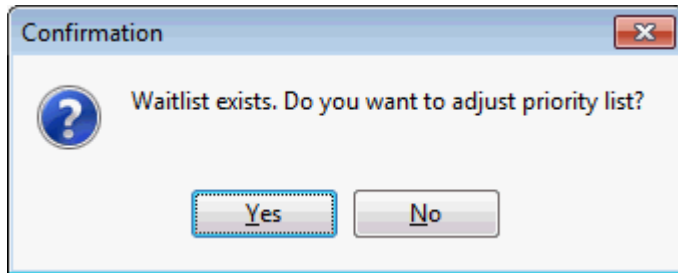


6. Select YES, the Event Status change screen is displayed.



7. Select the EVENT NEW STATUS from the list box.

8. Click OK, if there are other events on the waiting list the following message may be displayed "Event(s) with higher priority exists! Continue?".
9. Select YES, to continue, the following message is displayed:

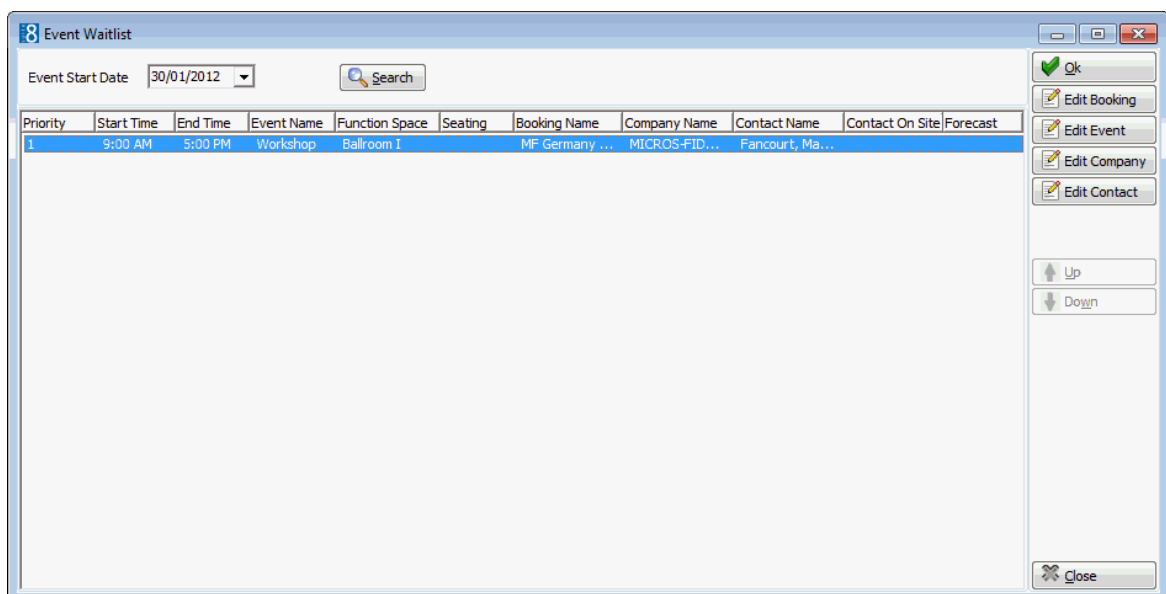


10. Select No if the priority should not be adjusted, then the waitlist priority will be set in order of the entered events.
11. Select YES to adjust the priority list, the Event Waitlist screen is displayed showing all events currently on the waitlist.
12. Use the up and down arrows to adjust the event priority, click OK to close the Event Waitlist screen.
13. The Conference Diary is displayed showing the booked event.

Viewing waitlisted events

Waitlist events may be viewed from the Conference Diary or via the quick key Waitlist Priority (Ctrl + W). Viewing the waitlist via the quick key allows the user to view all events which are currently waitlisted for a particular day.

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen.
2. Place the cursor on an occupied grid square and right-click to display the short-cut menu.
3. Click SHOW WAITLIST on the shortcut menu to display the Event Waitlist screen.



4. The priority order of the waitlisted events may be changed by pressing the up and down arrows.
5. The Booking, Event, Company and Contact may be edited.

Note: The Event Waitlist screen may be displayed by selecting WAITLIST PRIORITY (CTRL+W) from the QUICK KEYS menu.

The following options are available from the event waitlist screen:

- Edit Booking
- Edit Event (See page 86)
- Edit Company Profile

This option is only available if a company profile has been linked. Via this option any details related to the company profile can be viewed or changed, such as:

- Change/add/delete address
- Change/add/delete communication
- Enter/view/delete notes
- View/change the marketing information
- View/delete linked profiles
- Create new links between profiles
- Edit Contact

Note: When deleting a function space from a waitlisted event a message will be displayed to change the event status to the booking status as the event is not waitlisted anymore.

Conference Packages

Conference packages can be set up to include a conference room, coffee breaks, meals and technical equipment and are usually offered at a fixed price. This option allows the user to quickly and easily, select and book a conference package which means that all the necessary events required are booked in one step and do not have to be entered one by one.

If a conference package has been booked then the PACKAGE search field displayed on the Event Details screen can be used to display a list of the events belonging to the package. The display order of the conference packages can be defined by moving the packages up or down on the grid as required. The display order can only be defined within the same day.

If Alternative functionality is active then alternative packages can be defined; this enables the customer to reserve alternatives and make a final decision at a later date, for example, Package I may be booked and Package II reserved as an alternative.

The first package added to an event cannot be set as an alternative as there are no other packages for it to be an alternative to. When at least one package exists then the ALTERNATIVE option and the alternative selection box are displayed. The Alternative option can be selected without selecting a specific alternative or a specific alternative can be selected from the list of already booked packages.

Packages can be merged. Already booked packages can be merged and merged packages can be unmerged. If unmerged is selected all originally booked events and resources will be displayed. In addition a new column is displayed to show if package is merged. All events which are the same are merged and those which are different are kept.

Package events will only be merged under the following conditions:

- Events are the same event type and have overlapping day and time.
- Resources have the same function space, miscellaneous items, standard menu and menu items.
- Miscellaneous items, same items are merged and different items are added; for example, Package I has a flip chart and a beamer, Package II has a flip chart and an overhead projector, after merging there will be 1 flip chart, 1 beamer and 1 overhead projector.

- Same function spaces are not merged.
- Catering items are summarized if defined per person otherwise they are added.
- Miscellaneous items we merge only when booked resource and added resource have the per person flag activated.
- To merge resources we use the ID.

How to add a new package

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click PACKAGES, the Packages for booking screen is displayed. Any conference packages already attached to the event are listed.

Start Date	End Date	Package Name	Package Price	Pax	Alternative	Merged	Merged to ID	ID
11/07/11	11/07/11	Conference Package III	81.00	50				1215

5. Click NEW to add a new conference package, the Add new package dialog box is displayed.

8 New Package for booking Apex Conference - 11/07/11 (Booking ID: 1272)

Start Date: 11/07/2011

End Date: 11/07/2011

Package: [dropdown]

Name: [text box]

Price: 0

Pax: 50.00

Alternative [dropdown]

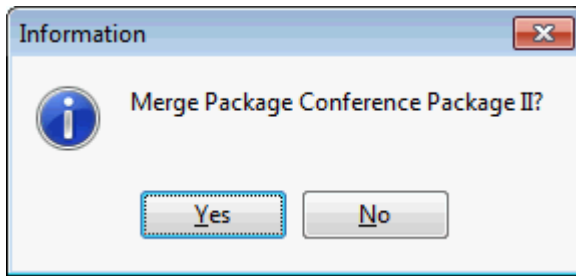
Start Date	End Date	Start Time	End Time	Event Name	Pax	Expense
[Empty grid area]						

Buttons: New, Edit, Delete, Close, OK

6. The START DATE is completed automatically with the start date of the booking master.
7. The END DATE is completed automatically with the end date of the booking master.
8. In the PACKAGE box, click on the down arrow to open the drop-down list, and select a conference package.
9. When the package is selected the NAME and PRICE options are automatically completed, they can be changed as required.
10. The PAX option is also automatically completed with the number of attendees as defined on the event; this can be changed as required.
11. Select the ALTERNATIVE option to book an alternative conference package; select a specific alternative package from the list of booked packages.

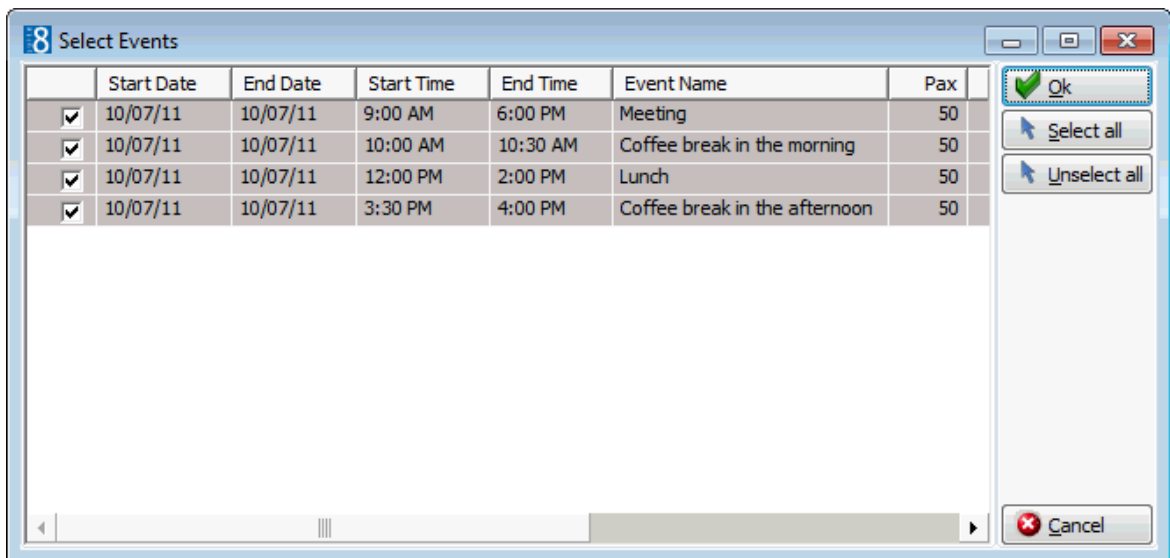
NOTE: This option is only displayed when at least one other package has been defined.

12. The grid in the lower half of the package dialog box is completed with the conference package breakdown, the event name and the start and end times for each event included in the package are detailed.
13. Click OK to close the Add new package dialog box.
14. If there are already booked packages and merge package functionality is active then a message is displayed asking if to merge the package. If there are multiple packages already booked then a selection screen is displayed.



15. Click YES to merge the package.

Depending on the merge package configuration the packages are merged automatically or a list of the conference package events is displayed; all events are selected by default to be merged.



16. Make any adjustments required to the selection and click OK to merge the events.

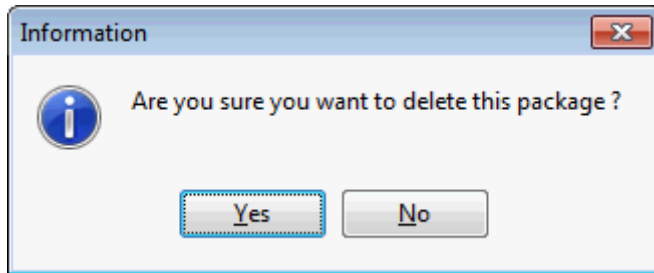
17. Click CLOSE, all events defined in the conference package are listed on the Event Details screen.

Conference Package dialog box

Field Name	Description
Start Date	Will be completed with the arrival date from the booking master
End Date	Will be completed with the To date from the booking master. Currently no packages can be defined for more than one day
Package	Select from list box the defined conference packages
Name	Will be completed automatically using the package name of the pre-defined package. The name can be changed
Price	The configured package price will be filled
Pax	The number of attendees will be filled with the defined attendees on the event level
All package items of the conference package are displayed.	

How to delete a package

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click PACKAGES, the Packages for Booking screen is displayed.
Any conference packages already attached to the event are listed.
5. Select the conference packages to be deleted and click DELETE, a confirmation message is displayed.



6. Click YES to delete all events and resources included in this package.
7. Click CLOSE, all events included in the conference package are deleted from the event edit screen.

How to update the package price

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click PACKAGES, the Packages for Booking screen is displayed.
Any conference packages already attached to the event are listed.
5. Select the conference package to be edited and click EDIT, the Update Package dialog box is displayed.

8 Edit Package Conference Package III for booking Apex Conference - 11/07/11 (Booking ID: 1272)

Start Date: 11/07/2011

End Date: 11/07/2011

Package: CP3 Conference Package III

Name: Conference Package III

Price: 81.00

Pax: 50.00

Alternative

	Start Date	End Date	Start Time	End Time	Event Name
<input type="checkbox"/>	11/07/11	11/07/11	9:00 AM	6:00 PM	Meeting
					Banquet Room Rental
					Banquet Beverage
					Technical Equipment
<input type="checkbox"/>	11/07/11	11/07/11	10:00 AM	10:30 AM	Coffee break in the morning
					Banquet Beverage
					Banquet Food
<input type="checkbox"/>	11/07/11	11/07/11	12:00 PM	2:00 PM	Lunch
					Banquet Food
					Banquet Beverage
<input type="checkbox"/>	11/07/11	11/07/11	3:30 PM	4:00 PM	Coffee break in the afternoon
					Banquet Food
<input type="checkbox"/>	11/07/11	11/07/11	7:00 PM	9:00 PM	Dinner
					Banquet Food

6. Select the package detail to be edited, click EDIT, the Update package event dialog box is displayed.

8 Update package event

Department Code: 322 Banquet Beverage

Expected Per Person: 6.00

Orig. Forecast P. Pers.: 6.00 Total: 300.00

Rebate: % Flat Total Rebate:

Forecast Per Person: 6.00

7. Update the price in the EXPECTED PER PERSON AND FORECAST PER PERSON boxes.
8. Click OK to close the Update package event dialog box.
9. Click OK then click CLOSE to return to the Event Details screen.

Note: The package price is calculated based on the package split, taking into consideration the revenue entered for each event by department code.

How to copy a package

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.

4. Select an event and click PACKAGES, the Packages for Booking screen is displayed. Any conference packages already attached to the event are listed.
5. Select the conference package to be copied and click COPY, the Package Copy dialog box is displayed.
6. The BOOKING DATES of the event are displayed for information purposes at the top of the package copy dialog box.
7. Enter the No. OF COPIES to be made, package copies are made by day; an additional line is added to the package copy screen for each copy required.

8 Copy Package Conference Package II - 11/07/11 of booking Apex Conference (Bo...

Booking Dates : 11/07/11 - 11/07/11

No. of Copies : 1.00

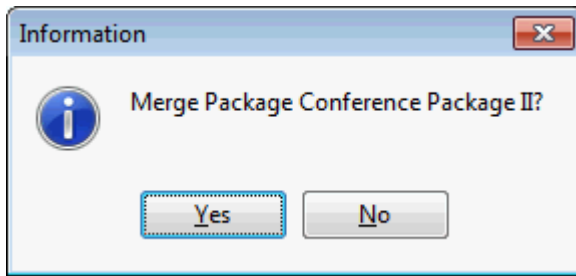
	Date	Package name	Attendees
1	<input checked="" type="checkbox"/> 11/07/2011	Conference Package II	15.00
	<input type="checkbox"/> Alternative		

OK Cancel

8. Type the required date in the DATE box **or** click the drop down arrow and select a date from the calendar.
9. The PACKAGE NAME and ATTENDEES are completed by default.
10. Select the ALTERNATIVE option to reserve an alternative conference package; select a specific alternative package from the list of booked packages.
11. Click OK to save the package copy.

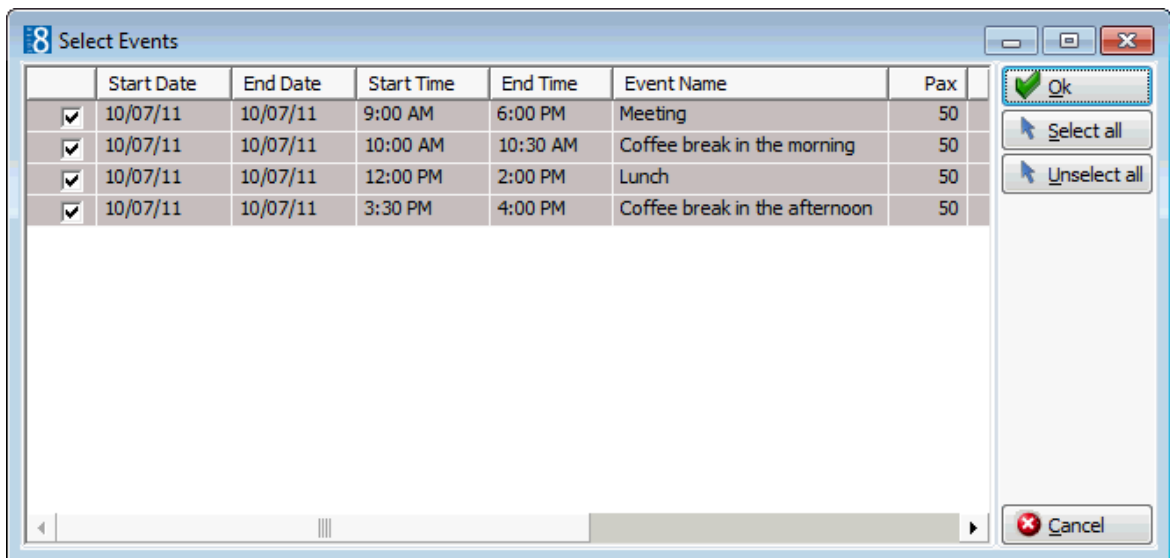
How to merge a package

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click PACKAGES, the Packages for Booking screen is displayed. Any conference packages already attached to the event are listed.
5. Select the conference package to be merged and click MERGE, a confirmation message is displayed.



6. Click YES to merge the package.

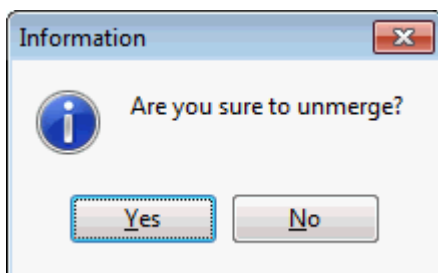
Depending on the merge package configuration the packages are merged automatically or a list of the conference package events is displayed; all events are selected by default to be merged.



7. Make any adjustments required to the selection and click OK to merge the events.

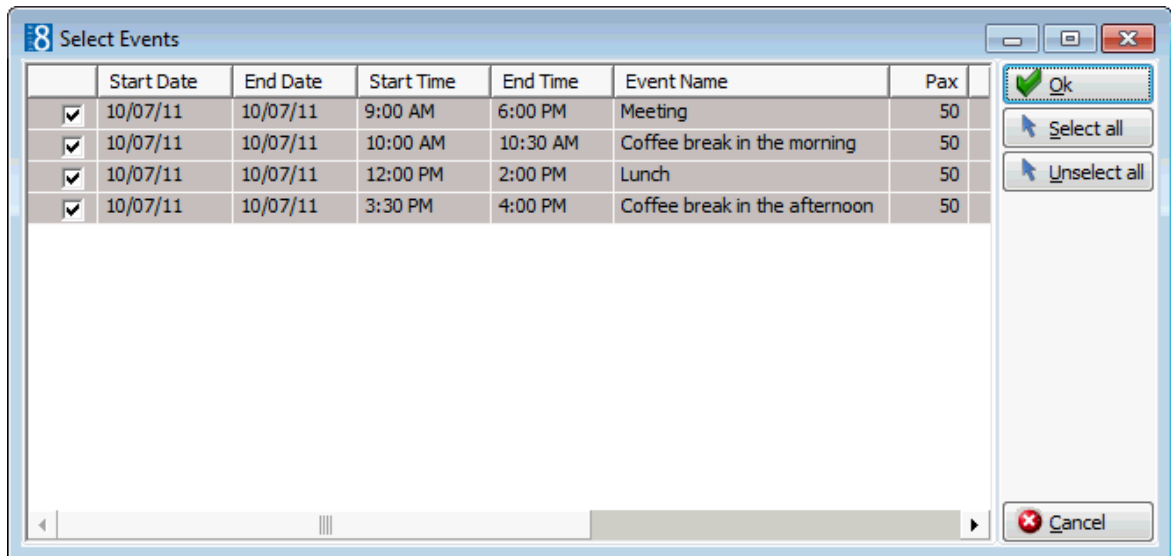
How to unmerge a package

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click PACKAGES, the Packages for Booking screen is displayed. Any conference packages already attached to the event are listed.
5. Select the conference package to be unmerged and click UNMERGE, a confirmation message is displayed.





6. Click YES to unmerge the package.

A list of the conference package events is displayed; all events are selected by default to be unmerged.



7. Select the events to be unmerged and click OK.

 Merge package event functionality is controlled by the parameter MERGE PACKAGES under Setup → Configuration → Global Settings → CCM → Conference 1 tab. Packages can be merged automatically or the user can choose which package events to merge. With both the MERGE AUTOMATIC and ASK FOR MERGING options the user is prompted before merging the package events, however, with the option ASK FOR MERGING the user can select which events to merge.

 Alternatives functionality is controlled by the parameter USE ALTERNATIVES under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

Note: If a package is required for 2 days, the package should not be booked as start date: Day 1 and end date: Day 2 as this would block the function spaces for the individual events for the entire time and not just from 09.00-18.00 on both days.

Note: Packages set as ALTERNATIVE cannot be merged and packages already merged cannot be set as ALTERNATIVE.

Event Groups

Event groups can be set up to include all the necessary events and resources for a particular type of event, for example, a wedding. This option allows the user too quickly and easily, select and book an event group which means that all the necessary events required are booked in one step and do not have to be entered one by one.

If an event group has been booked then the EV. GROUP search field displayed on the Event Details screen can be used to display a list of the events belonging to the event group.

If more than one event group has been booked then selecting the option GROUP BY PACKAGE/EVENT GROUP will group the resources per event group. The display order of the event groups can be defined by moving the event groups up or down on the grid as required. The display order can only be defined within the same day.

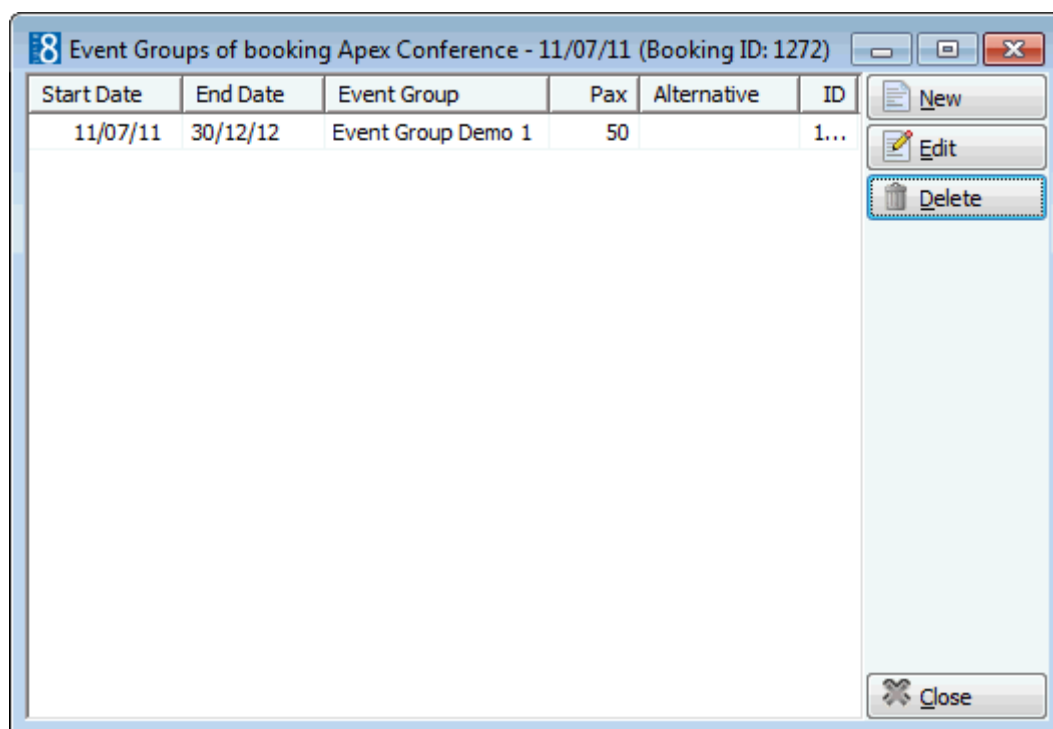
If Alternative functionality is active then alternative event groups can be defined; this enables the customer to reserve alternatives and make a final decision at a later date, for example, Wedding Party Style I may be booked and Wedding Party Style II reserved as an alternative.

The first event group reserved cannot be set as an alternative as there are no other event groups for it to be an alternative to. When at least one event group exists then the ALTERNATIVE option and the alternative selection box are displayed. The alternative option can be selected without selecting a specific alternative or a specific alternative can be selected from the list of already reserved event groups.

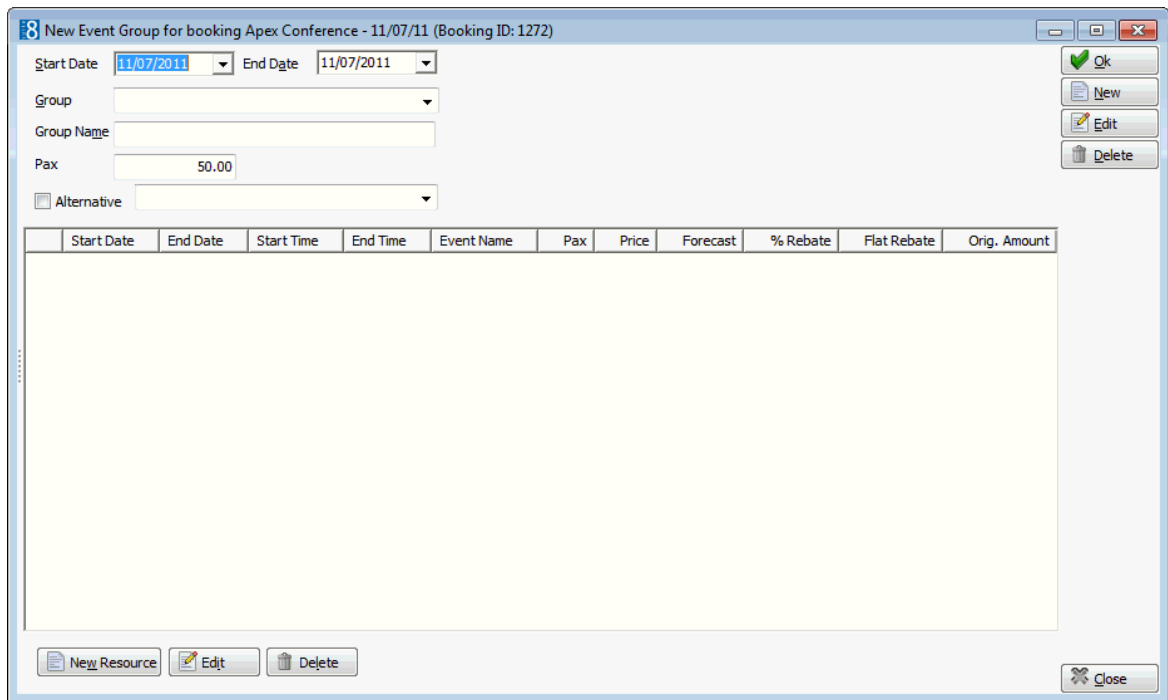
How to add a new event group

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select an event and click Ev. GROUPS, the Event Groups screen is displayed.

Any event groups already attached are listed.



5. Click NEW to add a new event group; the Event Groups dialog box is displayed.



6. The START DATE is completed automatically with the start date of the booking master.
7. The END DATE is completed automatically with the end date of the booking master.
8. In the GROUP box, click on the down arrow to open the drop-down list, and select an event group.
When the group is selected the GROUP NAME is automatically completed but can be changed as required.
9. The PAX option is also automatically completed with the number of attendees as defined on the event.
10. Select the ALTERNATIVE option to reserve an alternative event group; select a specific alternative event group from the list of reserved event groups.


NOTE: This option is only displayed when at least one other event group has been reserved.


11. The grid in the lower half of the event groups dialog box is completed with the event breakdown, the event name and the start and end times for each event included in the event group are detailed.
12. Click OK to close the Event Groups dialog box.
13. Click CLOSE, all events defined in the event group are listed on the Event Details screen; a blue tick mark ✓ indicates that the event is part of an event group.

Event Groups dialog box

Field Name	Description
Start Date	Completed with the arrival date from the booking master
End Date	Completed with the start date from the booking master.
Group	Select from list box the defined event groups.
Group Name	Completed automatically using the event name of the pre-defined group. The name can be changed

Pax	The number of attendees will be filled with the defined attendees on the event level
Alternative	Select this option to reserve an alternative event group; select a specific alternative event group from the list of reserved event groups. NOTE: This option is only displayed when at least one other event group has been reserved.
All items of the event group are displayed.	

 Event groups functionality is controlled by the parameter USE EVENT GROUPS under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

 Alternatives functionality is controlled by the parameter USE ALTERNATIVES under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

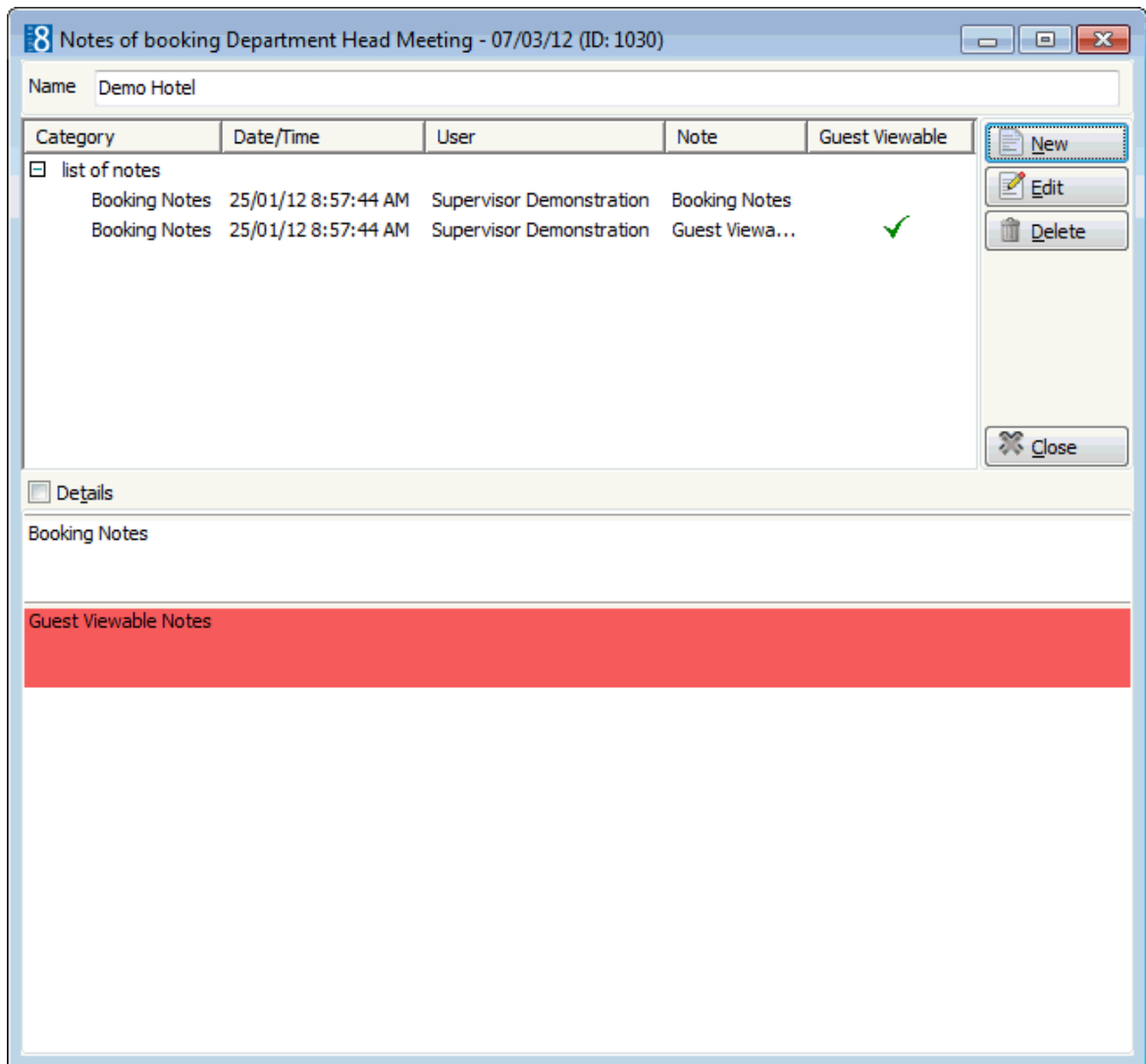
Notes

An unlimited number of notes can be added to each booking master, event or resource.

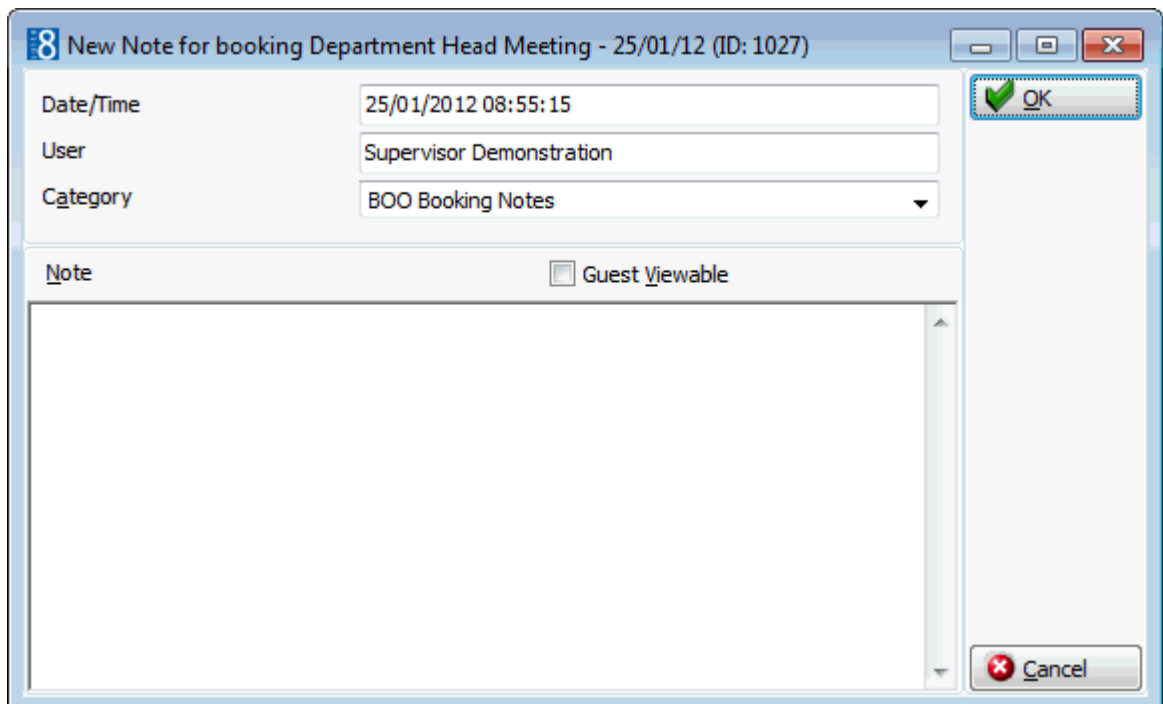
- To add, view or delete booking master notes, select the booking master, click the **OPTIONS** button and select **NOTES** from the options menu.
- To add, view or delete booking master notes from the conference diary, select the event on the conference diary, right-click to display the short cut menu, select **BOOKING OPTIONS** and then select **NOTES**.
- To add, view or delete event or resource notes from the conference diary, select the event on the conference diary, right-click to display the short cut menu and select **VIEW ALL EVENTS** to display the Event Details screen. Select the event or resource to which a note is to be added. Click the **NOTES** button on the right-hand side of the screen to add a note to an event. Click the **NOTES** button on the bottom of the screen to add a note to a resource.
- To add, view or delete event or resource notes on the Event Details screen, select the event or resource to which a note is to be added. Click the **NOTES** button on the right-hand side of the screen to add a note to an event. Click the **NOTES** button on the bottom of the screen to add a note to a resource.

How to add a new booking master note

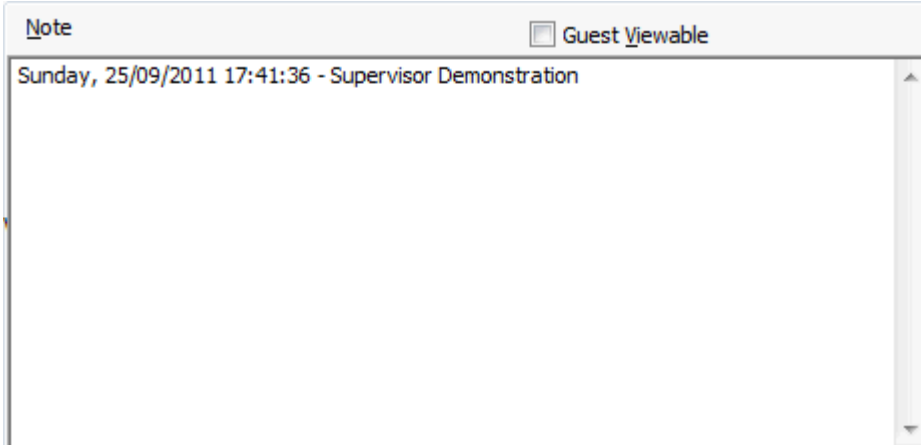
1. Click the **NOTES** button to display the notes dialog.
2. Any existing notes are listed in the upper part of the dialog box.



3. Click the NEW button to display the Add Note dialog.



-
4. The DATE/TIME and USER are automatically completed.
 5. Select a NOTE CATEGORY from the drop-down list.
 6. Select the option GUEST VIEWABLE if the guest is allowed to view the note. Depending on the definition and setup of any customer correspondence, this option is used to control which notes should appear on contracts, offers or letters. Leave it empty if you do not want the guest to be aware of this note.
 7. In the NOTE box enter the text for the note.
 8. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.



The image shows a screenshot of a software dialog box titled "Note". In the top right corner of the dialog, there is a checkbox labeled "Guest Viewable" which is currently checked. The main body of the dialog is a text area containing the text "Sunday, 25/09/2011 17:41:36 - Supervisor Demonstration". The text area has a vertical scrollbar on the right side.

9. Click OK to save the note.

How to edit a booking master note

1. Click the NOTES button to display the notes dialog.
2. All the existing notes are listed in the upper part of the dialog box. The text of each note is listed in the lower part of the dialog box. Click on the DETAILS button to view details such as the category, when the note was entered and the time it was entered.
3. Select the note to be edited and click the EDIT button to display the Edit Note dialog box.
4. Make any changes required and click OK to save the note.

How to delete a booking master note

1. Click the NOTES button to display the notes dialog.
2. All the existing notes are listed in the upper part of the dialog box. The text of each note is listed in the lower part of the dialog box. Click on the DETAILS button to view details such as the category, when the note was entered and the time it was entered.
3. Select the note to be deleted.
4. Click the DELETE button, a confirmation message is displayed.
5. Click YES, the note is deleted.

How to add a new note to an event or resource

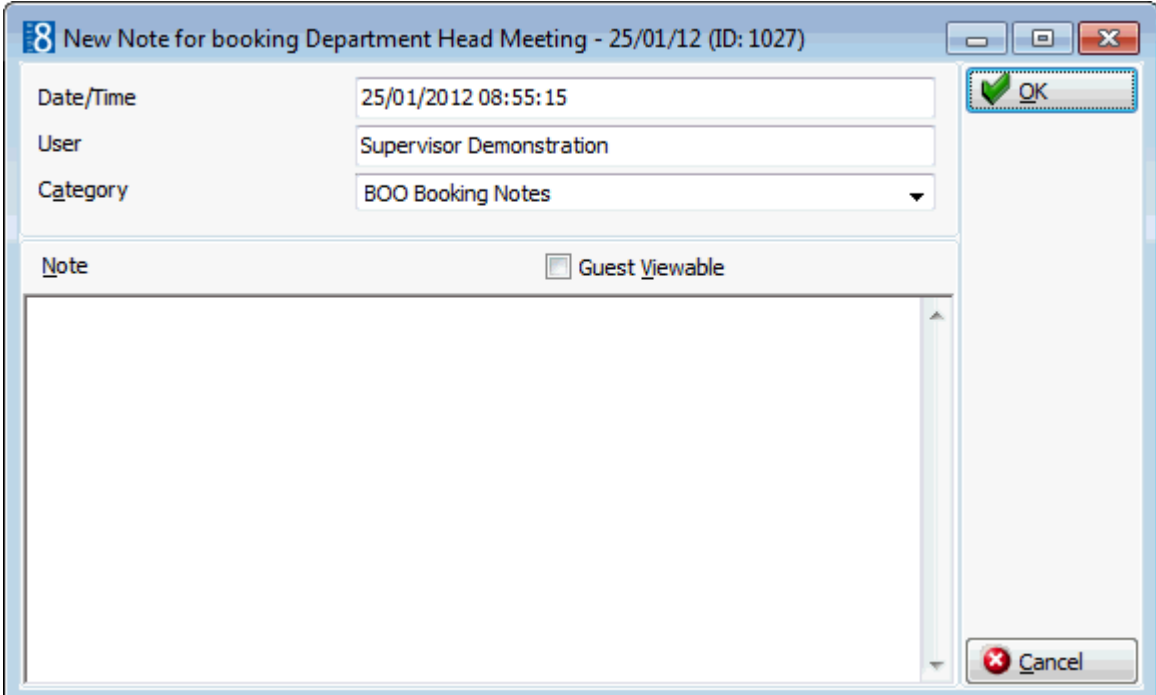
1. On the Event Details screen, select the event or resource to which a note is to be added.

Click the NOTES button on the right-hand side of the screen to add a note to an event.

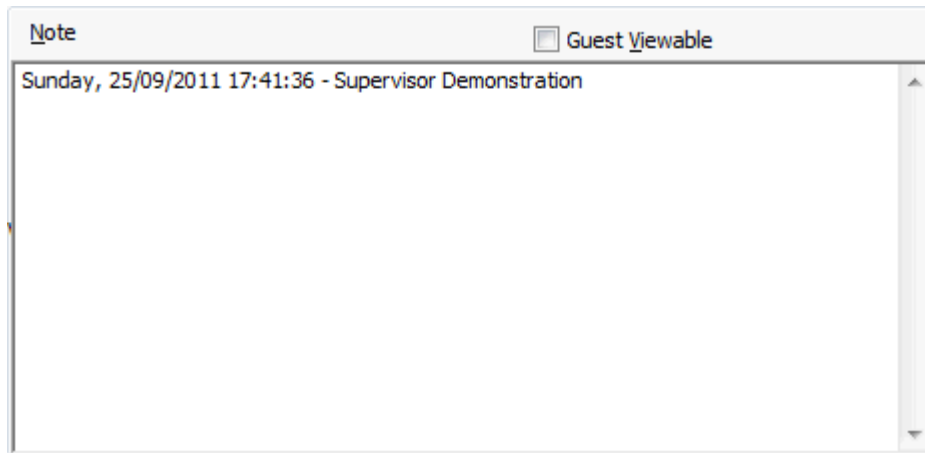
Click the NOTES button on the bottom of the screen to add a note to a resource.

The notes dialog box is displayed; any existing notes are listed in the upper part of the dialog box.

2. Click the NEW button to display the Add Note dialog.



3. The DATE/TIME and USER are automatically completed.
4. Select a NOTE CATEGORY from the drop-down list.
5. Select the option GUEST VIEWABLE if the guest is allowed to view the note. Depending on the definition and setup of any customer correspondence, this option is used to control which notes should appear on contracts, offers or letters. Leave it empty if you do not want the guest to be aware of this note.
6. In the NOTE box enter the text for the note.
7. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.



8. Click OK to save the note.


How to edit an event or resource note


1. On the Event Details screen, select the event or resource for which a note is to be edited.
Click the NOTES button on the right-hand side of the screen to edit an event note.
Click the NOTES button on the bottom of the screen to edit a resource note.
2. All the existing notes are listed in the upper part of the dialog box. The text of each note is listed in the lower part of the dialog box. Click on the DETAILS button to view details such as the category, when the note was entered and the time it was entered.
3. Select the note to be edited and click the EDIT button to display the Edit Note dialog box.
4. Make any changes required and click OK to save the note.

How to delete an event or resource note

1. On the Event Details screen, select the event or resource for which a note is to be deleted.
Click the NOTES button on the right-hand side of the screen to delete an event note.
Click the NOTES button on the bottom of the screen to delete a resource note.
2. All the existing notes are listed in the upper part of the dialog box. The text of each note is listed in the lower part of the dialog box. Click on the DETAILS button to view details such as the category, when the note was entered and the time it was entered.
3. Select the note to be deleted.

4. Click the DELETE button, a confirmation message is displayed.
5. Click YES, the note is deleted.

 Note Categories are defined via the option NOTES CATEGORIES under Setup → Configuration → Conference Management. Note Categories can be defined to be restricted and then only users with the appropriate user rights can view, edit, insert or delete a restricted note. Note categories can also be defined to pop-up when editing the booking master, event or resource.

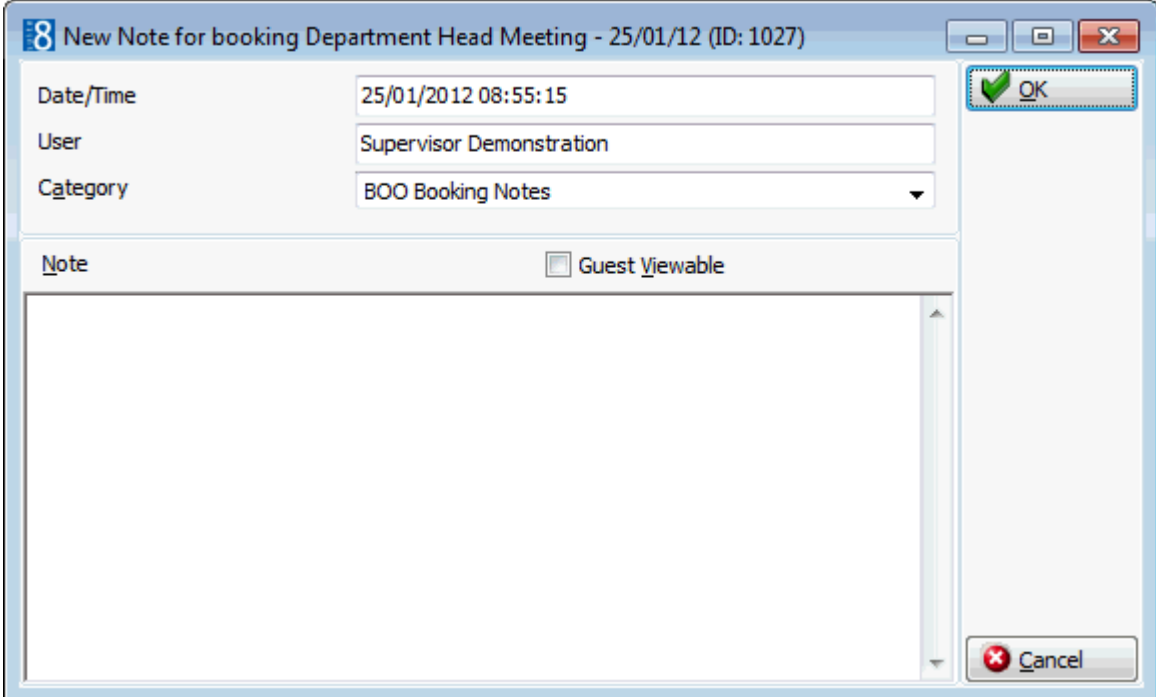
 Restricted notes functionality is controlled by the rights under the user right RESTRICTED NOTES under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

Text Templates

Text templates may be created and used where the same text is required very often or where the same basic text can be used and minor adjustments made.

How to create a template

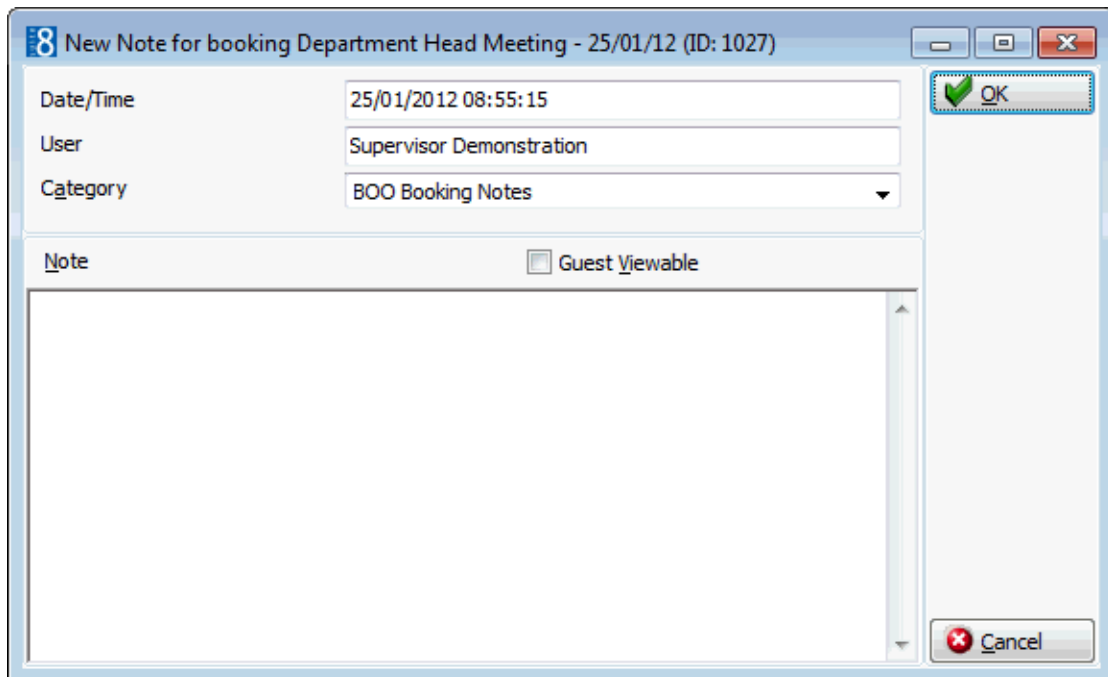
1. Open any NOTES screen.
2. Click NEW to open the Add Note dialog box.



3. Enter the text required for the template.
4. Press ALT + E to export the text, the Text Template dialog is displayed.
5. Allocate a FILE NAME for the template.
6. Click OK to save the template.
7. The Add Note dialog is re-displayed; click OK to save the text as a note or CANCEL to exit from the Add Note dialog screen.
8. Click CLOSE to close the Notes dialog.

How to import a template

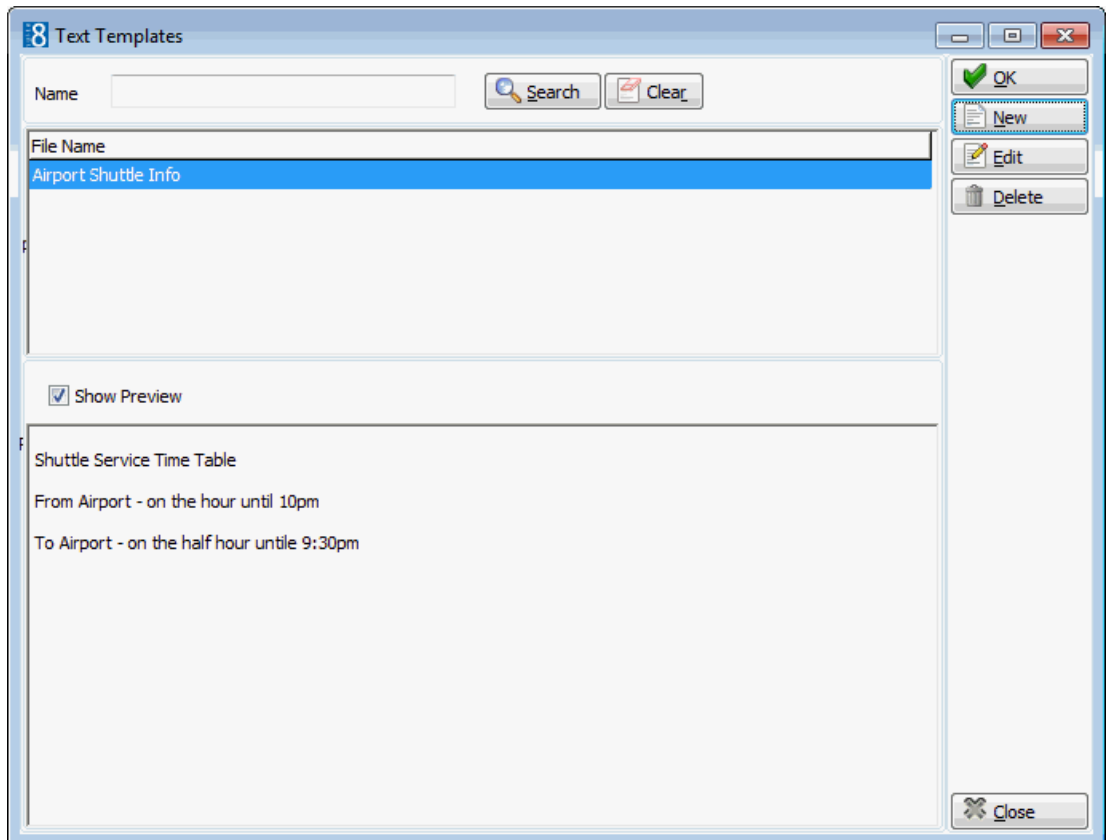
1. Open the NOTES screen.
2. Click NEW to open the Add Note dialog screen.



The screenshot shows a dialog box titled "New Note for booking Department Head Meeting - 25/01/12 (ID: 1027)". It contains the following fields and controls:

- Date/Time:** 25/01/2012 08:55:15
- User:** Supervisor Demonstration
- Category:** BOO Booking Notes (dropdown menu)
- Note:** A large text area for entering the note content.
- Guest Viewable:** A checkbox that is currently unchecked.
- Buttons:** OK (top right), Cancel (bottom right).

3. Place the cursor in the note box and press ALT + I to import a text template.
4. The Text Template dialog is displayed listing all available templates.



The screenshot shows a dialog box titled "Text Templates". It contains the following fields and controls:

- Name:** A text input field.
- Search:** A button with a magnifying glass icon.
- Clear:** A button with a trash can icon.
- File Name:** A list box showing "Airport Shuttle Info" selected.
- Show Preview:** A checked checkbox.
- Preview:** A text area displaying the content of the selected template: "Shuttle Service Time Table", "From Airport - on the hour until 10pm", and "To Airport - on the half hour until 9:30pm".
- Buttons:** OK (top right), New (top right), Edit (top right), Delete (top right), Close (bottom right).

- To search for a template, enter a template NAME, click SEARCH.
 - To edit an existing template, click the EDIT button.
 - To create a new template, click the NEW Button.
5. Double-click the required template or highlight the required template from the list and click OK.
 6. The Add Note dialog is displayed with the template in the NOTE box.
 7. Make any adjustments necessary and click OK to save the note.
 8. Click CLOSE to close the Notes dialog.

Note: Text template can also be imported in to the body part of the print screen when sending emails.



Text templates can also be created via the option TEXT TEMPLATES under Setup → Configuration → Miscellaneous.

Sub Events

The sub event option allows users to create events as sub-events into the same function space as the master event without double booking.

Special features of the master and sub event relationship

- A sub event must be in the same function space as the master event, but can have a different seating arrangement or rate.
- The start and end time of a sub-event, also taking into consideration any setup and set down time must overlap with the start and end time of the master event. For example: A conference from 09:00-18:00 will be created as the master event and morning coffee from 08:30-09:00 could be created as a sub event.
- The Block box in the event edit screen will always be updated with the earliest time of either the sub or master event and with the latest time of either the sub or master event. This option always indicates the start and end times the function space is blocked.
- In the event grid **M** indicates the master event and **S** will indicates the sub events. In addition master/sub-events are displayed in a tree format and can be expanded and collapsed.
- Easy conversion from a master event to a sub-event by vice versa.
- Changing the number of attendees in the master event will prompt the user to change the number of attendees in the sub events. The user will be given the option to change all sub events or only the ones with the same number of attendees.

How to create a sub event

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
2. Click SUB EVENT or right-click and select ADD SUB EVENT from the short-cut menu. The New Event screen is displayed with a comment indicating that this is a Sub Event of 'Event Name'.

8 New Sub Event for event Meeting - 30/01/12 9:00 AM (Booking ID: 1242)

Event

Company Name: MICROS-FIDELIO GmbH
 Contact Name: Fancourt, Martin
 Contact on site:
 Booking Name: MF Germany Suite 8 Conference

Event Information **Sub Event of Meeting (1482)**

Event Status: TEN/Tentative
 Event Type:
 Event Name:
 No. of Attendees: 50 Min. Guarantee:
 Start Date: 30/01/2012 End Date: 30/01/2012
 Start Time: End Time:
 Alternative

Info Board:
 Info Board Profile:
 Incl. in Package
 Noisy

Function Space Information



Function Space: Ballroom I
 Seating Arr.:
 Rate: Amount: Setup Time:
 Dept. Code: 330 Banquet Room Re Special Rate: Don't Move: Incl. in Package:
 Rebate: % Flat: Orig. Amount: Cost Price:
 Alternative

Expected / Forecast Information

Department Code	Curr	Expected Per Pers.	Expected Flat Rate	Expected Total	Forecast	Net	Tax

OK
Table Res
Cancel

- Complete the options as detailed in the table below:
- Click OK to save the sub event.

A master event is indicated by  in the first column. Clicking the plus sign lists all the sub events which are then indicated by  in the first column. The BLOCK option on the Master Event will be updated where applicable.

Event dialog box

Field Name	Explanation
Event Information	
Event Status (Required)	The event status field will be filled automatically with the status entered under conference status on the booking master. It can be changed if required by selecting the status for this particular event from the drop down list.

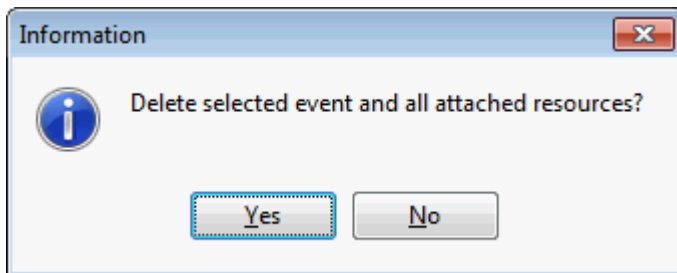
Event Type (Required)	Select the event type from the drop down list. When selecting the event type the event name will be filled in automatically with the definition entered under Setup → Configuration → Conference Management → Event Type. It can be changed if required. If the event types have been defined with default forecast figures under Setup → Configuration → Conference Management → Event Defaults, the forecast/revenue information at the bottom of the event edit screen will be filled as well.
Event Name (Required)	The name of the event will be filled automatically after the event type has been selected. It can be changed at any time.
No of Attendees (Required)	The number of attendees for the event. The number of attendees entered will be taken for several checks, for example function space and seating arrangement check.
Min Guarantee	Enter the minimum number of guaranteed persons. This number is normally taken for billing even if less should turn up for the function.
Start Date	The start date is filled automatically with the system date if it is within the range of the arrival and departure date. Future bookings will default to the arrival date of the booking master. It is not possible to create an event that is not within the arrival and departure date of the booking.
End Date	The end date is filled automatically with the end date of the booking master. It is not possible to create an event that is not within the arrival and departure date of the booking.
Start Time	If the event type has been configured with default start time, then it is filled in automatically, but can be changed by entering a time or selecting one from list box. If the event was booked through the conference diary then the start time is taken from the diary.
End Time	If the event type has been configured with default end time, then it is filled in automatically, but can be changed by entering a time or selecting one from list box. If the event was booked through the conference diary then the end time is taken from the diary. Note: If an event finished past midnight, the end date has to be changed to the next day.
Info Board	Enter the information that should be placed on the info board outside the function space such as "Fidelio Software – Dealer Conference".
Info Board Profile	Mainly used in conjunction with the doorcard interface, this option allows the property to enter a different name. For example, the booking was made by Star Conferences for the company IBM; so on the doorcard IBM should be displayed.

	The handling is such that when a company and a contact are entered the entry in the field Info Board Profile replaces the company, if only a contact is entered the entry in the Info Board Profile replaces the contact. If no entry is made in the Info Board Profile then the company/contact name from the booking will be displayed.
Incl. in Package	Check this box to define if the event is included in a conference package. The field is only accessible if a conference package has been booked for this day.
Noisy	Select this box to indicate that the event will be a 'noisy' one such as a dinner party with live music playing. If the noisy flag has been set, users can also see the indication in the conference diary.
Block	This is a view only field and shows the start time and the end time the function space is blocked for. This is setup time plus event start time and event end time plus set down time. This is completed automatically if a room block with a block code is attached.
Function Space Information	
Function Space (Required)	Select the function space from the drop-down list of defined function spaces. If a shareable function space is linked to the event type selected, this will be displayed automatically, but may be changed as required.
Seating Arrangement	Select the seating arrangement from the drop-down list. In some cases the seating arrangement might already be filled in, i.e. if the parameter flag: MULTIPLE FUNCTION SPACES PER EVENT has been activated under Setup → Configuration → Global Settings → Conference tab.
Rate	Select the rate from list box of defined rates, such as full day or half day. The rate codes are defined under Setup → Configuration → Conference Management → Function Spaces → Rate Codes. In some cases the rate might already be filled in, i.e. if the parameter MULTIPLE FUNCTION SPACES PER EVENT has been activated under Setup → Configuration → Global Settings → Conference tab.
Amount	The amount is filled with the rate entered under Setup → Configuration → Conference Management → Function Space Definition → Rates tab. It is also possible to change this amount with a special rate. The special rate field will be checked if this is the case.
Dept Code (Required)	The department code. In order to use the posting functionality, every resource item has to have a department code assigned. This can be done via the configuration part. The field is filled automatically with the department code entered on the function space definition.
Special rate	If a different rate has been entered in the amount field, this field will indicate the change with a tick mark.

Setup Time	If the seating arrangements have been defined with default setup time, the default values will be filled in automatically, but can be changed at any time.
Set down Time	If the seating arrangements have been defined with default set down time, the default values will be filled in automatically, but can be changed at any time. Please note that the function space will be booked from the event start until the event end time including the defined setup and set down time.
Don't Move	This field should be marked if a customer insists on a particular function space. If this field is selected users will also see the indicator in the conference diary.
Incl. in Package	The field is only accessible if a conference package has been booked for this day.

How to delete a sub event

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select an event from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select the sub event, indicated by **S** in the first column and click DELETE, a confirmation message is displayed.



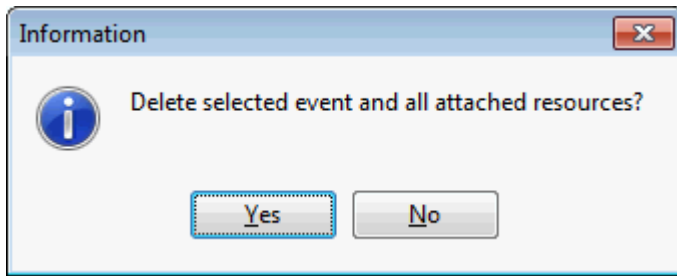
5. Select YES to delete the event.
6. The sub event is deleted along with all resources attached to the event.
The BLOCK option on the Master Event will be updated where applicable.

Note: Multiple sub events can be selected for deletion using the shift and down arrow keys.

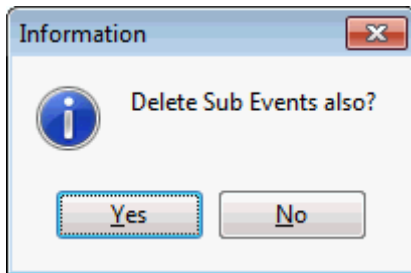
Deleting an event/sub event is user right dependent. Deletion of an event/sub event is not allowed if the CCM Info Board Interface is active.

How to delete a master and a sub event

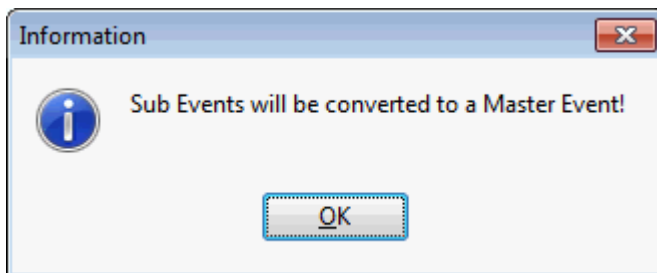
1. Click the MEETING PLANNER menu and select Booking CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select the master event, indicated by **M** or **S** and click DELETE, a confirmation message is displayed.



5. Select YES to delete the event, a message is displayed asking if the sub events should also be deleted.



6. Select YES to delete the sub events.
7. The master event and sub event are deleted along with all resources attached.
8. Select No to delete only the master event and convert the sub event to a master event.



9. Click OK on the confirmation message.

The master event is deleted and the sub event is converted to be the master event.

Note: Deleting an event/sub event is user right dependent. Deletion of an event/sub event is not allowed if the CCM Info Board Interface is active.

How to convert a sub event to a master event

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select the sub event and right-click to display the short-cut menu.
5. Click CONVERT TO MASTER EVENT, a message is displayed informing you that the previously selected function space is not available.
6. Select either the NEW FUNCTION SPACE or the WAITLIST button.
7. Complete the New Function Space dialog box.

-
8. Click OK, you are asked if you want to add default miscellaneous items.
 9. Select YES to add the default miscellaneous items.

The event is converted and displayed in the grid as a master event.

How to convert a master event to a sub event

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the EVENTS button, the Event Details screen is displayed.
4. Select the master event and right-click to display the short-cut menu.
5. Click CONVERT TO SUB EVENT, the Event list of possible master events is displayed.
6. Select the required master event and click OK.

The event is converted and displayed in the grid as a sub-event. Any default items are automatically removed.

Note: If the master event has existing sub events it can not be converted unless the sub events have been removed or re-linked.

Note: Master/sub event functionality requires that the parameter USE MASTER-SUB EVENTS is active, under Setup → Configuration → Global settings → Conference tab.

Manual Postings

To view posted revenue and to post revenue, select the booking and click EVENTS.

How to post a manual posting

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the OPTIONS button and select EVENT MANUAL POSTINGS.
or
Click the EVENTS button and then click the MANUAL POST button.
The cashier Login dialog box is displayed.
4. Enter a valid Cashier No. and Password and then click LOGIN.
The Manual postings dialog box is displayed.

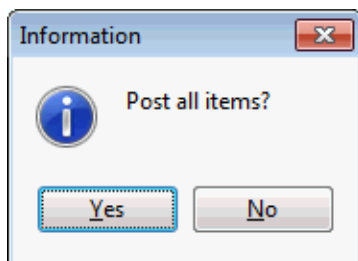
Posting	Period	Dept. Code	Description	Quantity	Unit Price	Amount	Posted
Package Postings							
Conference Package III	08/02/12 - 08/02/12			14	81.00	1134.00	0.00
Meeting	08/02/12 9:00 AM - 08/02/12 6:00 PM	330	Banquet Room Rental	14	10.00	140.00	0.00
Meeting	08/02/12 9:00 AM - 08/02/12 6:00 PM	322	Banquet Beverage	14	6.00	84.00	0.00
Meeting	08/02/12 9:00 AM - 08/02/12 6:00 PM	335	Technical Equipment	14	10.00	140.00	0.00
Coffee break in the morning	08/02/12 10:00 AM - 08/02/12 10:30 AM	322	Banquet Beverage	14	1.50	21.00	0.00
Coffee break in the morning	08/02/12 10:00 AM - 08/02/12 10:30 AM	321	Banquet Food	14	6.00	84.00	0.00
Lunch	08/02/12 12:00 PM - 08/02/12 2:00 PM	321	Banquet Food	14	20.00	280.00	0.00
Lunch	08/02/12 12:00 PM - 08/02/12 2:00 PM	322	Banquet Beverage	14	5.00	70.00	0.00
Coffee break in the afternoon	08/02/12 3:30 PM - 08/02/12 4:00 PM	321	Banquet Food	14	7.50	105.00	0.00
Dinner	08/02/12 7:00 PM - 08/02/12 9:00 PM	321	Banquet Food	14	15.00	210.00	0.00
Non Package Events Postings							
Meeting	08/02/12 9:00 AM - 08/02/12 11:30 AM			14			
Beamer	08/02/12 9:00 AM - 08/02/12 11:30 AM	323	Banquet Misc.	1	50.00	50.00	50.00

- To post the revenue for an individual resource, select the resource and click **POST REVENUE**. In the screen shot below only the revenue for the Beamer was posted.

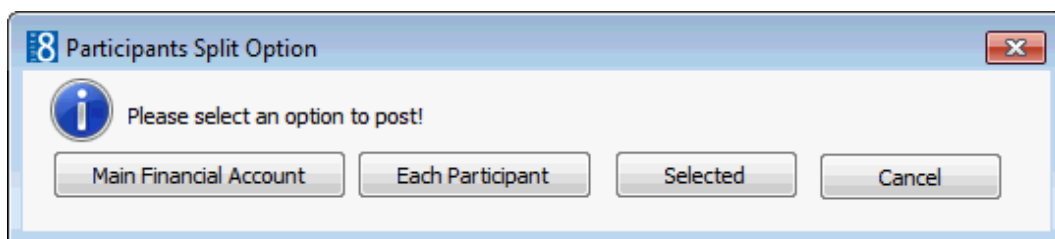
Posting	Period	Dept. Code	Description	Quantity	Unit Price	Amount	Posted
Non Package Events Postings							
Meeting	08/02/12 9:00 AM - 08/02/12 11:30 AM			14			
Beamer	08/02/12 9:00 AM - 08/02/12 11:30 AM	323	Banquet Misc.	1	50.00	50.00	50.00

- To post the revenue for all the resources attached, select the event in the posting grid and click **POST ALL**.

A confirmation message 'Post all values for selected event?' is displayed.



- Select **YES** to post all values for the selected event. Additional options are displayed if the parameter **POST PACKAGES TO PARTICIPANTS** is active and participants have been entered.



- Select **MAIN FINANCIAL ACCOUNT** to post all the charges to the financial account of the booking.
- Select **EACH PARTICIPANT** to post the package to each participant. Any remaining packages will be posted to the main financial account. If the number of packages is less than the number of participants, a message will be displayed to post to the main financial account or to select the participants to whom the package should be posted.
- SELECTED** lists all the participants:

If the number of packages is the same as the number of participants all participants are selected by default.

If the number of packages is less than the number of participants none of the participants is selected by default.



If the number of packages is greater than the number of participants all participants are selected by default and the remaining packages will be posted to the main financial account.

Note: Non-package items will always be posted to the financial account of the booking.

Posting	Period	Dept. Code	Description	Quantity	Unit Price	Amount	Posted
[-] Package Postings							
[-] Conference Package III	03/02/12 - 03/02/12			12	81.00	972.00	972.00
Meeting	03/02/12 9:00 AM - 03/02/12 6:00 PM	330	Banquet Room Rental	12	10.00	120.00	120.00
Meeting	03/02/12 9:00 AM - 03/02/12 6:00 PM	322	Banquet Beverage	12	6.00	72.00	72.00
Meeting	03/02/12 9:00 AM - 03/02/12 6:00 PM	335	Technical Equipment	12	10.00	120.00	120.00
Coffee break in the morning	03/02/12 10:00 AM - 03/02/12 10:30 AM	322	Banquet Beverage	12	1.50	18.00	18.00
Coffee break in the morning	03/02/12 10:00 AM - 03/02/12 10:30 AM	321	Banquet Food	12	6.00	72.00	72.00
Lunch	03/02/12 12:00 PM - 03/02/12 2:00 PM	321	Banquet Food	12	20.00	240.00	240.00
Lunch	03/02/12 12:00 PM - 03/02/12 2:00 PM	322	Banquet Beverage	12	5.00	60.00	60.00
Coffee break in the afternoon	03/02/12 3:30 PM - 03/02/12 4:00 PM	321	Banquet Food	12	7.50	90.00	90.00
Dinner	03/02/12 7:00 PM - 03/02/12 9:00 PM	321	Banquet Food	12	15.00	180.00	180.00

- All resources for the event are posted, click CLOSE to close the manual postings screen.

Posting Dialog Box


Option	Explanation
Posting	This column shows all booked items per event. Use the  and  buttons to open and close the event tree. If a menu price split exists this can be viewed by expanding the event tree.
Period	Shows the date and time of the event and the booked resource.
Dept. Code	Shows the configured department code. Department code can be changed via the EDIT button.
Description	Description of the selected department code.
Quantity	The quantity of the booked item.
Unit Price	The price per booked item.
Amount	Amount of booked resource.
Posted	Shows posted amount.

Note: Event manual posting is not possible when no default department codes for packages or menus have been defined in global settings.

Additional posting functionality/ information

- If the price of a resource that has already been posted changes, it should also be corrected in CCM in order to have the up-to-date information. When the rate is changed, the message 'Catering Item rate changed! Update Posting Information' will be displayed and if answered with YES, the difference will be posted.
- Posted revenue can also be viewed on the revenue/forecast tab.
- Resources and events that have posted revenue can not be deleted.
- It is not possible to change the quantity and/or rate as soon as a resource and/or package have been posted.
- POS systems can post to the corresponding CCM Financial Account.

- When posting standard menus with one menu price split, the department code, description and rate of the split will be displayed in the main line on the manual posting screen.
- When posting standard menus where there are two menu price splits, then Menu Price Split 1 and 2 are listed in the manual posting screen as sub-postings and the total listed in the main line of the menu.

 This posting of package to individual participants is controlled by the parameter POST PACKAGES TO PARTICIPANTS under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

User Log

The user logs may be used to view all the changes made to a booking, an event or a resource.

How to view the User Log from the Conference Diary


1. Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.
The Conference Diary is displayed.
2. On the conference diary screen, highlight an event.
3. Right-click to display the short-cut menu, select BOOKING OPTIONS and then select USER LOG.
All changes recorded are displayed in the user log.
4. Click OK.

How to view the User Log from Conference Booking

1. On the MEETING PLANNER menu click CONFERENCE BOOKING.
The Conference Booking search screen is displayed.
2. Search for and locate the required booking master.
3. Click the OPTIONS button and select USER LOG.
or
Click the EVENTS button, then click the OPTIONS button and select USER LOG.
All changes recorded are displayed in the user log.
4. Click OK.

User Log Display Options

Field Heading	Gives this information
Date	The date and time the change was made. This is the system date of the computer on which the change was made.
Text	A short description about the changes that were made.
User	The name of the user who made the change
Workstation	The Computer Name on which the change was made.

 The changes which are tracked are defined via the option USER LOG under Setup → Configuration → Users.

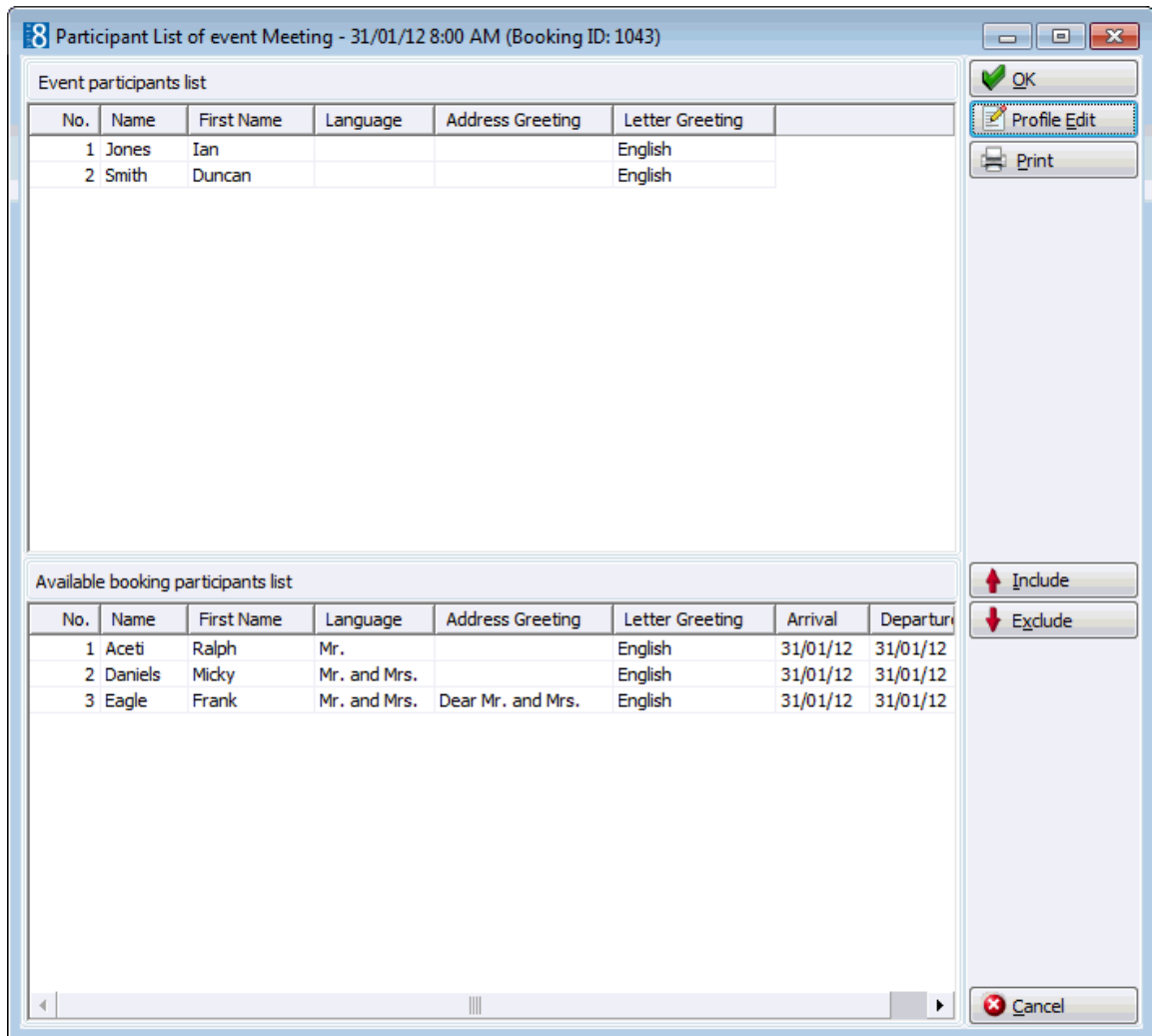
Events Participants List

This option is used to view the list of participants attending an event. The participants are entered on the booking master, and are automatically transferred from the booking level to each event.

How to create an event participant list

1. From the Event Details screen click OPTIONS and select PARTICIPANT LIST from the short-cut menu.

The Participant List for the selected event is displayed.



The screen is split into two sections:

- Event participants list - lists all the participants included on the participants list.
 - Available booking participants list - lists booked participants not yet included on the participants list
2. Select a participant from the AVAILABLE BOOKING PARTICIPANTS LIST and click INCLUDE to add a participant to the Event participants list.
 3. Select a participant from the EVENT PARTICIPANTS LIST and click EXCLUDE to remove the participant from the Events participants list.
 4. A profile can be edited by clicking PROFILE EDIT.
 5. Click PRINT to print a list of all attendees.
 6. Click OK. to save the participants list.

Note: It is not possible to have more participants than the number of attendees on the event level or the booking level, a warning message is displayed and the participant list has to be adjusted.

Financial Accounts

Financial Accounts are accounts that do not affect the properties availability and are used to post charges to non-guest accounts. For example, permanent accounts such as staff accounts, POS Accounts or other internal accounts used to post no-show and cancellation fees, corrections or charges for non staying guests. Financial Accounts are also used for conference bookings and conference telephone charges and internal lost postings such as interface late charges.

Note: In the Meeting Planner module the financial accounts option and postings functionality are available if the PMS license and/or the CCM Billing Component license are activated.

Financial accounts may be accessed via several options in Suite8:

- Reservations
- Front Desk
- Meeting Planner
- Cashiering

How to access via Reservations

The financial account option in reservations may be used to open, edit or create a financial account.

1. Click the RESERVATIONS menu and select FINANCIAL ACCOUNTS.

The Reservation Navigator screen is displayed defaulted to the Financial Accounts tab.

2. Click NEW to display the New Financial Account dialog box.

How to access via Front Desk

The financial account menu option in front desk may be used to open a new financial account.

1. Click the FRONT DESK drop down menu and select NEW FINANCIAL ACCOUNT.

The financial account dialog box is displayed.

An existing account may be edited by selecting the financial account page on the reservation navigator via the Arrivals or Inhouse Guests menu options.

How to access via Meeting Planner

There are several ways to access Financial Accounts from with the Meeting Planner module:

1. On the Conference Diary, right-click on a booking, select BOOKING OPTIONS to display the short-cut menu.

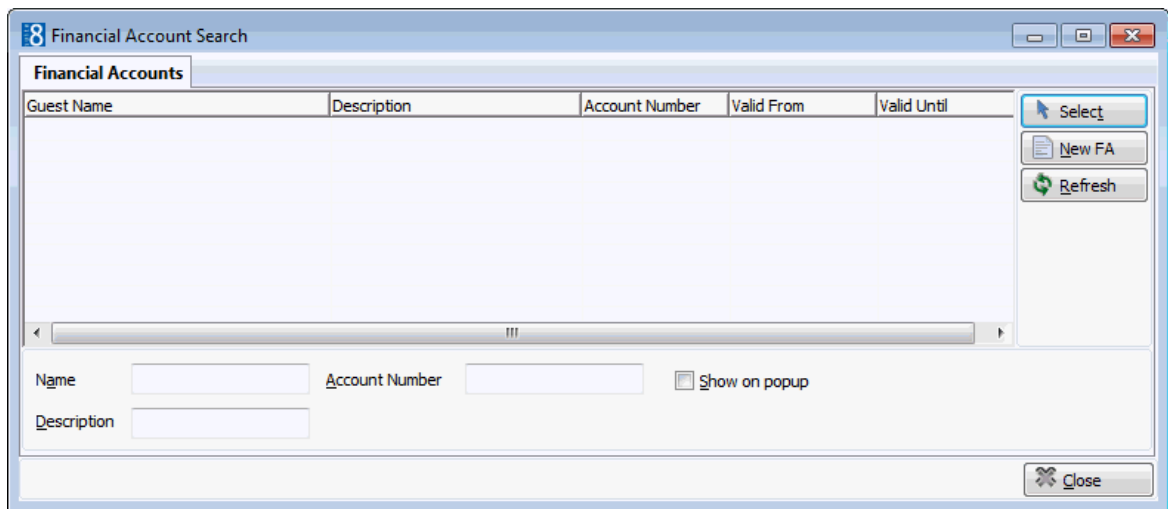
or

From Conference Booking, click EVENTS and select OPTIONS to display the short-cut menu.

or

From Event Management, select BOOKING MASTER and then select OPTIONS to display the short-cut menu.

2. Click FINANCIAL ACCOUNTS on the short-cut menu to display the Financial Accounts Search screen.



3. Click NEW FA to create a new financial account.

The financial account dialog box is displayed.

The search criteria, financial account Name, Description and Account Number allow the user to locate the required financial account easily. In addition selecting the option Show on pop-up will display all available financial accounts. This setting is saved for future use until changed by the user.

Note: The financial account can also be displayed via Event Management when selecting Postings. However, as this option allows postings you must enter a cashier number.

How to access via Cashiering

1. Click the CASHIER menu and select BILLING.
The Cashier Login screen is displayed.
2. Enter your CASHIER NUMBER and PASSWORD, click LOGIN.
The Billing Search screen is displayed.
3. Click NEW FA to display the New Financial Account dialog box.

How to create a new financial account

1. Access the New Financial Account dialog box via one of the access methods described above.

2. Complete the financial account details by typing information or selecting information from the drop-down lists.

For an explanation of the fields on the financial account screen, see the New Financial Account table below.

3. Click OK.

If the new financial account was created via cashiering then the posting screen is displayed.

New Financial Account dialog box

Fill in this field	With this information
Group	Select the type of financial account required from the list of predefined groups.
Date Range	If required select the date range check box and enter the date range (from/to) you would like to keep the Financial Account in your system. Usually it is not necessary to enter a date range on a financial account.
Profile	Each financial account must be linked to a profile; click the button next to the profile box to open the profile search screen and select an existing profile or create a new one.

Account Number	Each financial account must have an account number before it can be checked into the system. Click the drop-down arrow and select an account number; if the account number was defined with a description then this is updated in the NUMBER DESC. box.
Number Desc.	The description defined for this account number is displayed.
Market	If no default market code has been defined, click the drop-down arrow and select a market code. If this field is defined as mandatory then a market code has to be attached. When setting up a financial account in meeting planner the market is filled by default with the market segment from the booking master.
Description	Displays the financial account group and financial account number.
Credit Limit	Select a credit limit from the list box.
Limit Value	The credit value associated with the selected credit limit is displayed. This may be changed as required.
Transponder	The transponder card number is displayed if the financial account was created upon swiping or entering a transponder card. Note: This option only displayed if TRANSPONDER functionality is active.
Source Code	Select from a list of predefined source codes.
Channel Code	Select from a list of predefined channel codes.
Tax Exemption	Defines if the financial account is tax exempt.
Contracted Curr	Select the contracted currency for the financial account.
Billing Info	Enter any billing information, such as 'Room and Tax to Company'. The billing information is displayed in the billing screen on the standard HTML file.
Remarks	Enter any additional information. Remarks are displayed in the billing screen on the standard HTML file.

Note: If the start date selected equals the system date and the OK button is clicked, the financial account will be checked in. If the start date does not match the system date the financial account status will be 'Expected'.

How to edit financial account settings

1. Select the required financial account and click EDIT to display the Financial Account Settings dialog box.

In cashiering display the billing screen of the required financial account and click the FA SETTINGS button to display the Financial Account Settings dialog box.

In Meeting Planner display the Financial Accounts Search screen via one of the access methods described above, select the required financial account and click SELECT to display the Financial Account Settings dialog box.

The screenshot shows the 'Financial Account Settings' dialog box. The main area contains the following fields and values:

- Group: PM Accounts
- Date Range: 20/11/2011 - 20/11/2011
- Profile: MICROS-Fidelio GmbH, Ltd. Engineerin
- Account Number: 9090
- Number Desc.:
- Market: IND Individual
- Description: PM / 9090
- Credit Limit: CAS Creditlimit for Cash payments
- Limit Value: 500.00
- Source code: CON Conference Organisor
- Channel code: INT Internet
- Contracted Curr.: EUR Euro
- Billing Info:
- Remarks:

On the right side, there is a vertical toolbar with buttons: OK, Profiles, Billing Instr., Credit Cards, Fix. Charges, User Log, and Notes. At the bottom right, there is a Cancel button.

2. Make any changes necessary and click OK to close the financial account settings.

How to link profiles to financial accounts

This option is used to link Company, Agent, Source, Meeting Planner or Vendor profiles to the financial account.

1. Access the Financial Account Settings dialog box via one of the access methods described above.
2. Click PROFILES to display the Profile Select dialog box.
3. On the profile type required click the drop-down arrow.
The Profile Search dialog is displayed.
4. Search for the required profile, click SELECT.

The Profile Select dialog box is displayed with the profile selected.

5. Click OK to return to the Financial Account Settings dialog box.

How to unlink profiles to financial accounts

This option is used to unlink Company, Agent, Source, Meeting Planner or Vendor profiles to the financial account.

1. Access the Financial Account Settings dialog box via one of the access methods described above.
2. Click PROFILES to display the Profile Select dialog box.
3. Select the profile to be unlinked.
4. Click DELETE LINK.
5. Click OK to return to the Financial Account Settings dialog box.

How to enter notes for financial accounts

This option is used to add, edit, delete and view notes related to the selected financial account.

1. Access the Financial Account dialog box via one of the access methods described above.
2. Click NOTES to display the [Notes](#) (See page 119) dialog box.

See: Suite 8 Reservations manual for more details.

How to link billing instructions to financial accounts

This option is used to link billing instructions to the Financial Account.

1. Access the Financial Account Settings dialog box via one of the access methods described above.
2. Click BILLING INSTR. to display the [Billing Instructions](#) (See page 175) dialog box.

See: Suite 8 Reservations manual for more details.

How to link credit cards to financial accounts

This option is used to add, edit, delete, guarantee or get approval for credit cards. For example the charges of conference bookings or group members might be routed to a financial account and paid by a company credit card.

1. Access the Financial Account Settings dialog box via one of the access methods described above.
2. Click CREDIT CARDS to display the financial account credit cards dialog box.

See: Suite 8 Reservations manual for more details.

This option is only available if the status of the financial account is expected, checked in or closed.

How to enter fixed charges for financial accounts

This option is used to enter fixed charges on the Financial Account. Fixed charges are used to post daily charges other than room, tax or packages, for example conference equipment rental from external locations. Suite 8 posts fixed charges automatically during night audit or when choosing the option post daily charges in the cashiering module.

1. Access the Financial Account Settings dialog box via one of the access methods described above.
2. Click FIXED CHARGES to display the Fixed Charges dialog box.

See: *Suite 8 Reservations manual for more details.*

How to unlink a CCM financial account

1. Locate the required booking.
2. Click the OPTIONS button to display the short-cut menu.
3. Click FINANCIAL ACCOUNTS on the short-cut menu to display the Financial Accounts Settings dialog box.

The screenshot shows a software dialog box titled "8 Edit FA for booking Sales Training 2011 - 23/09/11 (ID: 1200)". The main area is labeled "Financial Account Settings" and contains the following fields:

- Group: PM Accounts
- Date Range: 08/09/2011 - 16/10/2011
- Profile: Thomas Cook
- Account Number: 9005
- Number Desc.: (empty)
- Market: TOU Tour Serie
- Description: Thomas Cook 100103
- Credit Limit: CCC Creditlimit for CC payments
- Limit Value: 1000.00
- Source code: COM Company
- Channel code: INT Internet
- Contracted Curr.: EUR Euro
- Billing Info: (empty)
- Remarks: (empty)

On the right side, there is a vertical toolbar with the following buttons: OK, Profiles, Billing Instr., Credit Cards, Fix. Charges, User Log, Unlink (highlighted), and Notes. At the bottom right is a Cancel button.

4. Click UNLINK, the message "Unlink CCM Booking?" is displayed to confirm the unlinking, select YES.
5. If no postings have been made the Financial Account will be unlinked. If postings have been made then a message is displayed to "Transfer postings of the selected booking?" select YES.
6. The cashier folio is displayed; click the TRANSFERS button to display the Transfer Posting dialog box.
7. In the To ROOM field select the account to transfer the postings to **or** create and then select a new financial account.
8. The charges may be transferred in the normal manner **or** transferred by checking the TRANSFER POSTINGS OF SELECTED CCM BOOKING check box. This option transfers all postings that have been made via the MANUAL POST option under the EVENTS menu.
9. Click OK to transfer the charges.

10. Click the CLOSE button to close the cashier screen.
11. Click OK on the Financial Account Settings dialog box to complete the transaction.

Note: Financial Accounts will be unlinked only when the OK button on the FA edit screen is pressed. If CANCEL is pressed then the FA is still linked even if postings have been transferred.

Note: Postings that have been made via the option POSTINGS on the OPTIONS menu are not linked to the CCM booking and posted directly to the Financial Account. These postings have to be transferred individually.

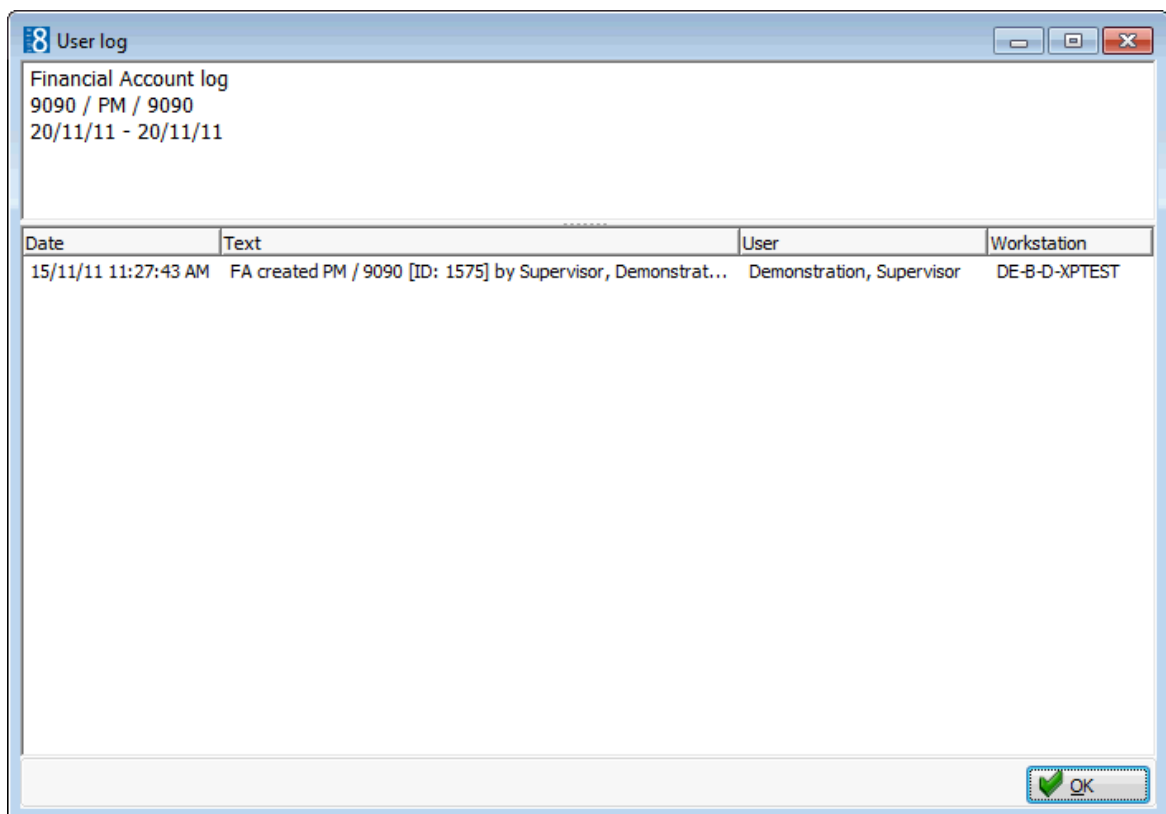
How to display the user log

This option is used to view the changes related to the selected financial account.

1. Access the Financial Account dialog box via one of the access methods described above.
2. Click USER LOG to display the User Log dialog box.

The User Log is displayed split into 2 sections:

- The upper section displays the name of the financial account and the arrival and departure dates.
- The lower section displayed information about the changes to this financial account.





3. Once all changes have been viewed, click OK to close the user log.

User Log Display Options

Field Heading	Gives this information
Date	The date and time the change was made. This is the system date of the computer on which the change was made.

Text	A short description about the changes that were made.
User	The name of the user who made the change.
Workstation	The computer name on which the change was made.

 The financial account groups and numbers are defined via the options FINANCIAL ACCOUNT GROUPS and FINANCIAL ACCOUNT NUMBERS under Setup → Configuration → Cashiering.

 Financial account functionality is controlled by the user rights VIEW, EDIT, INSERT and DELETE under Setup → Configuration → Users → User Definition → Rights → Cashiering → Financial Accounts.

Printing a Function Sheet or other Correspondence

See Printing a Function Sheet or other Correspondence (See page 74)

Forecast/Revenue

The FORECAST/REVENUE tab displays information about the posted, expected and forecasted revenue of each resource and is split as follows:

- Package items
- Non package items
- Merged packages

New entries are allowed for non package expected forecast.

The forecasted and posted figures are displayed both as a gross figure and a net figure with the tax displayed separately.

Resources		Forecast/ Revenue								
Department Code	Currency	Expected Per Pers.	Expected Flat Rate	Expected Total	Forecast	Net	Tax	Posted...	Net	Tax
<input type="checkbox"/> Total		7.50		375.00	375.00	315.13	59.88			
<input type="checkbox"/> Package Items		7.50		375.00	375.00	315.13	59.88			
Banquet Beverage	EUR	1.50		75.00	75.00	63.03	11.98			
Banquet Food	EUR	6.00		300.00	300.00	252.10	47.90			
Non Package Items										

New Edit Delete

Resources

Everything that gets booked to an event is known as a resource.

Typical resources are:

- Function Spaces (See page 147)
- Miscellaneous Items (See page 151) - such as decoration, technical equipment etc.
- Standard Menus (See page 158) - food and beverage items

Resources are displayed in the order in which they are booked and by default are grouped according to item type - all miscellaneous items together and all standard menu items together. A red arrow indicates that there are menu items linked to the resource.

The order of the resources can be changed by moving the items up and down on the resources grid or by clicking the column header. The order can be stored by selecting the option ALLOW USER SORTING from the right mouse short cut menu on the resource grid. The option RESTORE ORIGINAL SORTING from the right short cut menu on the resource grid, removes all customized sorting.

A resource can be attached to an event with a different date/time range then the event itself as resources are often required before an event starts and after the event has finished.

The following tasks are available on the RESOURCE tab:

- Add a new resource.
- Edit a resource.
- Delete a resource.
- Add notes to a resource.
- Access the Roomplanner module.
- Copy and paste resource information.
- Translate resource information.
- Printing menu cards

The FORECAST/REVENUE tab displays information about the posted, expected and forecasted revenue of each resource and is split into two parts:






- Package items
- Non package items

Note: Multiple resources can be selected and booked at the same time from different resource sections and categories. If several items are selected then the default values are taken for each resource. On the resources grid the QUANTITY and the PRICE can be adjusted directly. The PRICE cannot be adjusted if the resource is included in a package or if the selected standard menus are defined as on consumption base or where no or two menu splits have been defined.

Note: Rebates can be applied globally via a rebate code on the booking master or can be applied per resource as a percentage or as a flat rate.

If Alternative functionality is active then alternative resources can be defined; this enables the customer to reserve alternatives and make a final decision at a later date, for example, Resource I may be booked and Resource II reserved as an alternative.

The first booked resource cannot be set as an alternative as there are no other resources for it to be an alternative to. When at least one resource exists then the ALTERNATIVE option and the alternative selection box are displayed. The Alternative option can be selected without selecting a specific alternative or a specific alternative can be selected from the list of already booked resources.

-  Alternatives functionality is controlled by the parameter USE ALTERNATIVES under Setup → Configuration → Global Settings → CCM → Conference 1 tab.
-  Additional attributes to collect non-standard information about the resource can be added via the option ATTRIBUTE CATEGORIES under Setup → Configuration → CRM. To display the attribute category list box on the resource edit screen the option RESOURCE has to be selected.
-  For each attribute category defined a marketing info category is created. The elements for each new list box are defined via the option MARKETING INFO under Setup → Configuration → CRM.
-  Rebate functionality is controlled by the parameter ENABLE CARDLESS REBATE HANDLING under Setup → Configuration → Users → User Definition → Rights → Booking Master.
-  The adding, editing or removal of a rebate percentage or flat rate on a resource is controlled by the user right CHANGE REBATE FOR RESOURCES under Setup → Configuration → Users → User Definition → Rights → Booking Master.

Function Spaces

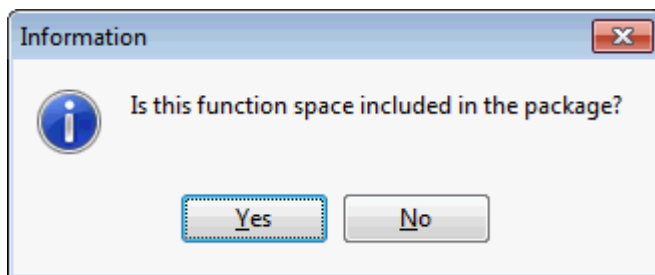
The function space details may need to be amended or an additional function space added to an event. These types of changes may be made in one of the following ways:

- Select an event and press EDIT. Changes such as seating arrangement or rate can be made on the function space information section on the lower part of the event screen.
- Select an event and select the function space from the resource grid and press EDIT.
- On the Conference Diary select the event, right-click to display the short-cut menu and select EDIT FUNCTION SPACE.

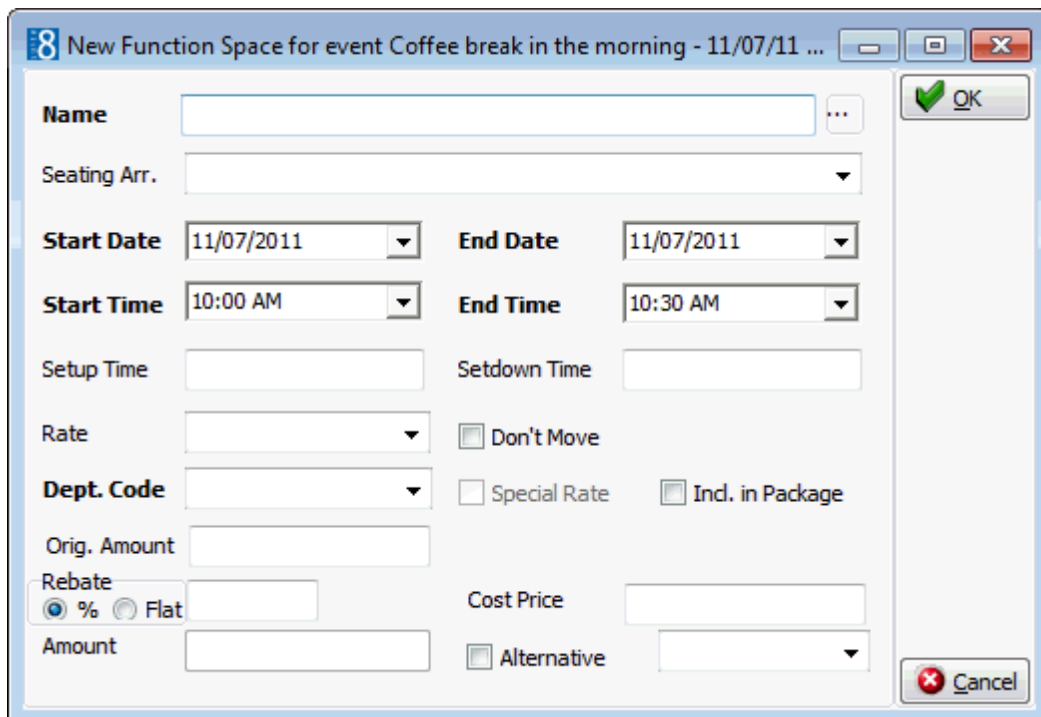
How to add a new function space

1. Select an event and click NEW FUNCTION SPACE from the bottom of the event edit screen.

If a Conference Package has been reserved then a message is displayed asking if the function space is included in the package.

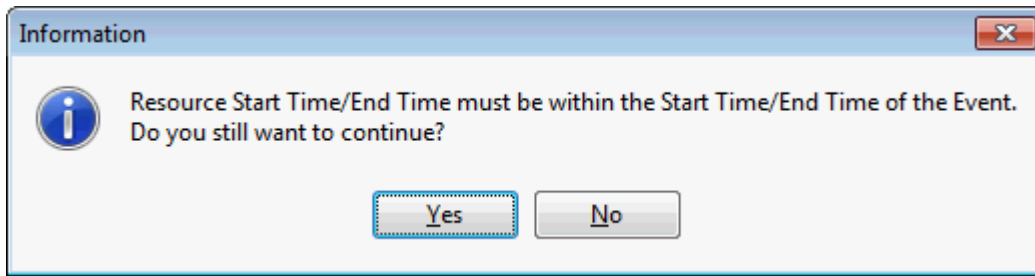


2. Click YES if the function space is included in the package, otherwise click No. The New Function Space dialog box is displayed.

A "New Function Space" dialog box for an event titled "Coffee break in the morning" on 11/07/11. The dialog box contains several fields and checkboxes. The "Name" field is empty. "Seating Arr." is a dropdown menu. "Start Date" and "End Date" are both set to 11/07/2011. "Start Time" is 10:00 AM and "End Time" is 10:30 AM. "Setup Time" and "Setdown Time" are empty. "Rate" is a dropdown menu. There are checkboxes for "Don't Move", "Special Rate", and "Ind. in Package". "Dept. Code" is a dropdown menu. "Orig. Amount" is empty. "Rebate" has radio buttons for "% (selected)" and "Flat". "Cost Price" is empty. "Amount" is empty. There is an "Alternative" checkbox and a dropdown menu. The dialog box has "OK" and "Cancel" buttons.

3. Complete the options as detailed in the Function Space dialog box table below:
4. Click OK to add the function space to the event.

If the time period for the function space being booked is either before or after the dates and time period of the event then a message is displayed.



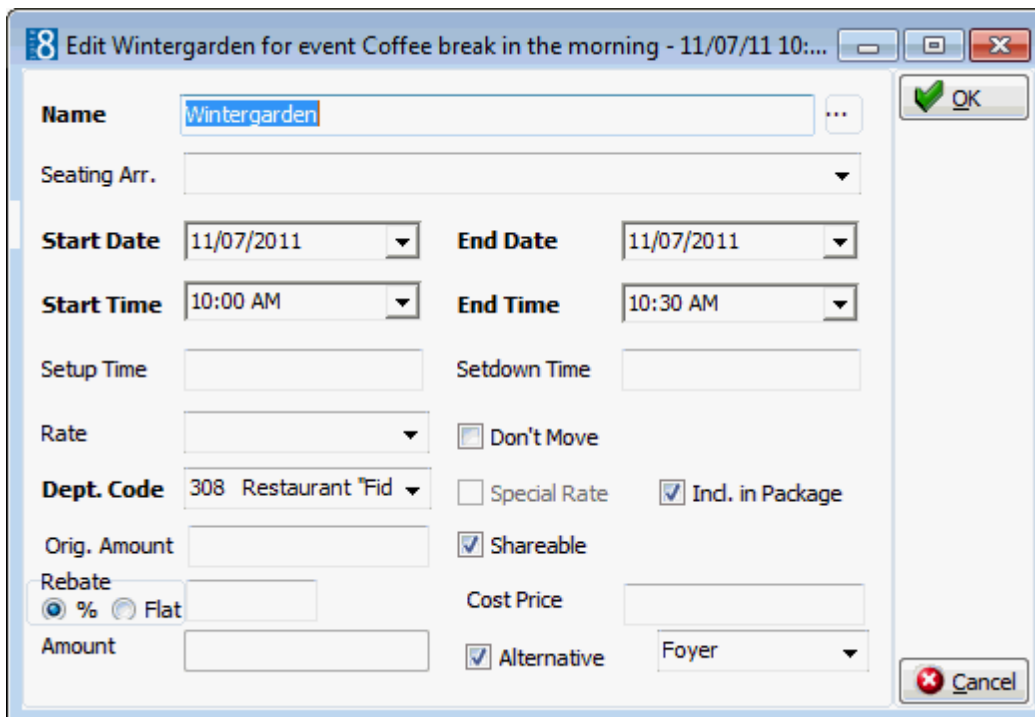
5. Select YES to continue with the resource booking; the event start and end dates/times are extended accordingly.

The function space is listed in the resource list and the Function Space column on the events grid now shows 'Multiple' to indicate that multiple function spaces are booked for this event.

Note: Resources are often required before an event starts and after the event has finished.

How to edit a function space

1. Select an event then select the function space to be edited on the resource grid.
2. Click EDIT from the bottom of the event edit screen, the Edit Function Space dialog box is displayed.



3. Make any necessary changes and click OK to save the changes.

Function Space dialog box

Field Name	Explanation
Name	Select the function space from the drop-down list of defined function spaces.
Seating Arrangement	Select the seating arrangement from the drop-down list. In some cases the seating arrangement might already be filled in, i.e. if the parameter flag: MULTIPLE FUNCTION SPACES PER EVENT has been activated under Setup → Configuration → Global Settings → Conference tab.
Start Date	The start date is filled automatically with the start date as defined in the event.
End Date	The end date is filled automatically with the end date as defined in the event.
Start Time	The start time from the event. The function space can not be booked outside the event start/end date and time.
End Time	The end time from the event. The function space can not be booked outside the event start/end date and time.
Setup Time	If the seating arrangements have been defined with default setup time, the default values will be filled in automatically, but can be changed at any time.
Set down Time	If the seating arrangements have been defined with default set down time, the default values will be filled in automatically, but can be changed at any time. Note: The function space will be booked from the event start until the event end time including the defined setup and set down time.
Rate	Select the rate from list box of defined rates, such as full day or half day. The rate codes are defined under Setup → Configuration → Conference Management → Function Spaces → Rate Codes. In some cases the rate might already be filled in, i.e. if the parameter MULTIPLE FUNCTION SPACES PER EVENT has been activated under Setup → Configuration → Global Settings → Conference tab.
Don't Move	This option should be marked if a customer insists on a particular function space. If this option is selected users will also see the indicator in the conference diary.
Dept Code	The department code is automatically completed with the department code entered on the function space definition.
Special rate	If a different rate has been entered in the amount box, this option will be selected.
Incl. in Package	Defines if the function space is included in a package. The option is only accessible if a conference package has been booked for this day.

Orig. Amount	Displays the amount being charged according to the selected rate code. It is also possible to change this amount with a special rate. The special rate field will be checked if this is the case.
Shareable	This option is displayed on function spaces which are defined as shareable.
Hourly Rate	Automatically selected if the rate selected is defined as an hourly rate in the setup. Can be changed as required.
Rebate % Flat	Defines whether the rebate calculation is by percentage or by flat rate and the percentage or flat rate amount to be used.
Cost Price	Displays the cost price for the function space.
Amount	Displays the amount being charged after the discount has been applied.
Alternative	Select this option to reserve an alternative function space; select a specific alternative space from the list of reserved function spaces. NOTE: This option is only displayed when at least one other function space has been reserved.

Function Space Selection List

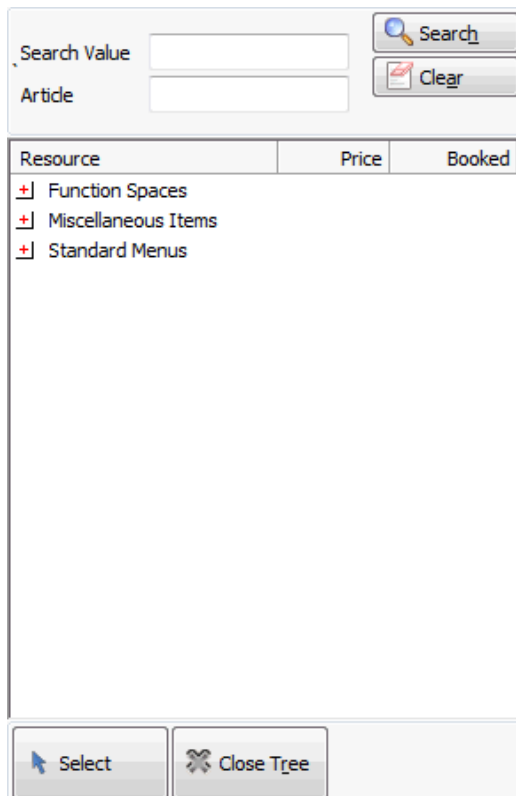
Field Name	Explanation
Function Space name	Enter the name of the function space if known.
Available	Select this option to show only those function spaces that are available on the booked date during the entered start/end times.
All	Select this option to show all function spaces. Function spaces that are not available will be highlighted in red.
Select	Click this button to select the highlighted function space.
Details	Click this button to view the configuration information such as measurements, rates or seating arrangements. If a picture of the function space is available then this can be viewed by selecting the EXTRA INFO tab.

Miscellaneous Items

Everything that gets booked to an event is known as a resource. Most events require specific items other than food and beverage, be it decoration for a wedding or technical equipment for a presentation. Any item which is not a food and beverage item or a function space is known as a miscellaneous resource.

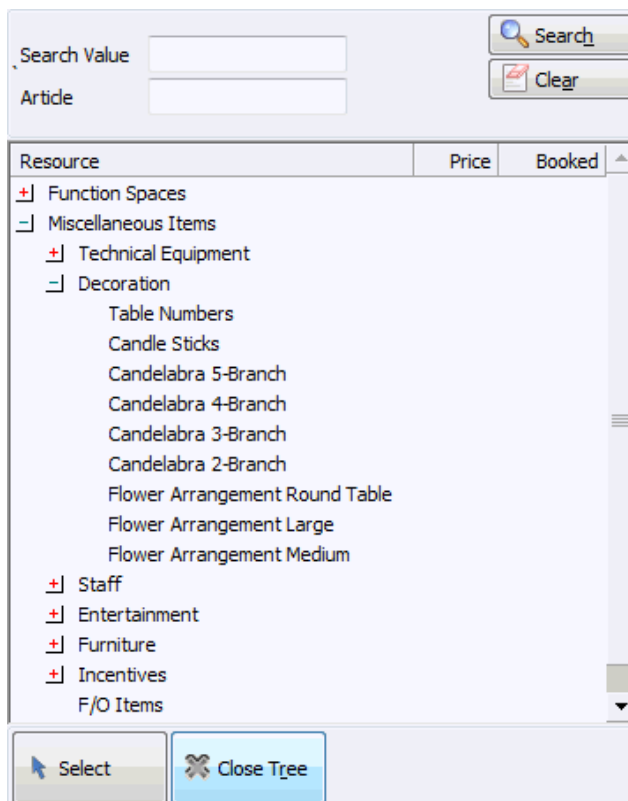
How to add a miscellaneous item

1. Select an event and click NEW RESOURCE from the bottom of the event edit screen.
2. The Function Spaces, Miscellaneous Items and Standard Menus categories are displayed on the left-hand side of the event edit screen.



3. Click on the + to list the Miscellaneous Items categories, select the required category and click on the + to list the details.

The width of the resource tree can be changed in order to see the full resource description; the last setting is saved per user.



4. Select the item by double-clicking or dragging the item to the resources grid, the Add Resource dialog box is displayed.

5. The NAME of the item is completed by default, but can be changed if required.
6. The QUANTITY completed by default depends on the setup of the item. If the item is configured on a PER PERSON basis then the QUANTITY is automatically completed with the number of event attendees; this can be changed by clearing the Per Person option and adjusting the quantity as required.

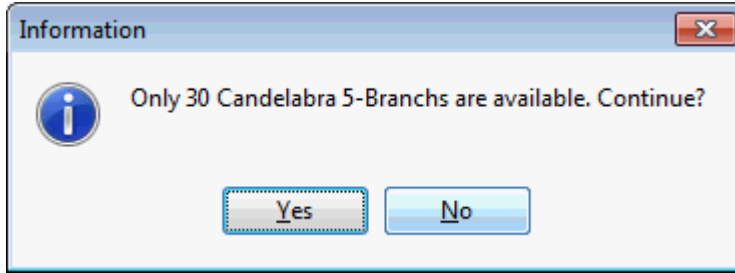
Note: Depending on the setup of the item, Suite8 will check if sufficient items are available (inventory control).

7. SELECT A RATE or enter a special PRICE. If the rate selected is defined as an hourly rate in the setup then the HOURLY RATE check box is automatically selected, but can be changed as required.
8. The ORIG. PRICE is completed with the amount being charged according to the selected rate code.
9. If a discount is to be applied, select % or FLAT and enter the discount percentage or flat rate amount.
10. The PRICE is completed with the amount being charged after the discount has been applied.
11. Select any ATTRIBUTES if applicable.
12. The DEPT. CODE is filled by default, select a different department code if required.
13. Select the ALTERNATIVE option to reserve an alternative item; select a specific alternative item from the list of booked miscellaneous items.

NOTE: This option is only displayed when at least one other miscellaneous item from the same category has been defined.

14. The additional description box is only displayed if the parameter DISPLAY STD. MENU & MISC. ITEM DESCRIPTION ON RESOURCES is active; the description may be changed as required.

15. Click OK to book the resource.
16. If there is not enough of the requested item in stock, an availability message is displayed.



16. Select YES to book the item regardless of the number available. On the resource grid in the column UNAVAILABLE, the number of unavailable items is displayed. If the message is answered with NO, the item will not be booked.

Note: The booked number of items will be shown in function sheets and contracts as the customer does not need to know whether or not certain items are in house or if they need to be ordered from an external company.

How to edit a miscellaneous item

1. Select an event then select the resource to be edited on the resource grid.
2. Click EDIT from the bottom of the event edit screen, the Edit Misc. Item dialog box is displayed.

 A screenshot of a software dialog box titled "Edit Candelabra 5-Branch for event Dinner - 15/02/12 7:00 PM (Bookin...)". The dialog has a standard Windows-style title bar with minimize, maximize, and close buttons. On the right side, there is a green checkmark icon and an "OK" button. The main area contains several input fields and checkboxes:

- Item Name:** A text box containing "Candelabra 5-Branch".
- Attribute:** A dropdown menu.
- Quantity:** A text box with "1", and checkboxes for "Per Person" and "External ?".
- Resp. Dept.:** A dropdown menu with "BAN" selected.
- Dept. Code:** A dropdown menu with "323 Banquet Misc." selected.
- Rate:** A dropdown menu.
- Ind. in Package:** A checked checkbox.
- Orig. Price:** A text box with "0".
- Special Price:** An unchecked checkbox.
- Cost Pr.:** A text box.
- Rebate:** Radio buttons for "% (selected)" and "Flat".
- Price:** A text box with "0".
- Total:** A text box with "0".
- Start Date:** A date picker showing "15/02/2012".
- End Date:** A date picker showing "15/02/2012".
- Start Time:** A time picker showing "7:00 PM".
- End Time:** A time picker showing "9:00 PM".
- Setup Time:** A text box.
- Setdown Time:** A text box.
- Alternative:** A dropdown menu.
- Resource Attributes:** A dropdown menu.
- Text Area:** A scrollable text area containing the text "Large Candelabra - only suitable for tables of 10 or more".

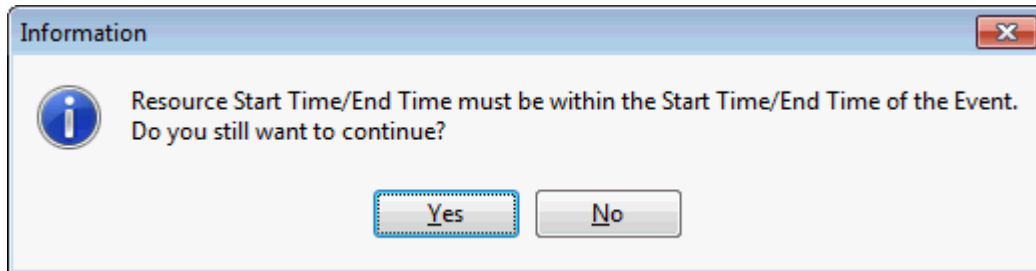
 At the bottom right, there is a red "X" icon and a "Cancel" button.

3. Make any necessary changes and click OK to save the changes.

How to book a miscellaneous item for before or after the event

1. Select an event then select the resource to be edited on the resource grid.
2. Click EDIT from the bottom of the event edit screen, the Edit Misc. Item dialog box is displayed.
3. Change the resource dates and/or times as required.

If the time period for the resource being booked is either before or after the dates and time period of the event then a message is displayed.



4. Select Yes to continue with the resource booking; the event start and end dates/times are extended accordingly.
5. Click OK to save the changes.

Note: Resources are often required before an event starts and after the event has finished.

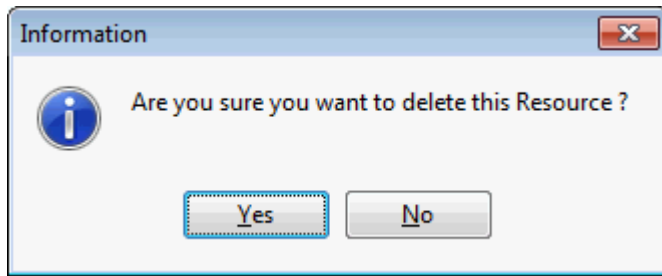
Edit Miscellaneous Resource Items dialog box

Field Name	Explanation
Item Name	The name of the item is completed by default, but can be changed if required.
Attribute	If for the miscellaneous item additional attributes have been defined, they can be selected from the drop down list. Attributes further describe or define the item.
Quantity	Enter the required quantity of the item.
Per Person	
External	Defines whether or not the item is an external one. If the item is defined as an external item, the external flag will be set automatically. If an item that is not been defined as external needs to be ordered from a third party company for a particular function, it can defined here.
Resp Dep.	Select a department responsible for the item from the list box. Will be filled automatically with the defaults from configuration.
Dept. Code	Select a department code from the drop-down list. Will be filled automatically with the defaults from configuration.
Rate	Select one of the pre-defined rates from the drop down list.
Incl. In Package	Defines if the miscellaneous item is included in a package. Please note that this field can only be accessed if a conference package has been booked for that day.
Hourly Rate	Automatically selected if the rate selected is defined as an hourly rate in the setup. Can be changed as required.

Orig. Price	Displays the amount being charged according to the selected rate code. It is also possible to change this amount with a special rate. The special rate field will be checked if this is the case.
Special Price	This box is selected as soon as an amount is entered in the price field.
Cost Price	
Rebate % Flat	Defines whether the rebate calculation is by percentage or by flat rate and the percentage or flat rate amount to be used.
Price	Displays the amount being charged after the discount has been applied.
Total	Displays the total amount being charged for the selected quantity.
Start Date	The start date from the event. View only field.
End Date	The end date from the event. View only field.
Start Time	The start time from the event. View only field. Please note that a resource can not be booked outside the event start/end date and time.
End Time	The end time from the event. View only field. Please note that a resource can not be booked outside the event start/end date and time.
Setup Time	The setup time entered on the configuration of the miscellaneous items. If an item with pre-defined setup time is booked, this field is filled automatically with the defaults, but can be changed or added at any time.
Set down Time	The set down time entered on the configuration of the miscellaneous items. If an item with pre-defined set down time is booked, this field is filled automatically with the defaults, but can be changed or added at any time.
Alternative	Select this option to reserve an alternative resource; select a specific alternative resource from the list of reserved resources. NOTE: This option is only displayed when at least one other resource from the same category has been reserved.
	The description is taken from the configuration but may be changed as required. Note: The additional description box is only displayed if the parameter DISPLAY STD. MENU & MISC. ITEM DESCRIPTION ON RESOURCES is active.

How to delete a miscellaneous/standard menu item

1. Select an event then select the resource to be deleted on the resource grid.
2. Click DELETE from the bottom of the event edit screen, a confirmation message is displayed.

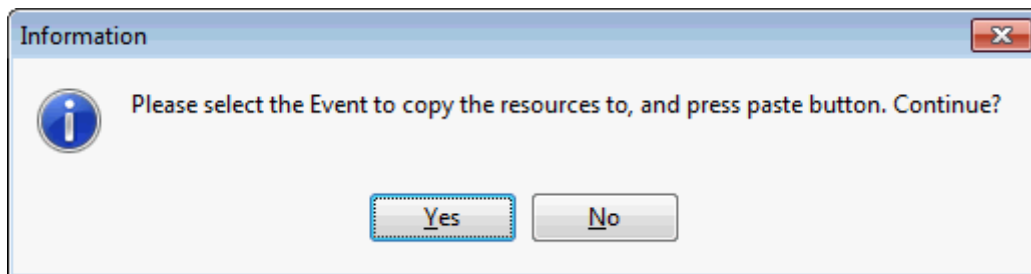


3. Select YES to delete the resource.

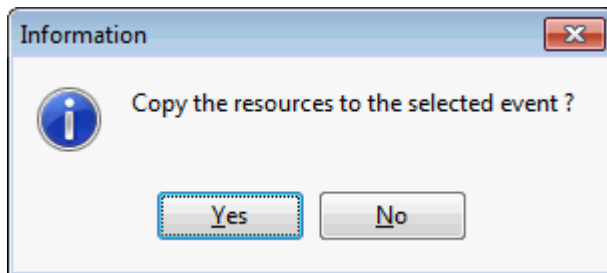
How to copy a miscellaneous/standard menu item

Booked items can be copied from one event to another, but only within the same booking.

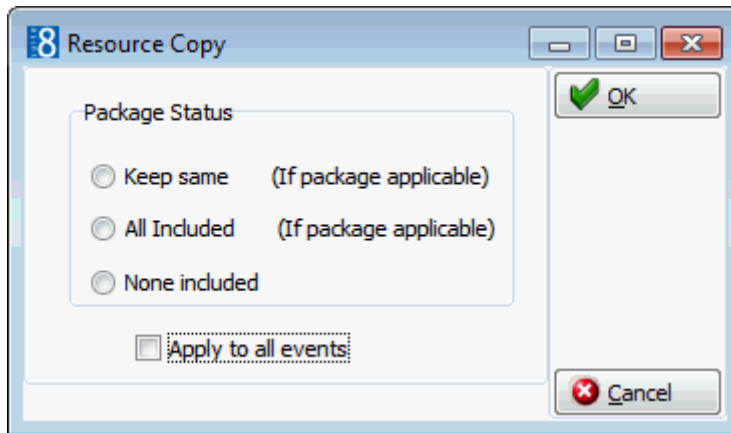
1. Select an event then select the resource to be copied on the resource grid.
2. Click OPTIONS from the bottom of the event edit screen and select COPY from the short-cut menu. A message is displayed asking you to select the event to copy the resource to and to press the paste button.



3. Select YES to continue.
4. Select the event to which the resource is to be copied to, click OPTIONS from the bottom of the event edit screen and select PASTE from the short-cut menu. A confirmation message is displayed.




5. Select YES to copy the resource; a processing message and a package status selection screen are displayed,



6. Select the required package status and if the resource copy should be applied to all events, click OK.

The resource is listed in the resource grid of the selected event.

Note: Multiple miscellaneous items can be selected at the same time from different categories. If several items are selected then the default values are taken for each miscellaneous item. On the resources grid the QUANTITY and the PRICE can be adjusted directly.

-  The display of the description of standard menu and miscellaneous menu items in booked resources is controlled by the parameter DISPLAY STD. MENU & MISC. ITEM DESCRIPTION ON RESOURCES under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

Standard Menus

Most properties sell a number of standard or set menus which usually consist of several courses and have a single price.

How to add a standard menu resource

1. Select an event and click NEW RESOURCE from the bottom of the event edit screen.
2. The Function Spaces, Miscellaneous Items and Standard Menus categories are displayed on the left-hand side of the event edit screen.

Search Value	<input type="text"/>	<input type="button" value="Search"/>
Article	<input type="text"/>	<input type="button" value="Clear"/>

Resource	Price	Booked
+ Function Spaces		
+ Miscellaneous Items		
+ Standard Menus		

<input type="button" value="Select"/>	<input type="button" value="Close Tree"/>
---------------------------------------	---

- Click on the +| to list the Standard Menu categories; all the configured menu categories such as Receptions, Buffets, Coffee Breaks, Lunch and Dinner Menus will be displayed. Select the required category and click on the +| to list the menus and the default price.

The width of the resource tree can be changed in order to see the full resource description: the last setting is saved per user.

Search Value
 Article

Resource	Price	Booked
+ Function Spaces		
+ Miscellaneous Items		
- Standard Menu		
+ Receptions		
+ Titles - Beverages		
+ Canapes		
+ Coffee breaks		
- Buffets		
+ Buffet 1	35.00	
+ Buffet 2	40.00	
+ Buffet 3	45.00	
+ Menus		
+ Titles - Food		

Note: Menus consist of menu items, select a menu and click on the +| to list the menu items attached to the menu. A hint box displays the full description for menu items with a long description. The price displayed in the resource tree is the default price. The price for an outlet is displayed when selecting the menu and the specific outlet.

4. Select the item by double-clicking or dragging the item to the resources grid, the Add Resource dialog box is displayed.

8 Add The Fruity for event Meeting - 06/07/11 9:00 AM (Booking ID: 1026)

Name: The Fruity

Quantity: 14

Price: 38.00 Charged on Consumption

Outlet: Cost Price: 3.25

Alternative:

Menu Price Split		Orig. Price	Rebate	Price
322	Banquet Beverage	36.00	<input checked="" type="radio"/> % <input type="radio"/> Flat	36.00
		Total Food: 504.00		
323	Banquet Misc.	2.00	<input checked="" type="radio"/> % <input type="radio"/> Flat	2.00
		Total Beverage: 28.00		

Health breakfast with multi-vitamin juices and fruit basket.

OK Cancel

- Complete the options as detailed in the Standard Menu Add Resource dialog box table below:
- Click OK to book the resource.

Note: Multiple menu items can be selected at the same time. If several menu items are selected then the default values are taken for each menu item and the Add Resource dialog box is not displayed.

Note: When posting standard menus with one menu price split, the department code of the split will be displayed in the posting screen. When posting standard menus where there are two menu price splits, the department code defined in the parameter DEFAULT DEPT. CODE FOR MENU on the CCM tab under global settings will be displayed in the posting screen.

How to edit a standard menu resource

- Select an event then select the standard menu resource to be edited on the resource grid.
- Click EDIT from the bottom of the event edit screen, the Edit Standard Menu dialog box is displayed.

8 Edit Menu III for event Dinner Meeting 2 - 08/07/11 7:00 PM (Booking ID: 1206)

Name Menu III OK

Cons. Base Outlet Incl. in Package Gratuity Incl. ?

Menu Price 60.00 <General Ra Menu Item Price 20.00

	Menu Price Split	Orig. Price	Rebate	Price
Quantity	480.00	321 Banquet Food	60.00 <input type="radio"/> % <input checked="" type="radio"/> Flat	60.00
Compl. Menus	0.00	0	Rebate <input type="radio"/> % <input checked="" type="radio"/> Flat	
Cost Price	0.00	Total Rebate Food		Total Food 28800.00
		Total Rebate Bev.		Total Bev.

Exp. 480 Gtd. Post Gtd. Set 480.00 Act

Start Date 08/07/2011 **End Date** 08/07/2011

Start Time 7:00 PM **End Time** 9:00 PM

Serve Start 7:00 PM **Serve End** 9:00 PM

Course	Order	Quantity	Menu Item Name	Incl.?	Price	Alternative
1	0	480	King prawns with ...		4.00	
2	0	480	Creamy soup of c...		3.00	
3	0	480	Beef fillet with tru...		10.00	
4	0	480	Crepes Suzette		3.00	

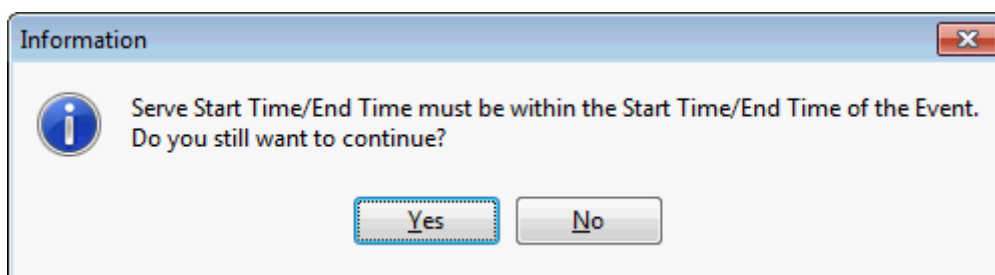
New
Edit
Translate
Delete
Cancel

3. Make any necessary changes and click OK to save the changes.

How to book a standard menu item for before or after the event

1. Select an event then select the standard menu resource to be edited on the resource grid.
2. Click EDIT from the bottom of the event edit screen, the Edit Standard Menu dialog box is displayed.
3. Change the standard menu dates and/or times as required.

If the time period for the standard menu being booked is either before or after the dates and time period of the event then a message is displayed.



4. Select YES to continue with the standard menu booking; the event start and end dates/times are extended accordingly.
5. Click OK to save the changes.

Note: Resources are often required before an event starts and after the event has finished.

Standard Menu Add Resource dialog box

Field	Definition
Name	The name of the standard menu is completed by default, but may be changed as required.
Quantity	The quantity of the standard menu is taken from the number of attendees defined on the event, but can be changed if required.
Price	The price of the standard menu; if a discount is applied then the discounted price is displayed.
Charged on Consumption	Defines if the standard menu is charged on a consumption basis such as cocktail receptions or open bars. Note: If a standard menu is defined and booked as CHARGED ON CONSUMPTION, no menu price will be booked as it will be charged according to consumption based on the prices of the individual menu items.
Outlet	Defines if the menu price is for a specific outlet, e.g. bar, restaurant or banqueting.
Cost Price	The cost price of the menu item.
Alternative	Select this option if an alternative menu is required; select the menu from the list of reserved menus. NOTE: This option is only displayed when at least one other standard menu from the same category menu category has been defined.
Menu Price Split	Defines how much of the standard menu price should be charged to each department code. The price may be split between a food department code and a beverage department code; the setup is the same for both codes. For example, a standard menu may include a glass of wine; so 95% of the menu price may be allocated to a food department code and the remaining 5% allocated to a beverage department code. <ul style="list-style-type: none"> ▪ When posting standard menus with one menu price split, the department code of the split will be displayed in the posting screen.





	<ul style="list-style-type: none"> When posting standard menus where there are two menu price splits, the department code defined via the parameter DEFAULT DEPT. CODE FOR MENU is displayed in the posting screen. <p>Note: The entered menu price split must equal the total menu price.</p>
(Department Code - Food) (Department Code - Beverage)	The first department code for the menu price split is usually a food department code and the second one a beverage department code.
Orig. Price	Displays the original price of the menu item before any discounts are applied.
Rebate	Defines whether a rebate is to be applied and if the rebate calculation is by % or a FLAT rate.
	The percentage or flat rate amount to be applied.
Price	Displays the price of the menu item after the discount has been applied.
Total Rebate Food/Bev.	If a FLAT amount rebate is applied then the total amount of the rebate is displayed.
Total Food/Beverage	Displays the total price to be charged for food/beverage for the quantity booked.
(Description)	Displays a description of the standard menu as defined in the configuration; this may be changed as required. Note: The additional description box is only displayed if the parameter DISPLAY STD. MENU & MISC. ITEM DESCRIPTION ON RESOURCES is active.

Standard Menu Edit dialog box

Option	Explanation
Name	The name of the standard menu.
Cons. Base	Defines if the standard menu is charged on a consumption basis such as cocktail receptions or open bars. Note: If a standard menu is defined and booked as CHARGED ON CONSUMPTION, no menu price will be booked as it will be charged according to consumption based on the prices of the individual menu items.
Incl. in Package	Defines if the standard menu is included in a package Note: This option is only available if a conference package has been booked for that day.
Gratuity Incl?	Defines if the gratuity is included in the price.
Menu Price	The price of the standard menu; if a discount is applied then the discounted price is displayed.
Outlet	Defines if the menu price is for a specific outlet, e.g. bar, restaurant or banqueting.
Menu Item Price	This option is view only and shows the sum of all menu items.

	This can be used to compare the sum of the menu items and the actual menu price; especially useful if menu items are exchanged for more expensive ones. The menu item price field will always show the revenue margin.
Quantity	Booked quantity of the standard menu; the number of attendees defined on the booking master.
Compl. Menus	Defines the number of complimentary menus if applicable.
Cost Price	The cost price of the menu item.
Menu Price Split	<p>Defines how much of the standard menu price should be charged to each department code. The price may be split between a food department code and a beverage department code; the setup is the same for both codes.</p> <p>For example, a standard menu may include a glass of wine; so 95% of the menu price may be allocated to a food department code and the remaining 5% allocated to a beverage department code.</p> <ul style="list-style-type: none"> ▪ When posting standard menus with one menu price split, the department code of the split will be displayed in the posting screen. ▪ When posting standard menus where there are two menu price splits, the department code defined via the parameter DEFAULT DEPT. CODE FOR MENU is displayed in the posting screen. <p>Note: The entered menu price split must equal the total menu price.</p>
(Dept. Code - Food) (Dept. Code - Beverage)	The first department code for the menu price split is usually a food department code and the second one a beverage department code.
Orig. Price	Displays the original price of the menu item before any discounts are applied.
Rebate % Flat	Defines whether a rebate is to be applied and if the rebate calculation is by % or a FLAT rate.
	The percentage or flat rate amount to be applied.
Price	Displays the price of the menu item after the discount has been applied.
Total Rebate Food/Bev.	If a FLAT amount rebate is applied then the total amount of the rebate is displayed.
Total Food/Total Bev.	Displays the total price to be charged for food/beverage for the quantity booked.
Exp	The expected number of people, if more than booked the kitchen can prepare.
Gtd	Guaranteed number of people. Normally the number of attendees that will be charged even if less will attend.
Post Gtd.	Defines if the guaranteed number of persons will be posted. The guaranteed number will be posted only if the guaranteed number is greater than quantity. If nothing is entered or the guaranteed is less than quantity the value from field QUANTITY will be taken. The option can be selected by default through the configuration or set manually as required.

Set	Set number of people – if more than expected or guaranteed should be set for.
Act	Displays the actual number of people that attended the event.
Start/End Date	View only fields. The start/end date is taken from the event.
Start/End Time	View only fields. The start/end time is taken from the event.
Serve Start/End	Defines at what time the menu should be served and/or until which time.
Alternative	Select this option if an alternative menu is required; select the menu from the list of reserved menus. NOTE: This option is only displayed when at least one other standard menu from the same category menu category has been defined.
(Description)	Displays a description of the standard menu as defined in the configuration; this may be changed as required. Note: The additional description box is only displayed if the parameter DISPLAY STD. MENU & MISC. ITEM DESCRIPTION ON RESOURCES is active.
Course Display	Display of the course order, quantity, menu item name and price.

-  The display of the description of standard menu and miscellaneous menu items in booked resources is controlled by the parameter DISPLAY STD. MENU & MISC. ITEM DESCRIPTION ON RESOURCES under Setup → Configuration → Global Settings → CCM → Conference 1 tab.
-  Alternatives functionality is controlled by the parameter USE ALTERNATIVES under Setup → Configuration → Global Settings → CCM → Conference 1 tab.
-  When posting standard menus where there are two menu price splits, the posting's are displayed on the posting screen with the department code defined via the parameter DEFAULT DEPT. CODE FOR MENU under Setup → Configuration → Global Settings → CCM → Conference 1 tab.
-  The display of the Post Gtd. option by default is controlled by the parameter POST STD MENU GUARANTEED VALUE under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

Menu Items

Most properties sell a number of standard or set menus which consist of several courses and have a single price. When a customer is selecting a menu for a function they may choose one of the standard menus available and then make changes or add additional menu items. For example, a customer may choose Menu I but want to include Chocolate Mouse which is part of Menu II. An additional menu item would normally be selected from the pre-defined list of menu items, however in some cases a custom menu item needs to be added, this is a menu item that has not been pre-configured. Custom menu items are defined as special or one-off menu items.

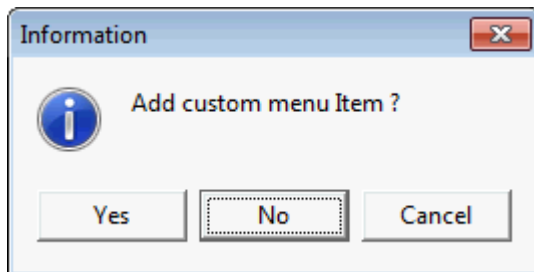
How to add a pre-defined menu item

1. Select an event then select the standard menu resource to be edited on the resource grid.
2. Click EDIT from the bottom of the event edit screen, the Edit Standard Menu dialog box is displayed.
3. On the bottom of the standard menu edit screen, the courses of the standard menu are displayed.

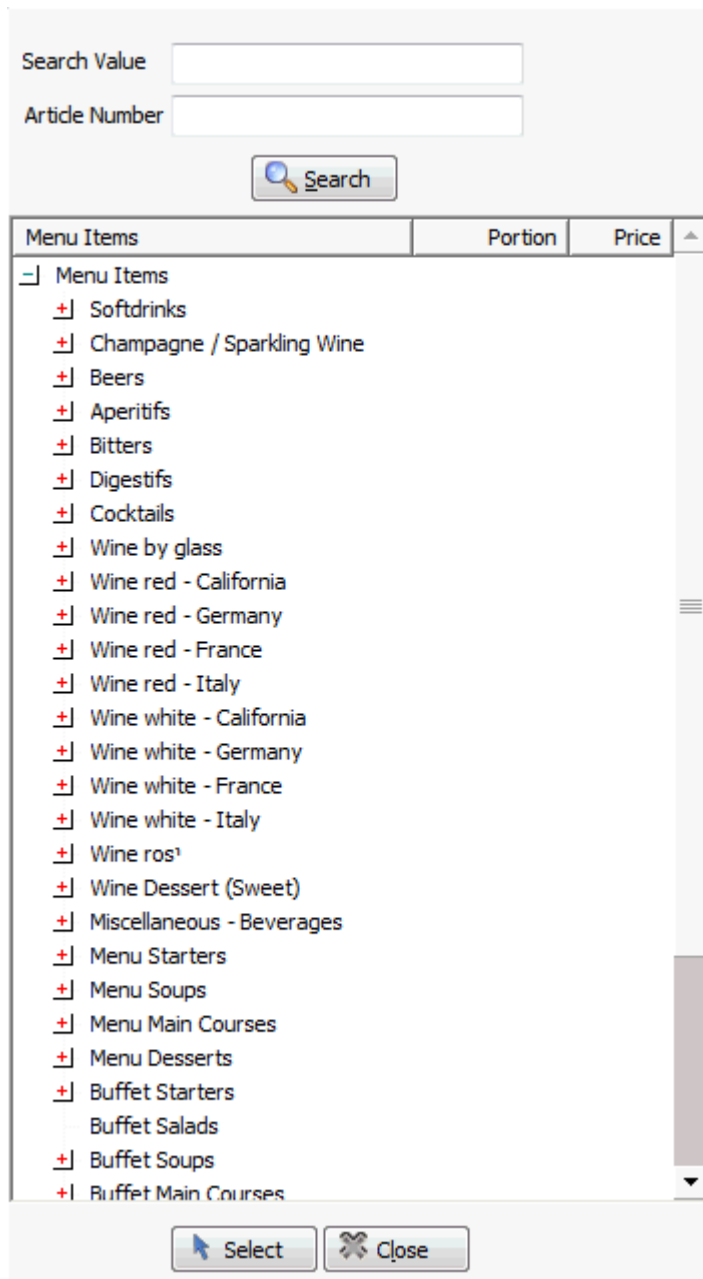
Course	Order	Quantity	Menu Item Name	Ind.?	Price	Net	Vat	Alternative
1	0	10	'Caesar Salad' with Dijon-mustard d...		10.00	8.40	1.60	
1	2	10	or		10.00	8.40	1.60	
1	3	10	tomato soup		10.00	8.40	1.60	
2	0	10	Red Snapper with red curry and limes		10.00	8.40	1.60	
3	0	10	Parfait of coffee with oranges		10.00	8.40	1.60	

New
Edit
Translate
Delete

4. Click NEW to add a new menu item. A message is displayed asking you are adding a custom menu item.



5. Select YES to add a menu item that has not yet been defined.
6. Click No to select from the list of already defined menu items. The menu categories are displayed grouped by food and beverage, on the right-hand side of the edit standard menu screen.



7. Click on the **+** next to a menu category to list all the items belonging to that category. The price displayed in the resource tree is the default price. The price for an outlet is displayed when selecting the item and the specific outlet.
8. Select the menu item by dragging the item to the course listing grid on the edit standard menu dialog box, double-clicking or clicking **SELECT**. The Add Resource dialog box is displayed.

9. Enter the COURSE number.
10. Enter the COURSE ORDER, for example, if there are two starters; define the first one with course order 0 and the second one with course order 1.
11. The NAME of the item is completed by default, but can be changed if required.
12. The QUANTITY of the item is taken from the number of attendees on the event, but can be changed if required.
13. Prices may vary per outlet so select an OUTLET if applicable, e.g. bar, restaurant or banqueting.
14. Select the INCLUDED option if the item is to be included in the standard menu. If not selected then the item will be charged separately.
15. Enter the PRICE if applicable.
16. Enter the COST PRICE if applicable.
17. The DEPT. CODE is filled by default, select a different department code if required.
18. Click OK, the new menu item is added to the course listing on the edit standard menu dialog box.
19. Click CLOSE to close the pre-defined menu items listing.

Add Resource dialog box - Pre-Defined Menu Items

Field	Definition
Course	Defines the menu course of this newly booked menu item.
Course Order	Used to further define the order. For example if there are two starters: Define the first one with course order 0, the second with 1.
Name	The name of the menu item.
Quantity	The quantity, default is number of attendees entered on the booking master.
Spl Price?	The special price field is checked if an amount is entered in the price field.
Outlet	Defines if the item price is per a specific outlet, e.g. bar, restaurant or banqueting

Included?	Determines if the newly booked menu item is included in the standard menu (included in the price) or if it will be charged separately (in addition to the price).
Price	The price to be charged for this menu item.
Cost Price	The cost price of the menu item.

How to add a custom menu item

1. Select an event then select the standard menu resource to be edited on the resource grid.
2. Click EDIT from the bottom of the event edit screen, the Edit Standard Menu dialog box is displayed.
3. On the bottom of the standard menu edit screen, the courses of the standard menu are displayed.

Course	Order	Quantity	Menu Item Name	Ind.?	Price	Net	Vat	Alternative
1	0	10	'Caesar Salad' with Dijon-mustard d...		10.00	8.40	1.60	
1	2	10	or		10.00	8.40	1.60	
1	3	10	tomato soup		10.00	8.40	1.60	
2	0	10	Red Snapper with red curry and limes		10.00	8.40	1.60	
3	0	10	Parfait of coffee with oranges		10.00	8.40	1.60	

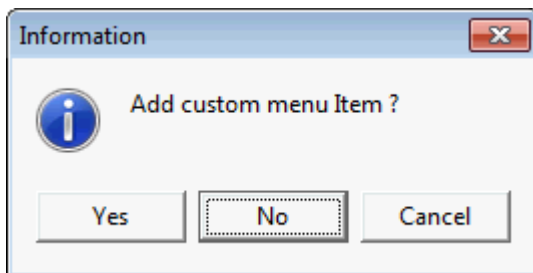
New

Edit

Translate

Delete

4. Click NEW to add a new menu item. A message is displayed asking you are adding a custom menu item.



5. Select YES to add a menu item that has not yet been defined, the custom menu item configuration dialog box is displayed.

8 New Menu Item for Menu I of event Dinner - 15/02/12 7:00 PM (B...

Category Beverage Food

Course 0 Course order 0

Menu Item Name 1

Menu Item Name 2

Menu Item Name 3

Menu Item Name 4

Description

Origin 1

Origin 2

Origin 3

Year

Resp. Department

Dept. Code

Portion

Ind. in Menu ?

Outlet Cost Price 0

Orig. Price 0 Quantity 10

Rebate % Flat 0 Total Rebate 0

Price 0 Total 0

Alternative

Ok

Cancel

6. Complete the options as detailed in the table below:
7. Click OK, the new custom menu item is added to the course listing on the edit standard menu dialog box.

Note: This item has only been created for this event (standard menu) and is not part of the pre-defined list of menu items.

Custom Menu Item dialog box

Field	Definition
Category – Beverage/Food	Defines if the item is either a food or a beverage item.
Course	Defines the menu course of this customised menu item.
Course order	Used to further define the order. For example if there are two starters: Define the first one with course order 0, the second with one.
Menu Item Name 1-4	Defines the appearance of the item on the function sheet.
Description	Used to add additional information about the item.
Origin 1 - 3	Only used for beverages, mostly wines to further define the origin of the wine or vinery.
Year	Only used for beverages, mostly wines to define the year.
Resp. Department (Required)	Defines the responsible department such as the kitchen.
Dept. Code (Required)	Defines the department code which should be used for postings, for example, room rental or a food or beverage department code.
Portion	Defines how the item is portioned. Most useful for beverage items to define whether it is by glass or bottle.
Incl. in Menu?	Defines if the price of the menu item is included in the menu. Generally used for food items and mainly used in properties that sell set menus, where the food item is always included in a menu and is not priced individually. When selecting the menu from the booking, it is still possible to change this item to exclude.
Outlet	Defines if the item price is per a specific outlet, e.g. bar, restaurant or banqueting
Cost Price	The cost price of the menu item.
Price	The sales price for this item.
Quantity	The quantity, this is filled automatically with the number of attendees, but may be changed as required. A number including decimals may be entered.

How to edit a menu item

1. Select an event then select the standard menu resource to be edited on the resource grid.
2. Click EDIT from the bottom of the event edit screen, the Edit Standard Menu dialog box is displayed.
3. On the bottom of the standard menu edit screen, the courses of the standard menu are displayed.
4. Select the standard menu item to be edited, click EDIT, the resource item edit dialog box is displayed.

5. Make any necessary changes and click OK to save the changes.

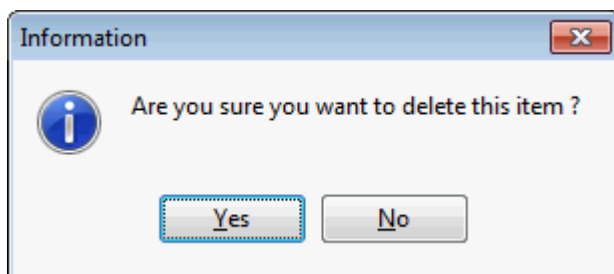
Resource Item dialog box

Field	Definition
Category - Beverage/ Food	Defines if the item is either a food or a beverage item.
Course	Defines the menu course of this customised menu item.
Course order	Used to further define the order. For example if there are two starters: Define the first one with course order 0, the second with one.
Menu Item Name 1-4	Defines the appearance of the item on the function sheet.
Description	Used to add additional information about the item.
Origin 1 - 3	Only used for beverages, mostly wines to further define the origin of the wine or vinery.
Year	Only used for beverages, mostly wines to define the year.
Resp. Department	Defines the responsible department such as the kitchen.

(Required)	
Dept. Code (Required)	Defines the department code which should be used for postings, for example, room rental or a food or beverage department code.
Portion	Defines how the item is portioned. Most useful for beverage items to define whether it is by glass or bottle.
Incl. in Menu?	Defines if the price of the menu item is included in the menu. Generally used for food items and mainly used in properties that sell set menus, where the food item is always included in a menu and is not priced individually. When selecting the menu from the booking, it is still possible to change this item to exclude.
Price	The sales price for this item.
Quantity	The quantity, this is filled automatically with the number of attendees, but may be changed as required. A number including decimals may be entered.

How to delete a menu item

1. Select an event then select the standard menu resource to be edited on the resource grid.
2. Click EDIT from the bottom of the event edit screen, the Edit Standard Menu dialog box is displayed.
3. On the bottom of the standard menu edit screen, the courses of the standard menu are displayed.
4. Select the menu item to be deleted, click DELETE, a confirmation message is displayed.



5. Select YES to delete the menu item.

How to print menu cards

1. Select an event, the resources are listed in the resources grid.
2. Select one or more standard menu items to be included in the menu card.
3. Click MENU CARDS from the bottom of the event edit screen, the Print dialog box is displayed.
4. In the TEMPLATES box click the drop-down arrow and select the template to be used.
5. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
6. Click PRINT to print the menu card or click PREVIEW to display the menu card on the screen.
7. Click CLOSE to close the Print dialog box.

Available Menu Cards

The difference between SGL and MPL is the layout - MPL reports can be used for buffets, long menus or multiple menus.

Report Name	Menu Card	
	Left Side	Right Side
FCR_CCM_9970_MENU CARD_BEV_FOOD_SGL.rpt	Beverage	Food
FCR_CCM_9971_MENU CARD_BEV_FOOD_MPL.rpt	Beverage	Food
FCR_CCM_9972_MENU CARD_EV_FOOD_SGL.rpt	Event Info	Food
FCR_CCM_9973_MENU CARD_EV_FOOD_MPL.rpt	Event Info	Food
FCR_CCM_9974_MENU CARD_NOTES_FOOD_SGL.rpt	Menu Notes	Food
FCR_CCM_9975_MENU CARD_NOTES_FOOD_MPL.rpt	Menu Notes	Food
FCR_CCM_9976_MENU CARD_EV_BEV_MPL.rpt	Event Info	Beverage
FCR_CCM_9977_MENU CARD_NOTES_BEV_MPL.rpt	Menu Notes	Beverage

Activities & Tasks linked to a Booking Master

Use this option to view, edit, delete or create new activities and/or tasks that are specific to the booking. A typical example for an activity linked to a booking master would be a 'follow up' activity on the signed contract.

Click the ACTIVITY/TASKS button on the right hand side of the booking grid to view, edit, delete or create a new activity or task.

Note: Changing the company/contact on a booking will change the company/contact on any linked tasks or activities.

Options

Billing Instructions

When a financial account is linked then billing instructions can be used to enter instructions to automatically route specific department codes to a different billing window, room or financial account. For example if the company will pay for the room rental and charges attached to the booking, such as lunch and equipment rental, then you would enter billing instructions to automatically route these charges to a different billing window. If no financial account is linked then the billing instructions are used as general information.

How to enter a new billing instruction

1. On the conference diary screen, highlight an event.
2. Right-click to display the short-cut menu, select **BOOKING OPTIONS** and then select **BILLING INSTRUCTIONS**.

Any existing billing instructions are listed.

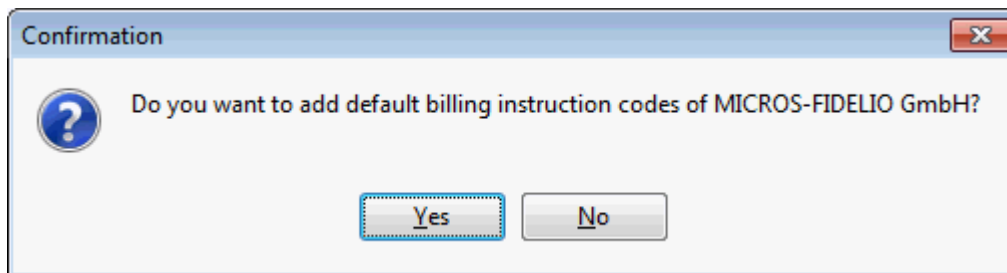
3. Click the **NEW** button to display the New/Edit Billing Instruction dialog box.

The screenshot shows a dialog box titled "New Billing Instruction for booking Department Head Meet...". It has a "Billing Instruction" tab and a "Limit" sub-tab. The "Window" field is set to 3. The "From Date" is 12/01/2012 and the "To Date" is 21/03/2012. The "Department Codes" field is empty. The "Same Financial Account" checkbox is checked, and the "Cashflag" checkbox is unchecked. The "Name" field is set to "MICROS-Fidelio GmbH". The "Other Name" and "Other Fin. Account" fields are empty. The "Payment" field is empty. The "Contact" field is set to "Aceti, Ralph". The "Address" field is set to "ADR Standard Address", "Neuss, 41460, Europadamm", "Europadamm 2-6", and "41460 Neuss". The "Notes" field is empty. At the bottom, there are three buttons: "Edit Profile", "OK", and "Cancel".

4. Select the **WINDOW** the charges should be routed to.
The default for the new instruction is in sequential order. Window 1 is always reserved for all postings which are not routed to another window. When entering billing instructions for the first time, the default window is 2.
5. Enter the **FROM DATE** and **TO DATE** the billing instruction is valid for, the default dates are the arrival and departure dates.
6. Select the **DEPARTMENT CODES** to be routed from the drop down list of available department codes. The * will select all department codes. Use the **EXCLUDE** button to exclude department codes and the **INCLUDE** button to add department codes.
7. Select any or all of the following options:

-
- SAME FINANCIAL ACCOUNT - if checked, the charge will be routed to the same financial account; if unchecked the charge can be routed to another name or financial account.
 - CASHFLAG - if checked, the financial account will be paid after the event in cash and the name and address fields on the billing instructions are then not accessible.
8. Select the NAME for the billing window from the list of linked profiles. If the booking is made for a company and a contact then the linked company will be selected by default. If the booking is made for a contact only then the contact name will be selected by default.
 9. In the OTHER NAME option you can select to route the department codes to another profile.

If either the profile selected via NAME or OTHER NAME has default billing instructions defined then a message is displayed asking if the default billing instructions should be added.



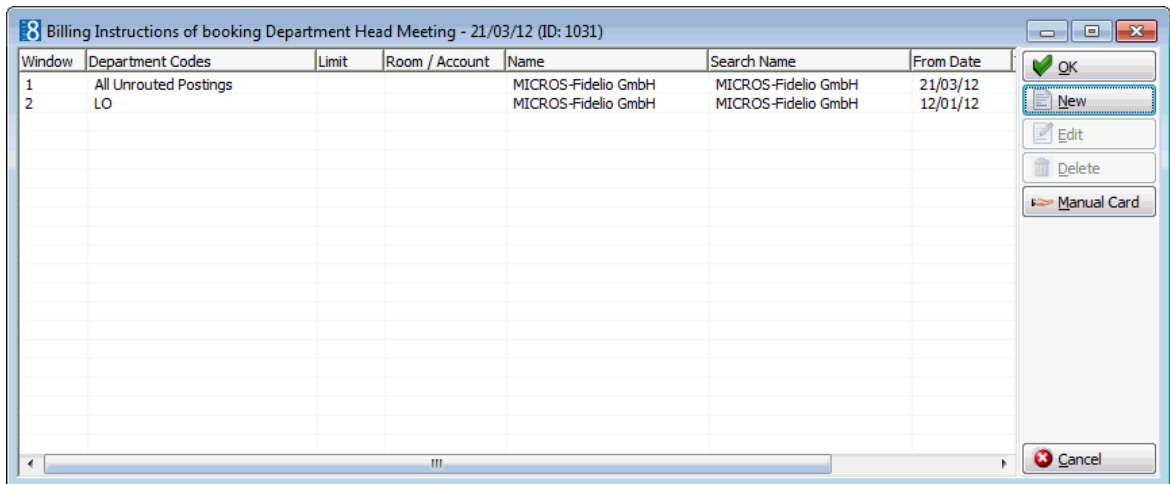
10. Click YES to add the default billing instructions.
11. If the option SAME FINANCIAL ACCOUNT is not selected then the charges can be routed to another financial account OTHER FIN. ACCOUNT. Select from a list of available financial accounts or create a new Financial Account.
12. If the method of PAYMENT is known, it can be selected from a list of available payment methods and will be default for that window at check out.
13. Select the CONTACT from the list of linked profiles. If the booking is made for a company and a contact then the linked contact will be selected by default but can be changed as required. If the booking is made for a contact only then the contact name will be empty.
14. The billing address of the name, other name or account is displayed automatically. If no billing address exists then the primary address is displayed. If more than one address exists for the profile then the required address can be selected.
15. Additional information may be added in the NOTES box if required.
16. The attached profile may be edited by pressing the EDIT PROFILE button.
17. To apply a limit to the billing instruction click the LIMIT tab.

Code	Description	Limit
LO	Accomodation	<input type="text"/>

18. Enter the LIMIT for the selected billing instruction code.
19. Click OK to save the billing instructions.

How to set a billing instruction limit


1. Display the Billing Instructions dialog box.




2. Select the billing instruction to which a limit is to be applied and click the LIMIT tab.



3. Enter the LIMIT for the selected billing instruction.
4. Click OK to save the billing instructions.
5. Click OK to close the billing instructions screen.

 Billing Instruction functionality is controlled by the user right BILLING INSTRUCTIONS under Setup → Configuration → Users → User Definition → Rights → Routing Instructions.

 The start date of the billing instructions defaults to the system date if the parameter DEFAULT START DATE OF BILLING INSTRUCTIONS TO SYSTEM DATE is activated under Setup → Configuration → Global Settings → Billing → Billing 1 tab. This defines if the billing instructions are independent of the booking dates and allows billing instructions to be applied to postings made on pre-arrival bookings. If not activated then the start date of the billing instructions will default to the start date of the booking.

Note: When a financial account is linked and a billing instruction has been entered then it is linked automatically to the financial account. However, if a billing instruction was entered before the financial account was created or linked to the booking then the billing instruction is not linked automatically to the financial account.

Event Manual Postings

See [Manual Postings](#) (See page 132)

Financial Accounts

See [Financial Accounts](#) (See page 137)

Guest Comments

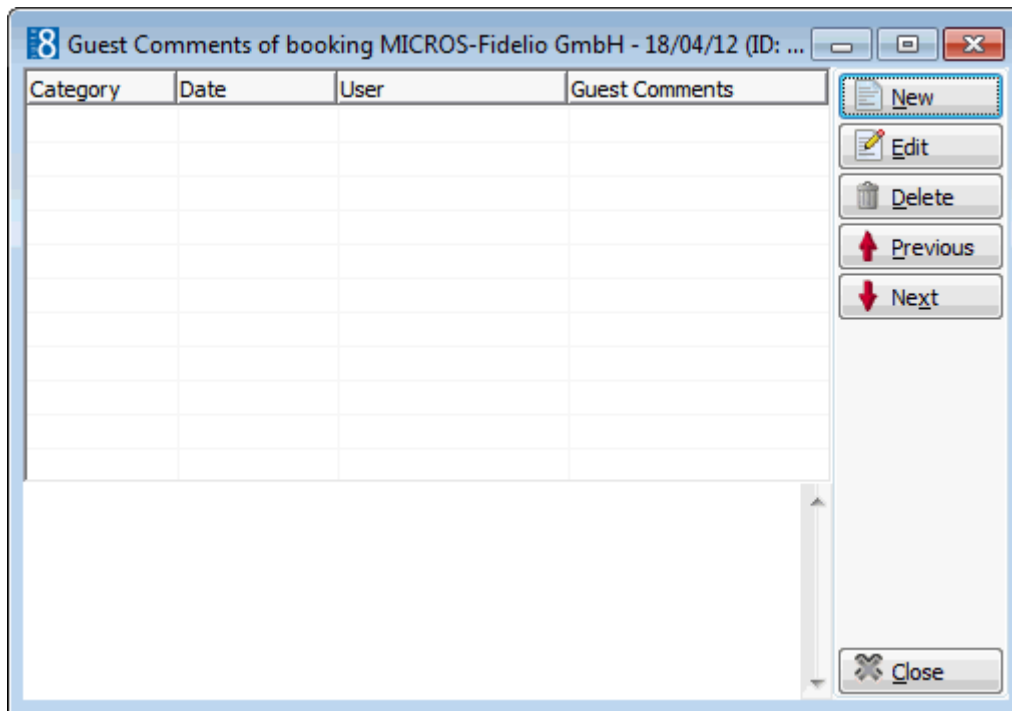
This option may be used to enter guest comments for the duration of the event and is accessible via the OPTIONS menu of Conference Booking screen.

There is no limit as to the number of guest comments that can be entered, the guest comments are displayed in descending date order and the PREVIOUS and NEXT buttons can be used to easily move between the different comments. Indicators on the guest comment grid category grid differentiate between profile, reservation and meeting planner comments. Guest comments are also viewable from room history.

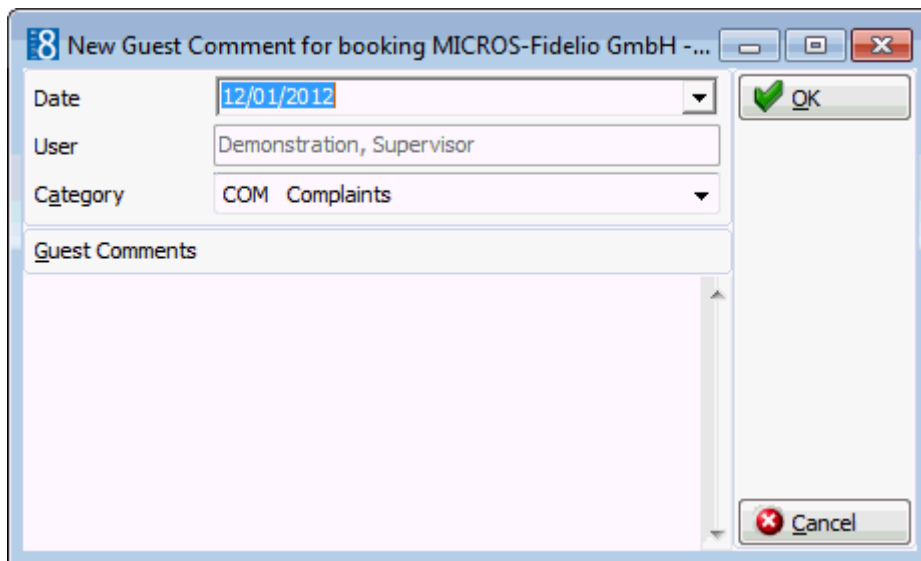
How to enter a new guest comment

1. Click the MEETING PLANNER menu and select CONFERENCE BOOKING to display the Conference Booking screen.
2. Search for and select a Booking Master from the grid.
3. Click the OPTIONS button and select GUEST COMMENTS.

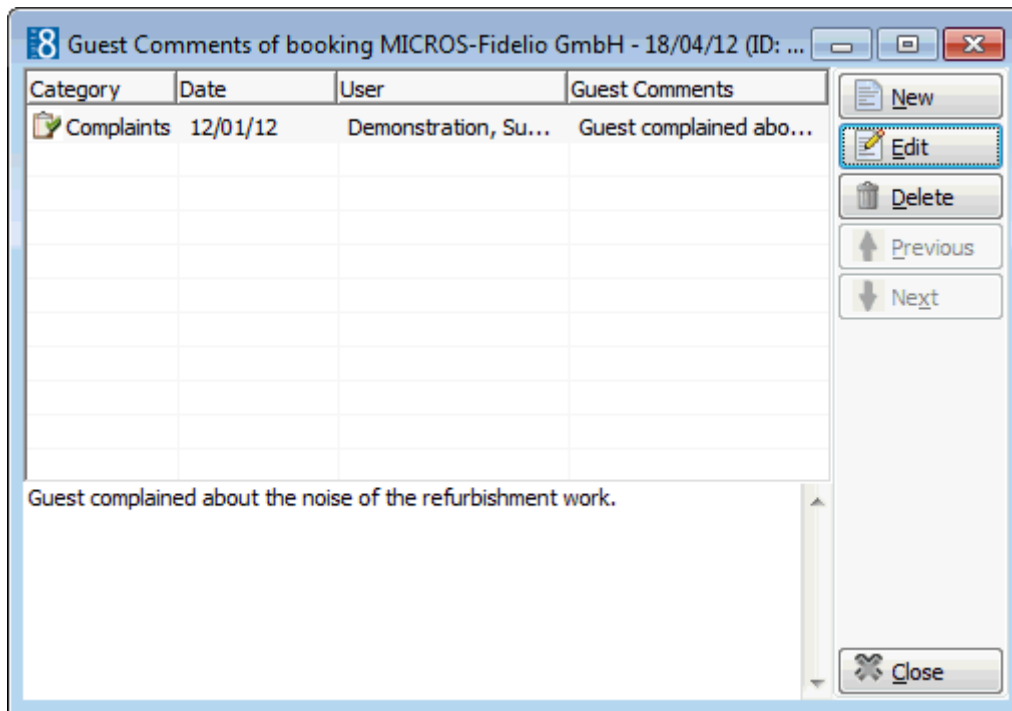
The Guest Comments dialog box is displayed.



4. Click the NEW button to display the Guest Comments dialog box.



5. The DATE defaults to today's date, but may be changed if required.
6. The USER defaults to the signed on user.
7. In the CATEGORY box select the category to which this type of comment belongs.
8. In the GUEST COMMENTS box enter the guest comment.
9. Click OK, the new comment is displayed on the Guest Comments list.



10. Click CLOSE to close the Guest Comments screen.

How to edit a guest comment

1. Search for and select the required booking master, then select GUEST COMMENTS from the OPTIONS menu of the conference booking screen.

The Guest Comments screen is displayed.

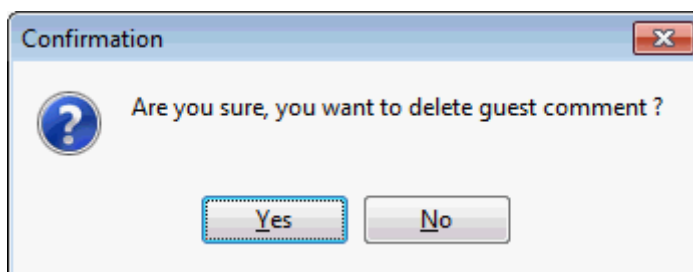
2. Select the guest comment to be edited and click the EDIT button to display the Guest Comments dialog box.
3. Make any changes necessary.
4. Click OK to save the changes.

How to delete a guest comment


1. Search for and select the required booking master, then select GUEST COMMENTS from the OPTIONS menu of the conference booking screen.

The Guest Comments screen is displayed.

2. Select the guest comment to be deleted and click the DELETE button, a confirmation message is displayed.



3. Click YES to delete the guest comment.

 Guest Comments categories are defined via the option GUEST COMMENTS under Setup → Configuration → CRM.

Linked Documents

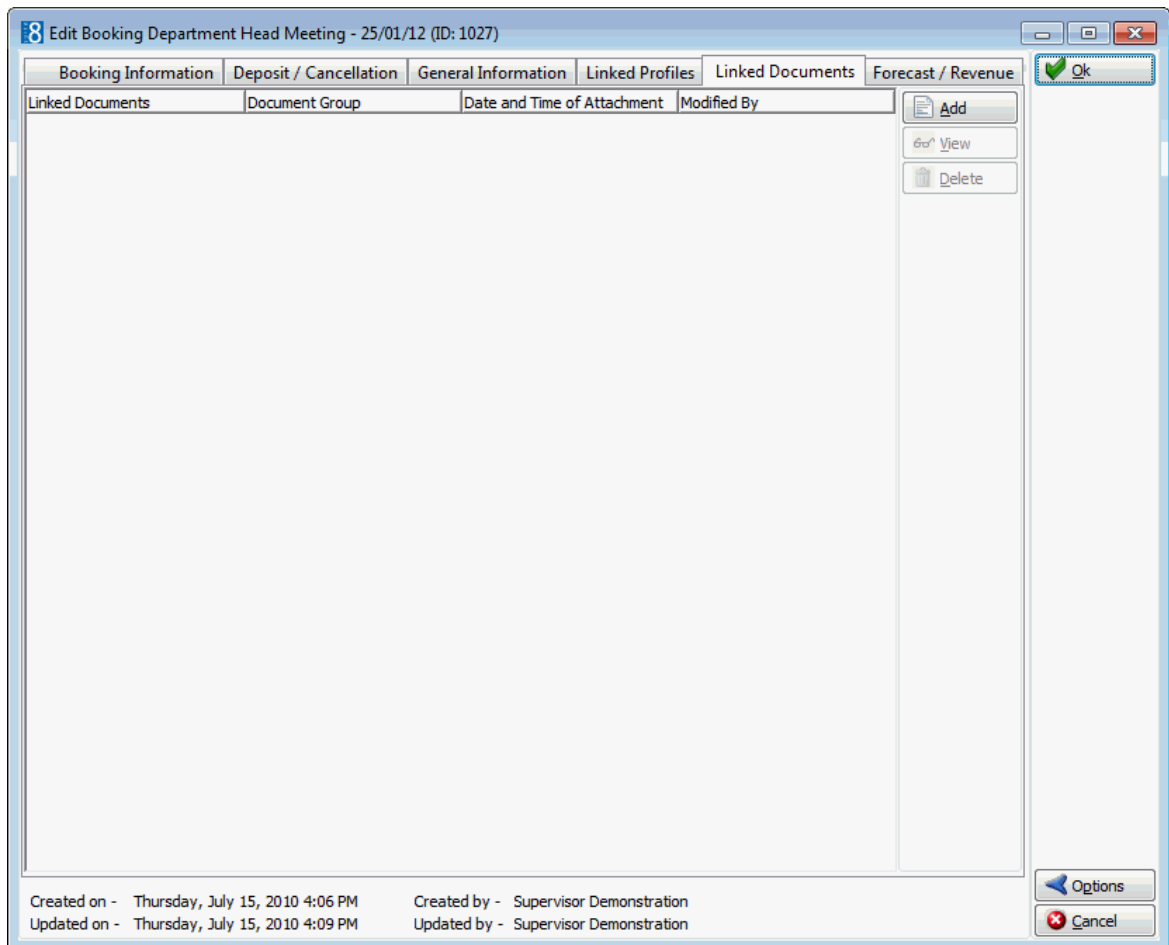
This option enables the user to view, edit or add different types of documents to a booking master. It is recommended to place these documents on a shared network path to which all users have access. If a scanner is connected to the workstation you can also scan and attach documents such as contracts, letters or pictures. The scanner needs to be 'Twain' compatible.

Document groups and path are defined under Setup → Configuration → Miscellaneous → Document Types.

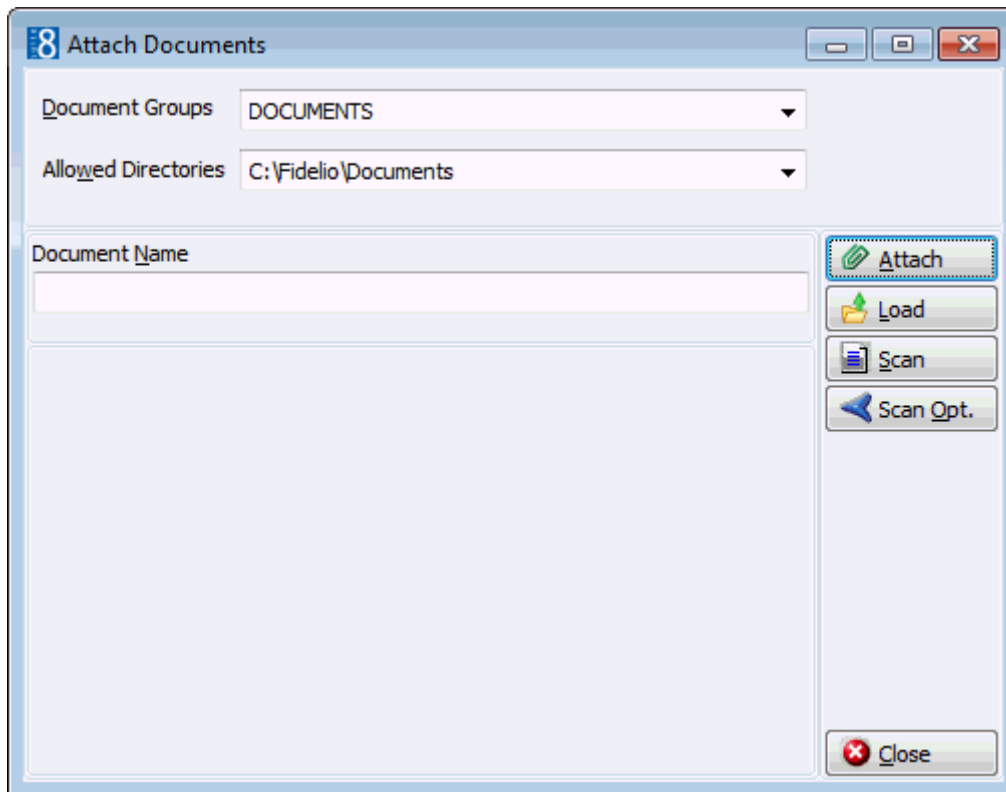
Note: Linked documents can be viewed, edited or added via the linked documents tab on the booking master edit screen or via the options button on the conference booking grid.

How to link a document

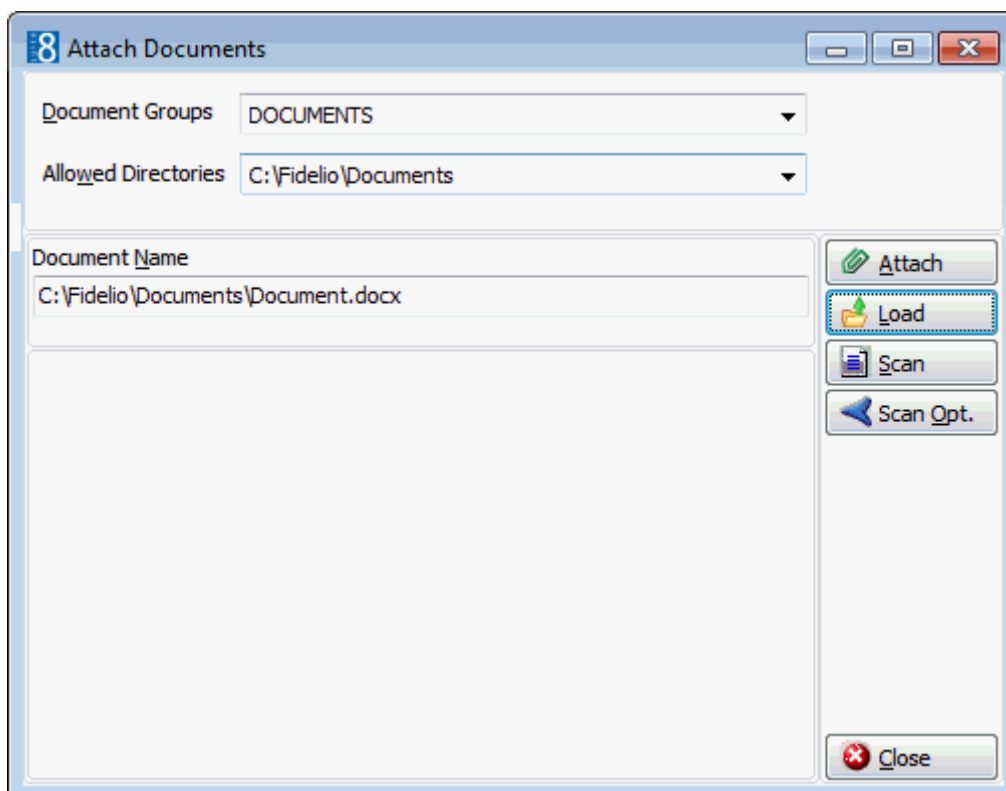
1. Select the LINKED DOCUMENTS tab.



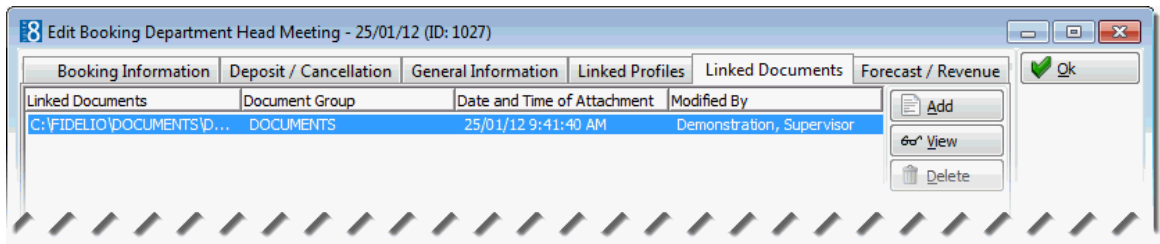
2. Click ADD, the Attach documents dialog box is displayed.



3. In the DOCUMENT GROUPS list, click the document group you want.
4. In the ALLOWED DIRECTORIES list, click the allowed directory you want.
5. Click BROWSE to display the list of documents.
6. Select the required document and click OPEN, the Document Name field is filled.



7. To attach the document, click ATTACH, the document is shown as linked on the linked documents tab.



Note: Pictures or images may be attached in JPG or BMP format. The default setting is JPG, but this may be changed via the SCAN OPT. button. The selected settings will be saved for that user.

How to view/edit a linked document

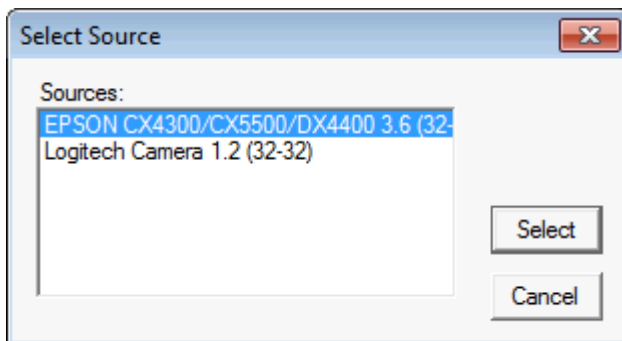
1. Select the LINKED DOCUMENTS tab.
2. Select the document and click VIEW.

Suite8 opens the relevant application, for example, Word if the document is a Word document or Crystal Reports if the document is a Crystal Report.

Note: The document may be edited directly from within the opened application.

How to scan and link a document

1. Select the LINKED DOCUMENTS tab.
2. CLICK ADD, the attach documents dialog box is displayed.
3. In the DOCUMENT GROUPS list, click the document group you want.
4. In the ALLOWED DIRECTORIES list, click the allowed directory you want.
5. Click SCAN, the select source dialog box is displayed.



6. Select the source and click SELECT to open the scanner application.
7. Scan the document.
8. Click ATTACH to link the scanned document.

Note: The scanner needs to be 'Twain' compatible.

Notes

See Notes (See page 119)

User Log

See User Log (See page 135)

Participant List

This option is used to list the participants attending a booking.

How to enter a participant list

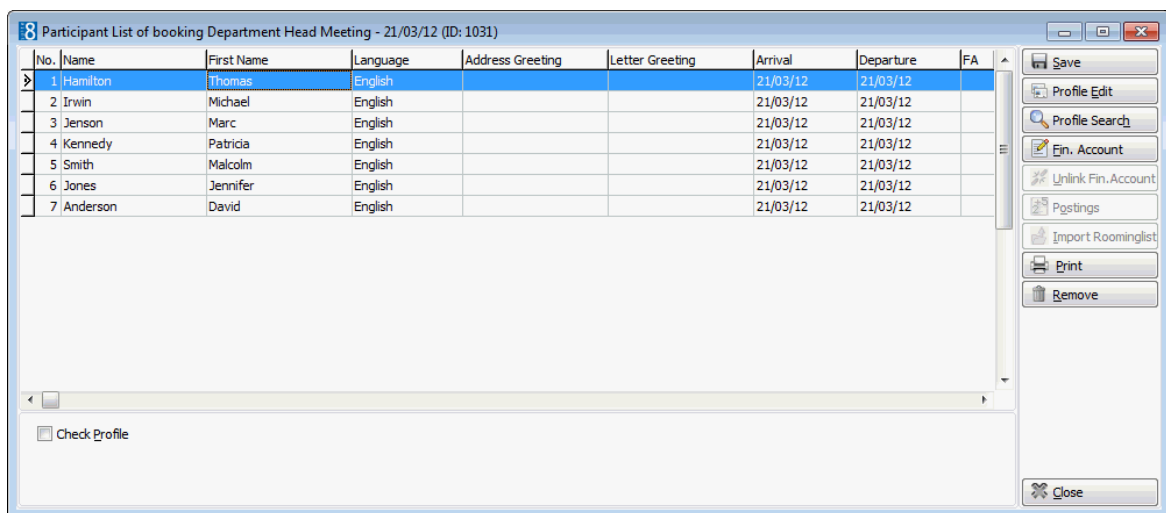
1. From the Conference Booking screen click OPTIONS and select PARTICIPANT LIST from the short-cut menu.

or

From the Conference Diary select the event, right-click to display the short cut menu, select BOOKING OPTIONS and then select PARTICIPANTS LIST.

2. Enter the participants name in the NAME box, if the CHECK PROFILE check box is selected (default) then the system checks if the profile already exists. The profile search dialog box is displayed and the profile may be selected or a new profile created if it does not exist.
3. When all the participants names have been entered click SAVE.

The participants list is updated and the financial accounts created if the functionality to create financial accounts automatically is activated.




Available options

- SAVE - saves the participants list, but also updates any profile information that was changed or creates new profiles if necessary.
- PROFILE EDIT - used to edit the selected profile.
- PROFILE SEARCH - opens the profile search dialog box, entered profiles can be changed by selecting the profile search button and selecting a different profile but only if no financial account for the already entered profile exists.
- FIN ACCOUNT - if the system is configured to create the financial accounts automatically the participants list must be saved first, then selecting the option FIN ACCOUNT opens the NEW FINANCIAL ACCOUNT dialog box with all the details completed for the selected profile. If the financial accounts are to be created manually then selecting the option FIN ACCOUNT opens the FINANCIAL ACCOUNT SEARCH dialog box opens, from which an existing financial account may be selected or a new account created for the selected profile.
- CHECK PROFILE - If selected and users enter a new profile, the profile search screen opens and the profile can be selected if it exists. If this option is not activated and users enter a new profile, the entered profile gets created regardless of whether it exists or not.
- UNLINK - this option is available only via Conference Booking where it can be used to unlink the financial account from the profile.

-
- **POSTINGS** - this option allows users to directly access the participant's financial account in the cashiering module. After entering a valid cashier number and password, the financial account of the participant is displayed. The user can then carry out all cashiering transactions for which they have user rights.
 - **IMPORT ROOMINGLIST** - this option is only available if there are reservations linked to the booking. It can be used to import both individual reservations linked to the booking and the rooming list of linked blocks or groups. If a reservation from the rooming list has already been imported to the participant list then it is no longer displayed on the import list. Reservations with the same profile are only displayed once on the rooming import list.
 - **PRINT** - prints a list of all attendees.
 - **REMOVE** - removes profiles from the participants list. However if a financial account has been created for a participant then the participant cannot be removed from the list unless the financial account has been unlinked.

Note: If the PMS license or the sublicense CCM Billing Component is activated it is possible to create a financial account for the participant.

-  Functionality to create financial accounts automatically is controlled by the parameter **CREATE FINANCIAL ACCOUNT FOR PARTICIPANT LIST AUTOMATICALLY** under Setup → Configuration → Global Settings → CCM → Conference 1 tab. If this option has not been activated then financial accounts may be created manually.

Postings

The posting option allows users to directly access the booking master financial account in the cashiering module. After entering a valid cashier number and password, the financial account of the booking is displayed. The user can then carry out all cashiering transactions for which they have user rights.

Show Attached Table Reservations

This option is used to list the table reservations which are attached to an event in a function space that is linked to a restaurant. If there are no table reservations currently attached then the Table Reservation Search dialog box is displayed and a new table reservation can be entered.

How to display attached table reservations

1. From the Conference Booking screen click **OPTIONS** and select **SHOW ATTACHED TABLE RESERVATIONS** from the short-cut menu.

The Table Reservation Search screen is displayed; any existing table reservations attached to the selected booking are listed.

8 Table Reservation Search

Restaurant: WG,RES,BAR,GLF
 Date: 18/04/2012 to 18/04/2012
 Start time from: to
 Include history Not Assigned tables only
 Room #:
 Booking: MICROS-Fidelo GmbH
 Event:
 Last Name:
 First Name:
 Description:
 Status: Definitive
 Table Reservation #:
 Reservation #:
 Booking #: 1033

Date	Start	End	Description	# of adults	Children	Name	Restaurant	Tables	Canceled
18/04/12	12:00	13:00	Roberts, John; MICR...	14			Winter Garden		

Search
 Reset Filter
 New
 New series
 Edit
 Cancel
 Copy
 Print List
 Print Selected
 Seated as Pla...
 Seated Now
 Show Assignment
 Close

2. Several search criteria such as the dates, the booking name and the booking # are completed with details from the booking.
3. Complete any other required search criteria by typing information or selecting information from the available lists.

For an explanation of the search criteria, see the Table Reservation Search Criteria table below.

4. Click SEARCH to list the table reservations according to the entered search criteria.
5. Click CLOSE to close the table reservation search screen.

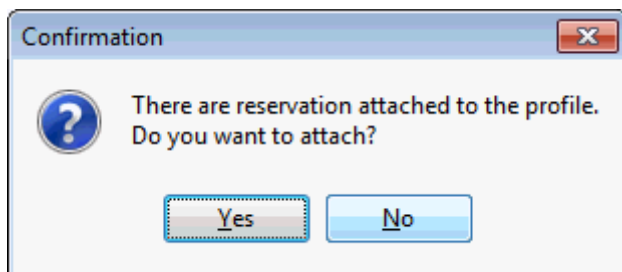
How to enter a new table reservation

1. From the Conference Booking screen click OPTIONS and select SHOW ATTACHED TABLE RESERVATIONS from the short-cut menu.

The Table Reservation Search screen is displayed; any existing table reservations attached to the selected booking are listed.

2. Click NEW; the Table Reservation Edit screen is displayed.

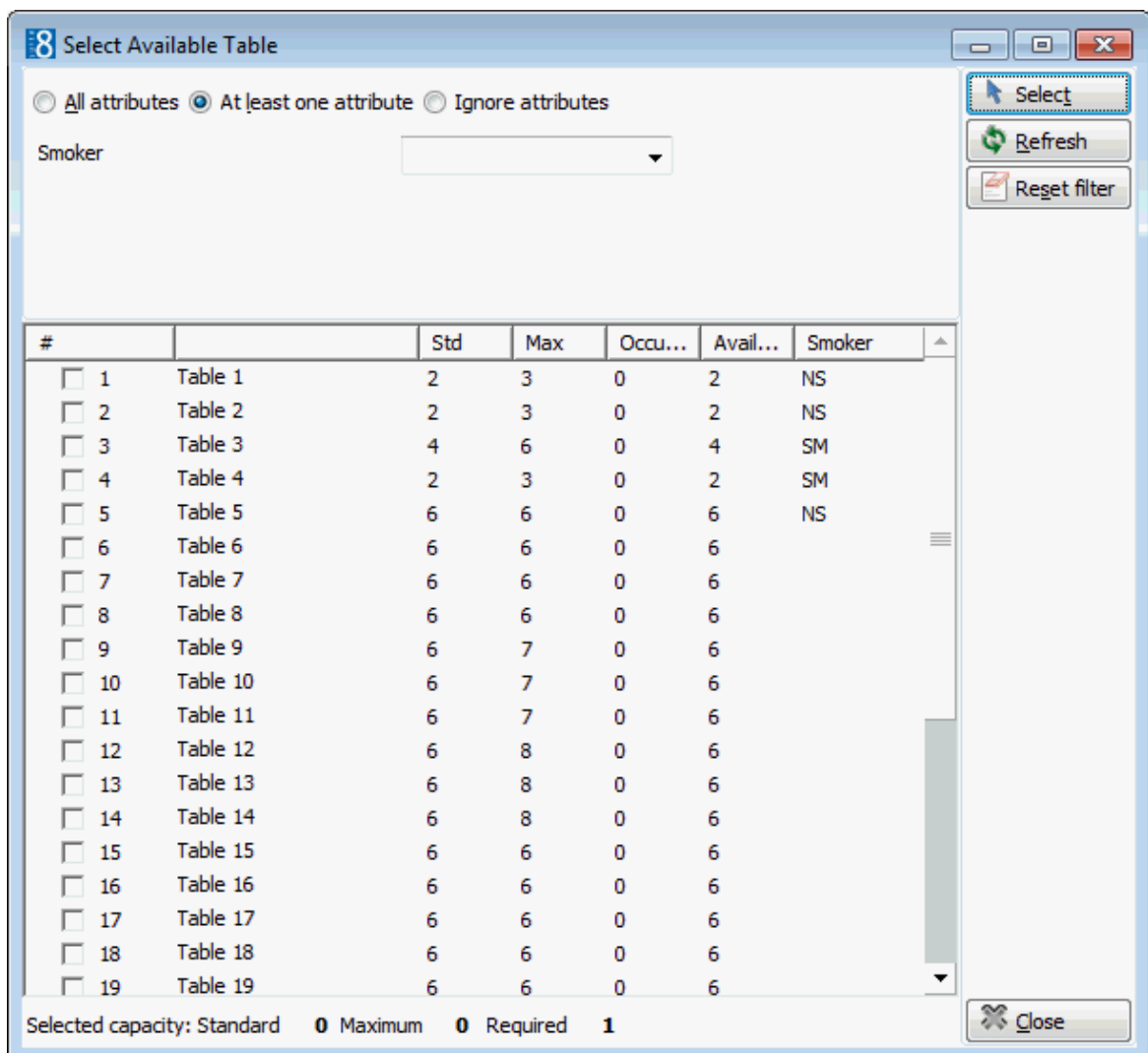
3. The COMPANY and CONTACT profile names from the booking are automatically linked in the PROFILES panel.
4. If the selected profile has a reservation then a message is displayed asking if the reservation should be attached.



5. Click YES to attach the reservation to the table reservation.

If YES was selected then the reservation is now marked as selected in the RESERVATIONS panel.

6. The DATE defaults to the booking arrival date; enter the date for which the table reservation is to be made or select a date from the calendar.
7. Select the RESTAURANT required from the list.
8. In the TEMPLATE box the first available reservation booking time is selected by default. Click the down arrow to select the required reservation booking time.
9. The TIME FROM and TO are completed with the times from the reservation booking template, but may be adjusted as required.
10. If the reservation is being made using a guest profile the # OF ADULTS defaults to NO. OF ATTENDEES as defined in the booking, minus the number for which a table reservation already exists; if the reservation is being made using a reservation then the # OF ADULTS, BABY, CHILD and TEENAGER are taken from the reservation, but maybe changed if required.
11. In the TABLES box, click on the down arrow to open the Select Available Table dialog box.



Multiple tables can be selected if required and tables can be displayed according to attribute type such as smoking or non-smoking.


The standard and maximum number of available seats is displayed for the selected table or tables.

A table number must be selected if the parameter TABLE NUMBER IS MANDATORY is active.

12. Select the required table and then click SELECT.
13. Select the COLOUR in which the table reservation should be displayed in the Table Reservation Availability grid.
14. Enter any additional information in the DESCRIPTION box.
15. Enter information in the TABLE CARD box.
16. Click OK to save the table reservation.

Table Reservation Search Criteria

Fill in this field	With this information
Restaurant	Select a restaurant from the list.
Date to	The dates are completed automatically with the booking arrival and departure dates.
Start time from to	Enter from and to times to limit the search to a specific time period.
Include history	Select this check box to include historical table reservation bookings.
Not Assigned tables only	Select this check box to display only tables which have not been assigned.
Room #	Enter the room number to limit the search to a specific room number.
Booking	Completed automatically with the booking name.
Event	Select an event from the list; all events within the selected dates are displayed.
Last Name	The last name of the guest.
First Name	The first name of the guest.
Description	Enter the text to search for a table reservation with a specific description. The text can be entered using wildcards (%) in order to search anywhere within the description, e.g. %highchair will return reservations with the text 'Highchair required' and also 'Requires a highchair'.
Status	Select a table reservation status from the list, the status DEFINITE is selected by default.
Reservation #	Enter the reservation number to limit the search to a specific reservation.
Booking #	Completed automatically with the booking number.

 Restaurants are linked to a function space via the option RESTAURANTS under Setup → Configuration → Table Reservations.

4 Event Management

Event Management Search

How to access the event management search screen

1. On the MEETING PLANNER menu, click EVENT MANAGEMENT.

The Event Management search screen is displayed.

The screenshot shows the 'Event Management' search interface. It features several search filters on the left, including 'Event Start Date', 'Event Start Time', 'Event Status', 'Function Space', 'Company Name', and 'Contact Name'. An 'Actual Query' window on the right displays the search criteria: 'Start Date between 09/02/2012 and 29/02/2012'. The main area contains a table of search results with columns for Start Date, Start Time, End Time, Status, Event Name, Pax, Function Space, Seating, Booking Name, Company Name, and Contact Name. The results are grouped by date, with 09/02/12, 15/02/12, and 17/02/12 highlighted in yellow. A detailed view of a selected event is shown at the bottom, listing details such as Event Name (Meeting), Start Date/Time (09/02/12 8:00 AM), End Date/Time (09/02/12 5:30 PM), Event Status (Cancellation), No. of Attendees (25), and Booked Function Spaces (Room II).

Start Date	Start Time	End Time	Status	Event Name	Pax	Function Space	Seating	Booking Name	Company Name	Contact Name
09/02/12	8:00 AM	5:30 PM	CAN	Meeting	25	Room II	Classroom Style	Price Waterhouse Pr...	Price Waterhouse	Lincoln Malcolm
09/02/12	10:00 AM	10:30 AM	CAN	Coffee break in the ...	25	Foyer < S >		Price Waterhouse Pr...	Price Waterhouse	Lincoln Malcolm
09/02/12	12:00 PM	2:00 PM	CAN	Lunch	25	Restaurant < S >		Price Waterhouse Pr...	Price Waterhouse	Lincoln Malcolm
09/02/12	3:30 PM	4:00 PM	CAN	Coffee break in the a...	25	Foyer < S >		Price Waterhouse Pr...	Price Waterhouse	Lincoln Malcolm
15/02/12	9:00 AM	6:00 PM	DEF	Meeting	10	Ballroom I + II	Classroom Style	ART Consults	MICROS-Fidello Gmb...	Toast Thomas
15/02/12	10:00 AM	10:30 AM	DEF	Coffee break in the ...	10			ART Consults	MICROS-Fidello Gmb...	Toast Thomas
15/02/12	12:00 PM	2:00 PM	DEF	Lunch	10			ART Consults	MICROS-Fidello Gmb...	Toast Thomas
15/02/12	3:30 PM	4:00 PM	DEF	Coffee break in the a...	10			ART Consults	MICROS-Fidello Gmb...	Toast Thomas
15/02/12	7:00 PM	9:00 PM	DEF	Dinner	10			ART Consults	MICROS-Fidello Gmb...	Toast Thomas
17/02/12	7:00 PM	11:00 PM	TEN	Dinner Dance	12	CS101		Kate Melua	Siemens	
17/02/12	7:00 PM	11:00 PM	DEF	Dinner Dance	12	CS100		Kate Melua	MICROS-Fidello Gmb...	

The event management search screen is divided into four distinct areas:

- Query - consists of multiple basic event search criteria, such as Event Start Date, Event Status, Event Type, Company Name, Contact Name and an advanced query option.
- Query Results - the results of the query shown in a grid format, including Start Date, Start Time, End Time, Status, Event Name, Number of persons (Pax), Function Space, Seating, Booking Name, Company Name, Contact Name, Contact on Site and ID. In order to easily see the events which belong to a specific day; events are grouped by day and the days are coloured alternately yellow and white.
- Tree View - a tree listing of all the details associated with this event.
- HTML page - free definable HTML display which by default has a list format or a 'big' format where the details are displayed in a non-grid style format.

Entering a event management query

The query screen is split into two sections:

- The basic search criteria
- The advanced query options

The basic search criteria

You may fill in multiple fields to narrow the search criteria. The actual query is displayed in a script format in a window on the right hand side of the screen. If no data is entered, the list of events displayed is in alphabetical order. The options are explained in the Event Management Search dialog box.

Fill in this Field	With this information
Event Start Date	Search for conferences based on the event start date. By default, all events for today's date will be shown. Select a date from the calendar list box
To	To enter a date range, select a date from the calendar list box until which the event start date should be searched
Event Start Time	Search for conferences based on the event start time
To	To enter a time range the To time can be entered or selected from list box
Event Status	Select the conference statuses from the drop down list. If no status is entered, conferences with all booking statuses will be shown
Event Type	Search for bookings by event type. Select from list box the available event types
Function Space	Search for bookings by Function Space. Select from list box the available Function Spaces
Company Name	Click on the three dots next to the company name, if you would like to search for existing company profiles
Contact Name	Click on the three dots next to the contact name, if you would like to search for existing contact profiles
incl. Participants	If a name is entered in the Contact Name search box then selecting this check-box will search for all bookings where this contact has been entered as a booking contact as well as a participant.
Participants only	If a name is entered in the Contact Name search box then selecting this check-box will search for all bookings where this contact has been entered as a participant.

The advanced query options

The advanced query consists of three selection fields:

- The first allows you to select from a drop-down list of query possibilities.
- The second limits the query to a second level or gives a choice of conditions.
- The third field requires either a free-format value or for the user to select a possible value from a drop-down list.

The fields are explained in the Advanced Query dialog box.

Field	Definition
Event Id	Search by Event Id. The following options are available while searching on event ID: Is equal to Is not equal to Is less than Is greater than

Note: The actual query is displayed in script format in a window on the right hand side of the screen and as long as the filter is not cleared by pressing the **Clear** button, each additional query will be added to the actual query list.

Wildcards

The search criteria can also be entered using wildcards (%). This is helpful in the company and contact name fields. For example, M%ller will return Miller, Muller, %Bank will return Investment Bank, American Bank and Fidelio% will return Fidelio Gmbh or Fidelio Inc.

Activating the search

To activate the search the user must click the SEARCH button. Clicking the SEARCH button will return the maximum number of events defined in the configuration, with the question to display more if there are more to be displayed.

A list of events that match the specified criteria is displayed. The query criteria can be easily reset by clicking the CLEAR button.



A full explanation of the event management screen search behaviour can be found in the Suite8 Configuration Manual under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.



The maximum number of lines displayed is controlled by the parameter MAXIMUM LINES IN LIST under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.

Event Management Options

From the Event Management screen the following options are available:

- New (See page 54) - to open the Booking Master Search screen and create a new booking master or edit an existing booking master.
- Edit (See page 200) - to select an event and open the edit event screen.
- Resources (See page 146) - to open the Event Detail Screen and access resources.
- Booking Master (See page 69) - to select a booking and open the Edit Booking Master Screen.
- Sub Event (See page 195) - to open the new event screen in order to add a sub-event.



The option SUB EVENT is controlled by the parameter USE MASTER-SUB EVENTS under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

Sub Events via Event Management

The sub event option allows users to create events as sub-events into the same function space as the master event without double booking.

Special features of the master and sub event relationship

- A sub event must be in the same function space as the master event, but can have a different seating arrangement or rate.
- The start and end time of a sub-event, also taking into consideration any setup and set down time must overlap with the start and end time of the master event. For example: A conference from 09:00-18:00 will be created as the master event and morning coffee from 08:30-09:00 could be created as a sub event.
- The Block box in the event edit screen will always be updated with the earliest time of either the sub or master event and with the latest time of either the sub or master event. This option always indicates the start and end times the function space is blocked.
- In the event grid **M** indicates a master event and **S** indicates the sub events. In addition master/sub-events are displayed in a tree format and can be expanded and collapsed.
- Easy conversion from a master event to a sub-event by vice versa.
- Changing the number of attendees in the master event will prompt the user to change the number of attendees in the sub events. The user will be given the option to change all sub events or only the ones with the same number of attendees.

How to create a sub event

1. Click the MEETING PLANNER menu and select EVENT MANAGEMENT to display the Event Management screen.
2. Search for and select an Event from the grid.
3. Click SUB EVENT or right-click and select ADD SUB EVENT from the short-cut menu. The New Event screen is displayed with a comment indicating that this is a Sub Event of 'Event Name'.

8 New Sub Event for event Meeting - 30/01/12 9:00 AM (Booking ID: 1242)

Event

Company Name: MICROS-FIDELIO GmbH
 Contact Name: Fancourt, Martin
 Contact on site:
 Booking Name: MF Germany Suite 8 Conference

Event Information **Sub Event of Meeting (1482)**

Event Status: TEN/Tentative
 Event Type:
 Event Name:
 No. of Attendees: 50 Min. Guarantee:
 Start Date: 30/01/2012 End Date: 30/01/2012
 Start Time: End Time:
 Alternative

Info Board:
 Info Board Profile:
 Incl. in Package
 Noisy

Function Space Information

Function Space: Ballroom I
 Seating Arr.:
 Rate: Amount: Setup Time:
 Dept. Code: 330 Banquet Room Re Special Rate: Don't Move: Incl. in Package:
 Rebate: % Flat: Orig. Amount: Cost Price:
 Alternative

Expected / Forecast Information

Department Code	Curr	Expected Per Pers.	Expected Flat Rate	Expected Total	Forecast	Net	Tax

OK
Table Res
Cancel

- Complete the options as detailed in the table below:
- Click OK to save the sub event.

A master event is indicated by **+M** in the first column. Clicking the plus sign lists all the sub events which are then indicated by **S** in the first column.

The BLOCK option on the Master Event will be updated where applicable.

Event dialog box

Field Name	Explanation
Event Information	
Event Status (Required)	The event status field will be filled automatically with the status entered under conference status on the booking master. It can be changed if required by selecting the status for this particular event from the drop down list.

Event Type (Required)	Select the event type from the drop down list. When selecting the event type the event name will be filled in automatically with the definition entered under Setup → Configuration → Conference Management → Event Type. It can be changed if required. If the event types have been defined with default forecast figures under Setup → Configuration → Conference Management → Event Defaults, the forecast/revenue information at the bottom of the event edit screen will be filled as well.
Event Name (Required)	The name of the event will be filled automatically after the event type has been selected. It can be changed at any time.
No of Attendees (Required)	The number of attendees for the event. The number of attendees entered will be taken for several checks, for example function space and seating arrangement check.
Min Guarantee	Enter the minimum number of guaranteed persons. This number is normally taken for billing even if less should turn up for the function.
Start Date	The start date is filled automatically with the system date if it is within the range of the arrival and departure date. Future bookings will default to the arrival date of the booking master. It is not possible to create an event that is not within the arrival and departure date of the booking.
End Date	The end date is filled automatically with the end date of the booking master. It is not possible to create an event that is not within the arrival and departure date of the booking.
Start Time	If the event type has been configured with default start time, then it is filled in automatically, but can be changed by entering a time or selecting one from list box. If the event was booked through the conference diary then the start time is taken from the diary.
End Time	If the event type has been configured with default end time, then it is filled in automatically, but can be changed by entering a time or selecting one from list box. If the event was booked through the conference diary then the end time is taken from the diary. Note: If an event finished past midnight, the end date has to be changed to the next day.
Info Board	Enter the information that should be placed on the info board outside the function space such as "Fidelio Software – Dealer Conference".
Info Board Profile	Mainly used in conjunction with the doorcard interface, this option allows the property to enter a different name. For example, the booking was made by Star Conferences for the company IBM; so on the doorcard IBM should be displayed.

	The handling is such that when a company and a contact are entered the entry in the field Info Board Profile replaces the company, if only a contact is entered the entry in the Info Board Profile replaces the contact. If no entry is made in the Info Board Profile then the company/contact name from the booking will be displayed.
Incl. in Package	Check this box to define if the event is included in a conference package. The field is only accessible if a conference package has been booked for this day.
Noisy	Select this box to indicate that the event will be a 'noisy' one such as a dinner party with live music playing. If the noisy flag has been set, users can also see the indication in the conference diary.
Block	This is a view only field and shows the start time and the end time the function space is blocked for. This is setup time plus event start time and event end time plus set down time. This is completed automatically if a room block with a block code is attached.
Function Space Information	
Function Space (Required)	Select the function space from the drop-down list of defined function spaces. If a shareable function space is linked to the event type selected, this will be displayed automatically, but may be changed as required.
Seating Arrangement	Select the seating arrangement from the drop-down list. In some cases the seating arrangement might already be filled in, i.e. if the parameter flag: MULTIPLE FUNCTION SPACES PER EVENT has been activated under Setup → Configuration → Global Settings → Conference tab.
Rate	Select the rate from list box of defined rates, such as full day or half day. The rate codes are defined under Setup → Configuration → Conference Management → Function Spaces → Rate Codes. In some cases the rate might already be filled in, i.e. if the parameter MULTIPLE FUNCTION SPACES PER EVENT has been activated under Setup → Configuration → Global Settings → Conference tab.
Amount	The amount is filled with the rate entered under Setup → Configuration → Conference Management → Function Space Definition → Rates tab. It is also possible to change this amount with a special rate. The special rate field will be checked if this is the case.
Dept Code (Required)	The department code. In order to use the posting functionality, every resource item has to have a department code assigned. This can be done via the configuration part. The field is filled automatically with the department code entered on the function space definition.
Special rate	If a different rate has been entered in the amount field, this field will indicate the change with a tick mark.

Setup Time	If the seating arrangements have been defined with default setup time, the default values will be filled in automatically, but can be changed at any time.
Set down Time	If the seating arrangements have been defined with default set down time, the default values will be filled in automatically, but can be changed at any time. Please note that the function space will be booked from the event start until the event end time including the defined setup and set down time.
Don't Move	This field should be marked if a customer insists on a particular function space. If this field is selected users will also see the indicator in the conference diary.
Incl. in Package	The field is only accessible if a conference package has been booked for this day.

How to convert a sub event to a master event

1. Click the MEETING PLANNER menu and select EVENT MANAGEMENT to display the Event Management screen.
2. Select the sub event and right-click to display the short-cut menu.
3. Click CONVERT TO MASTER EVENT, a message is displayed informing you that the previously selected function space is not available.
4. Select either the NEW FUNCTION SPACE or the WAITLIST button.
5. Complete the New Function Space dialog box.
6. Click OK, you are asked if you want to add default miscellaneous items.
7. Select YES to add the default miscellaneous items.

The event is converted and displayed in the grid as a master event.

How to convert a master event to a sub event

1. Click the MEETING PLANNER menu and select EVENT MANAGEMENT to display the Event Management screen.
2. Select the master event and right-click to display the short-cut menu.
3. Click CONVERT TO SUB EVENT, the Event list of possible master events is displayed.
4. Select the required master event and click OK.

The event is converted and displayed in the grid as a sub-event. Any default items are automatically removed.

Note: If the master event has existing sub events it can not be converted unless the sub events have been removed or re-linked.

Note: Master/sub event functionality requires that the parameter USE MASTER-SUB EVENTS is active, under Setup → Configuration → Global settings → Conference tab.

Edit Event

An event can be edited and adjustments made, such as changing the start/end time, the number of attendees, the seating arrangement or changes to the info board.

How to edit an event

1. Click the MEETING PLANNER menu and select EVENT MANAGEMENT to display the Event Management screen.
2. Search for and select an Event from the grid.
3. Click EDIT, the Edit Event screen is displayed.

8 Edit Event Lunch - 21/03/12 12:00 PM (Booking ID: 1031)

Event

Company Name: MICROS-Fidelio GmbH
 Contact Name: Aceti, Ralph
 Contact on site: Bestin, Lisa
 Booking Name: Department Head Meeting

Event Information

Event Status: DEF Definitve
 Event Type: LUN Lunch
 Event Name: Lunch
 No. of Attendees: 14 Min. Guarantee:
 Start Date: 21/03/2012 End Date: 21/03/2012
 Start Time: 12:00 PM End Time: 2:00 PM
 Alternative

Info Board:
 Info Board Profile:
 Ind. in Package: Conference Package II
 Noisy
 Block: 21/03/12 12:00 PM - 2:00 PM

Function Space Information

Function Space: Restaurant Shareable
 Seating Arr.:
 Rate: Amount:
 Dept. Code: 400 Minibar Special Rate Don't Move Ind. in Package
 Rebate: % Flat Orig. Amount: Cost Price:
 Alternative

Expected / Forecast Information

Department Code	Curr	Expected Per Pers.	Expected Flat Rate	Expected Total	Forecast	Net	Tax
Banquet Beverage	EUR	5.00		70.00	70.00	58.82	11.18
Banquet Food	EUR	20.00		280.00	280.00	235.29	44.71

Buttons: OK, Table Res., Cancel

4. Make any changes necessary, typical changes would be amending the start/end time, the number of attendees or the seating arrangement.
5. Click OK to save the changes to the event.

Event dialog box

Field Name	Explanation
Event Information	
Event Status (Required)	The event status field will be filled automatically with the status entered under conference status on the booking master. It can be changed if required by selecting the status for this particular event from the drop down list.
Event Type (Required)	Select the event type from the drop down list. When selecting the event type the event name will be filled in automatically with the definition entered under Setup → Configuration → Conference Management → Event Type. It can be changed if required. If the event types have been defined with default forecast figures under Setup → Configuration → Conference Management → Event Defaults, the forecast/revenue information at the bottom of the event edit screen will be filled as well.
Event Name (Required)	The name of the event will be filled automatically after the event type has been selected. It can be changed at any time.
No of Attendees (Required)	The number of attendees for the event. The number of attendees entered will be taken for several checks, for example function space and seating arrangement check.
Min Guarantee	Enter the minimum number of guaranteed persons. This number is normally taken for billing even if less should turn up for the function.
Start Date	The start date is filled automatically with the system date if it is within the range of the arrival and departure date. Future bookings will default to the arrival date of the booking master. It is not possible to create an event that is not within the arrival and departure date of the booking.
End Date	The end date is filled automatically with the end date of the booking master. It is not possible to create an event that is not within the arrival and departure date of the booking.
Start Time	If the event type has been configured with default start time, then it is filled in automatically, but can be changed by entering a time or selecting one from list box.
End Time	If the event type has been configured with default end time, then it is filled in automatically, but can be changed by entering a time or selecting one from list box. Note: If an event finished past midnight, the end date has to be changed to the next day.
Info Board	Enter the information that should be placed on the info board outside the function space such as Fidelio Software Dealer Conference.






Info Board Profile	<p>Mainly used in conjunction with the doorcard interface, this option allows the property to enter a different name. For example, the booking was made by Star Conferences for the company IBM; so on the doorcard IBM should be displayed.</p> <p>The handling is such that when a company and a contact are entered the entry in the field Info Board Profile replaces the company, if only a contact is entered the entry in the Info Board Profile replaces the contact. If no entry is made in the Info Board Profile then the company/contact name from the booking will be displayed.</p>
Incl. in Package	Check this box to define if the event is included in a conference package. The field is only accessible if a conference package has been booked for this day.
Noisy	Select this box to indicate that the event will be a noisy one such as a dinner party with live music playing. If the noisy flag has been set, users can also see the indication in the conference diary.
Block	This is a view only field and shows the start time and the end time the function space is blocked for. This is setup time plus event start time and event end time plus set down time. This is completed automatically if a room block with a block code is attached.
Function Space Information	
Function Space (Required)	Select the function space from the drop-down list of defined function spaces. If a shareable function space is linked to the event type selected, this will be displayed automatically, but may be changed as required.
Seating Arrangement	Select the seating arrangement from the drop-down list. In some cases the seating arrangement might already be filled in, i.e. if the parameter flag: MULTIPLE FUNCTION SPACES PER EVENT has been activated under Setup → Configuration → Global Settings → Conference tab.
Rate	Select the rate from list box of defined rates, such as full day or half day. The rate codes are defined under Setup → Configuration → Conference Management → Function Spaces → Rate Codes. In some cases the rate might already be filled in, i.e. if the parameter MULTIPLE FUNCTION SPACES PER EVENT has been activated under Setup → Configuration → Global Settings → Conference tab.
Amount	The amount is filled with the rate entered under Setup → Configuration → Conference Management → Function Space Definition → Rates tab. It is also possible to change this amount with a special rate. The special rate field will be checked if this is the case.

Dept Code (Required)	The department code. In order to use the posting functionality, every resource item has to have a department code assigned. This can be done via the configuration part. The field is filled automatically with the department code entered on the function space definition.
Special rate	If a different rate has been entered in the amount field, this field will indicate the change with a tick mark.
Setup Time	If the seating arrangements have been defined with default setup time, the default values will be filled in automatically, but can be changed at any time.
Set down Time	If the seating arrangements have been defined with default set down time, the default values will be filled in automatically, but can be changed at any time. Please note that the function space will be booked from the event start until the event end time including the defined setup and set down time.
Dont Move	This field should be marked if a customer insists on a particular function space. If this field is selected users will also see the indicator in the conference diary.
Incl. in Package	The field is only accessible if a conference package has been booked for this day.

5 Maintenance

Maintenance is helpful in recording and tracing repair service requests for rooms, function spaces and public areas. The maintenance tool can be accessed via the option MAINTENANCE on the Rooms Management menu. Users can enter new maintenance tasks and search for and edit existing maintenance tasks. The Maintenance tool allows users to search by locality, maintenance status, the type of maintenance task and the responsible employees.

Maintenance types configured as Out of Order will automatically prompt a confirm message, answering yes will display the out of order dialog box. If a room is assigned to a reservation which has a maintenance record, an indicator on the edit reservation screen shows MAINTENANCE, the maintenance record can be accessed by clicking the maintenance indicator. Short message sending functionality may be used to alert employees about maintenance tasks.

-  The maintenance option is controlled by the parameter HOTEL MAINTENANCE under Setup → Configuration → Global Settings → Generic → Generic 3 tab.
-  Maintenance search functionality is controlled by the user right VIEW under Setup → Configuration → Users → User Definition → Rights → Hotel Maintenance → Maintenance Search.
-  Maintenance edit functionality is controlled by the user rights NEW, EDIT, DELETE and RESOLVE under Setup → Configuration → Users → User Definition → Rights → Hotel Maintenance → Maintenance Edit.
-  SMS Sending functionality is controlled by the parameter ENABLE SMS SENDING under Setup → Configuration → Global Settings → Interfaces → Misc. Interface 4 tab.
-  The parameters for short message sending for maintenance tasks are defined via the section MAINTENANCE SMS NOTIFICATIONS under Setup → Configuration → Global Settings → Generic → Generic 3 tab.

Access maintenance

- Click the Rooms Management menu or the Meeting Planner menu and select Maintenance.
The Maintenance dialog box is displayed; all the Not Resolved maintenance records are listed by default.

Date from To View All Resolved Not Resolved Actual Query

Locality Employee Priority All Low Normal High

Description Status Level

Type

Entered	Resp. Employee	Type Code	Type	Due Date	Resolved	Locality	Description	OOO	Status Level
05/09/11 11:53:54 AM		YEA	Yearly Maintenance	09/09/11 ...		Room	107		
27/07/11 11:19:01 AM	SUPERVISOR, FL...	GSR	Guest Service Request			Room	111		
26/07/11 3:39:06 PM	Trent, Rebecca	SPR	Spring Cleaning	27/07/11 ...		Public Place	Restaurant "Fidello"		In Progress
06/08/11 11:11:21 AM	Supervisor, Demo...	CAR	Carpet Cleaning			Location	In the Bar		
06/08/11 11:10:03 AM	Supervisor, Demo...	LIG	Light Bulb Broken			Public Place	Guest Toilette		
23/07/11		TV	TV broken			Room	107		
30/07/11 10:08:35 AM	Supervisor, Demo...	GSR	Guest Service Request			Room	111		
29/07/11 9:54:16 AM	Supervisor, Demo...	GSR	Guest Service Request			Room	111		
22/08/11 5:35:12 PM	Supervisor, Demo...	GSR	Guest Service Request			Room	111		
21/08/11 12:07:46 PM	Supervisor, Demo...	HSK	Housekeeping Request			Room	420		

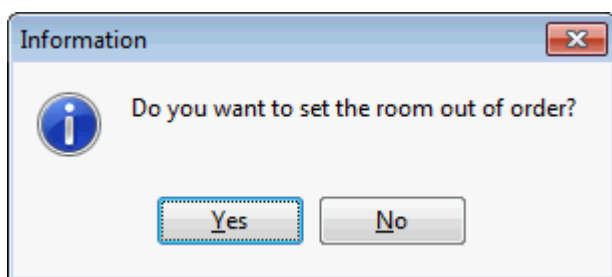
Buttons: New, Edit, Delete, Out of Order, Resolve Now, Print, E-Mail Log, SMS Log, User Log

Note: Maintenance functionality is part of the Fidelio Suite8 Small Business Edition feature list.

Entering a new maintenance task

1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
2. Click NEW to enter a new maintenance task.

3. In the LOCALITY box click the drop-down arrow and select the location of the maintenance task.
4. In the DESCRIPTION box click the drop-down arrow and select the description. The descriptions are dependant on the locality selected.
5. In the TYPE box click the drop-down arrow and select the type of maintenance task. If the number of minutes needed to complete this task have been defined then the DUE DATE and time are automatically completed.
6. In the NOTES box enter a description of the maintenance task, if required.
7. Next to the RESP. EMPLOYEE box click the button to select an employee from the Select Employee screen.
8. Type the due date for the task in the DUE DATE box or click the drop-down arrow and select a date from the calendar. If the number of minutes needed to complete this task have been defined then the DUE DATE and time are automatically completed.
9. In the STATUS LEVEL box select the current status level of this task; the status level can be updated at any time.
10. Click OK to save the maintenance task record.
11. If the maintenance type selected is configured as OUT OF ORDER then a message is displayed asking if the room should be placed out of order.



11. Select YES to place the room out of order.
12. The out of order dialog box is automatically displayed when confirming the out of order message; see setting a room status to OOO or OOS (See page 209) .

Maintenance task dialog box

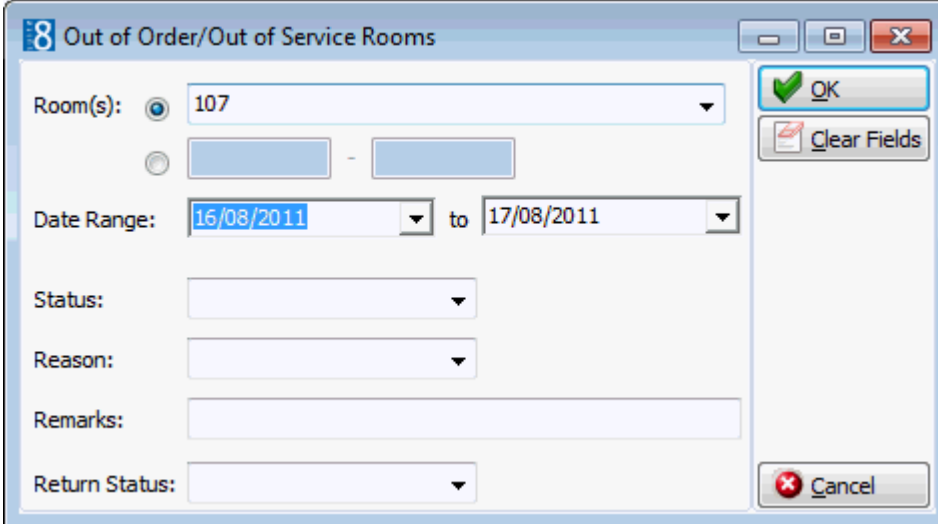
Field	Definition
Locality	Select the location of the maintenance task - Room, Function Space, Location or Public Location.
Description	The description selection is dependant on the locality selected: Rooms - choose a room number from the list of available rooms. Function Space - choose a function space from the list of available function spaces. Location - choose from a list of defined locations. Public Place - a place is not required to be selected.
Type	Defines the maintenance issue, select a type from the list of defined maintenance types.
Notes	Additional description about the defect can be entered in this box.
Resp. Employee	Select the responsible employee from the profile search screen.
Due Date	The date and time the task is due to be completed. This is completed automatically if the number of minutes needed to complete the selected task has been defined in the configuration.
Entered	The date and time the defect was entered.
Date/ Time resolved	The date and time the defect was resolved.

Resolving a maintenance task

1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
2. Select the task to be resolved.
3. Click RESOLVE NOW, the task is now marked as resolved.
4. The STATUS LEVEL is automatically updated with the status level defined as FOR RESOLVE.

Setting a room status to OOO or OOS

1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
2. Select the task to be placed out of order; only maintenance tasks which have been configured as out of order can be selected.
3. Click OUT OF ORDER; the out of order dialog box is displayed with the room number automatically completed.



4. Type the starting date for the out of order block in the DATE RANGE box or click the drop-down arrow and select a date from the calendar.
5. Type the end date in the To box or click the drop-down arrow and select a date from the calendar.
6. In the STATUS box, click on the down arrow to open the drop-down list, and select the room blocking status.
7. In the REASON box, click on the down arrow to open the drop-down list, and select the reason for blocking the room.
8. In the REMARKS box, you can enter relevant comments.
9. In the RETURN STATUS box, select the status to which you want the room to revert when the Out of Order status is removed.
10. Click OK to save the out of order record.

The out of order record can be viewed via the option OUT OF ORDER on the ROOMS MANAGEMENT menu.

Marking a resolved maintenance task as unresolved

1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
2. Select the task to be unresolved.
3. Click CLEAR RESOLVE the task is now marked as not resolved.

Deleting a maintenance task

1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
2. Select the task to be deleted.
3. Click DELETE, the task is deleted.

Print, Email, SMS or Fax a maintenance task

The attendants report lists the room number, room category, status, number of persons in the room, guest name (if still in-house), arrival and departure dates of guest and VIP code. In addition, there is a summary of rooms and credits for each attendant.

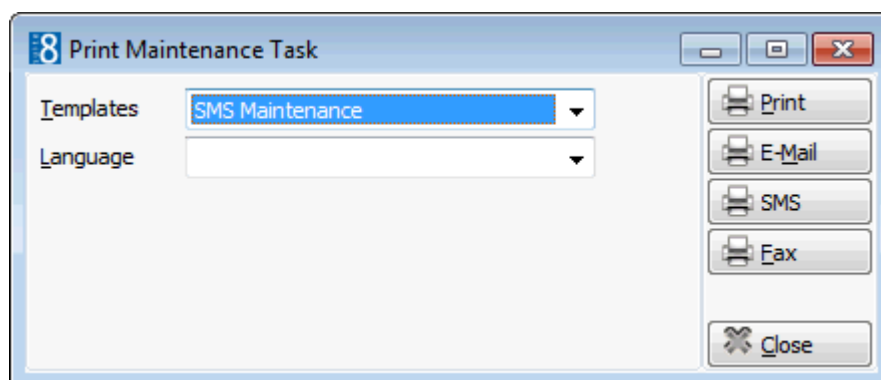
How to print a maintenance task



1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.

The Maintenance dialog box is displayed; all the NOT RESOLVED maintenance records are listed by default.

2. Select the maintenance task to be printed and click the PRINT button.

The Maintenance Task Print dialog box is displayed.



3. In the TEMPLATES box click the drop-down arrow and select the template to be used.
4. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
5. Click PRINT, the maintenance task is displayed in preview mode.
6. Click the print button  to print the maintenance task or click the close dialog button  to return to the maintenance screen.

How to email a maintenance task

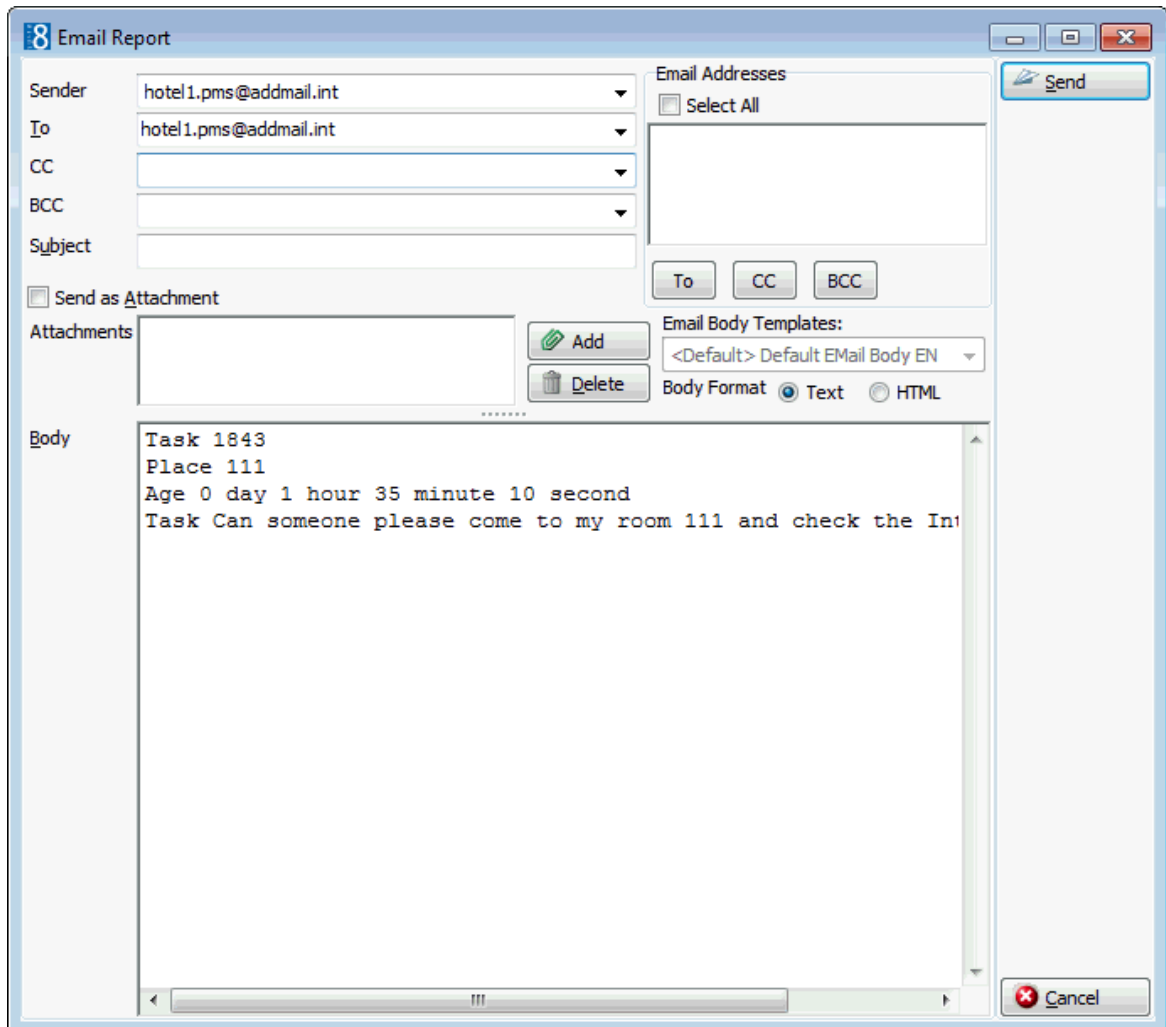
1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.

The Maintenance dialog box is displayed; all the NOT RESOLVED maintenance records are listed by default.

2. Select the maintenance task to be sent by email and click the PRINT button.

The Maintenance Task Print dialog box is displayed.

3. In the TEMPLATES box click the drop-down arrow and select the template to be used.
4. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
5. Click EMAIL, the document is generated and the Email Report dialog box displayed.

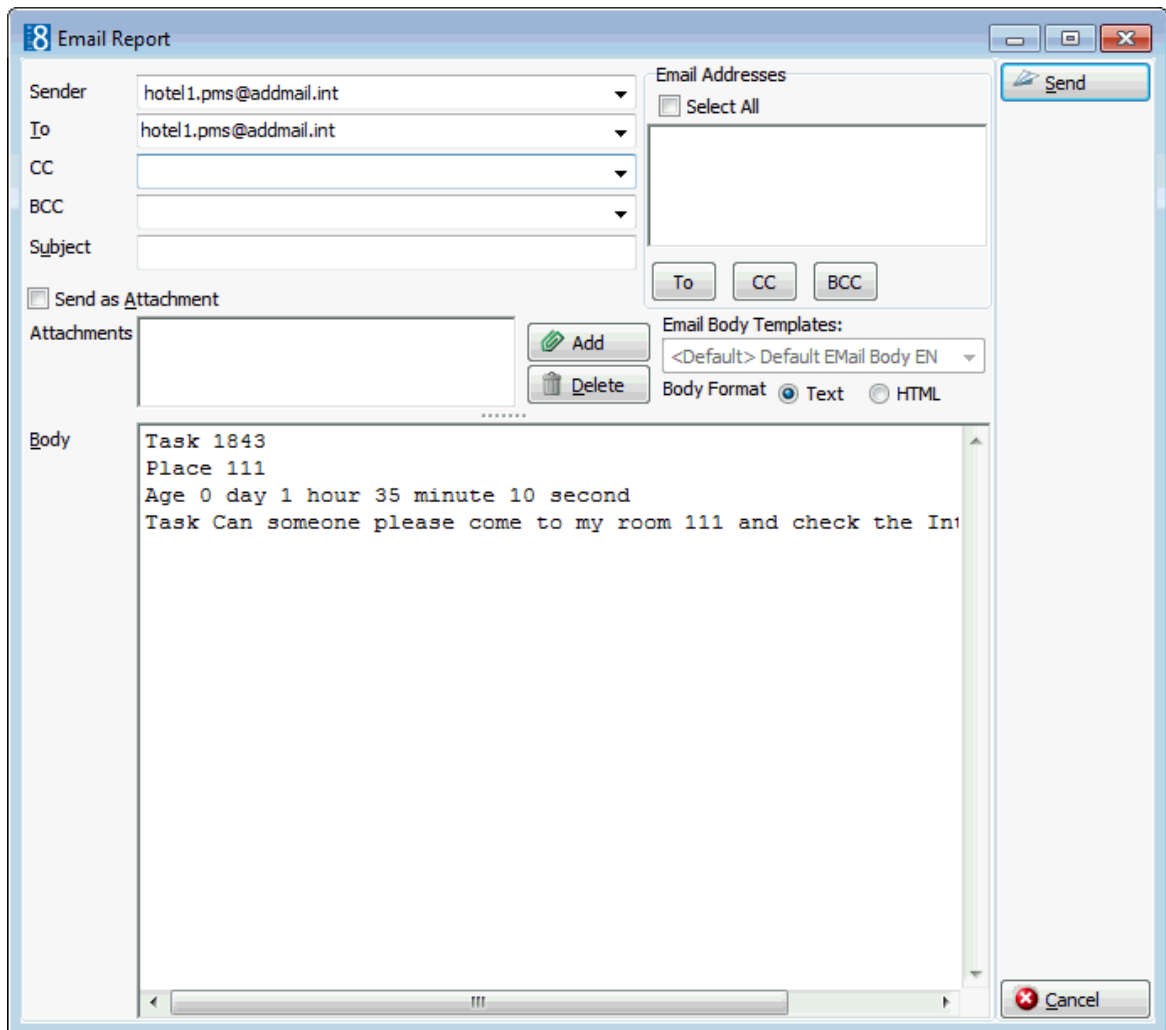


6. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
7. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
8. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.

9. Enter the topic of the email in the SUBJECT box.
10. In the BODY box, make sure that all the entered information is correct; any necessary changes can be made at this time.
11. Click SEND, the document is generated and the email sent.

How to email a maintenance task as an attachment

1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
The Maintenance dialog box is displayed; all the NOT RESOLVED maintenance records are listed by default.
2. Select the maintenance task to be sent by email and click the PRINT button.
The Maintenance Task Print dialog box is displayed.
3. In the TEMPLATES box click the drop-down arrow and select the template to be used.
4. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
5. Click EMAIL, the document is generated and the Email Report dialog box displayed.

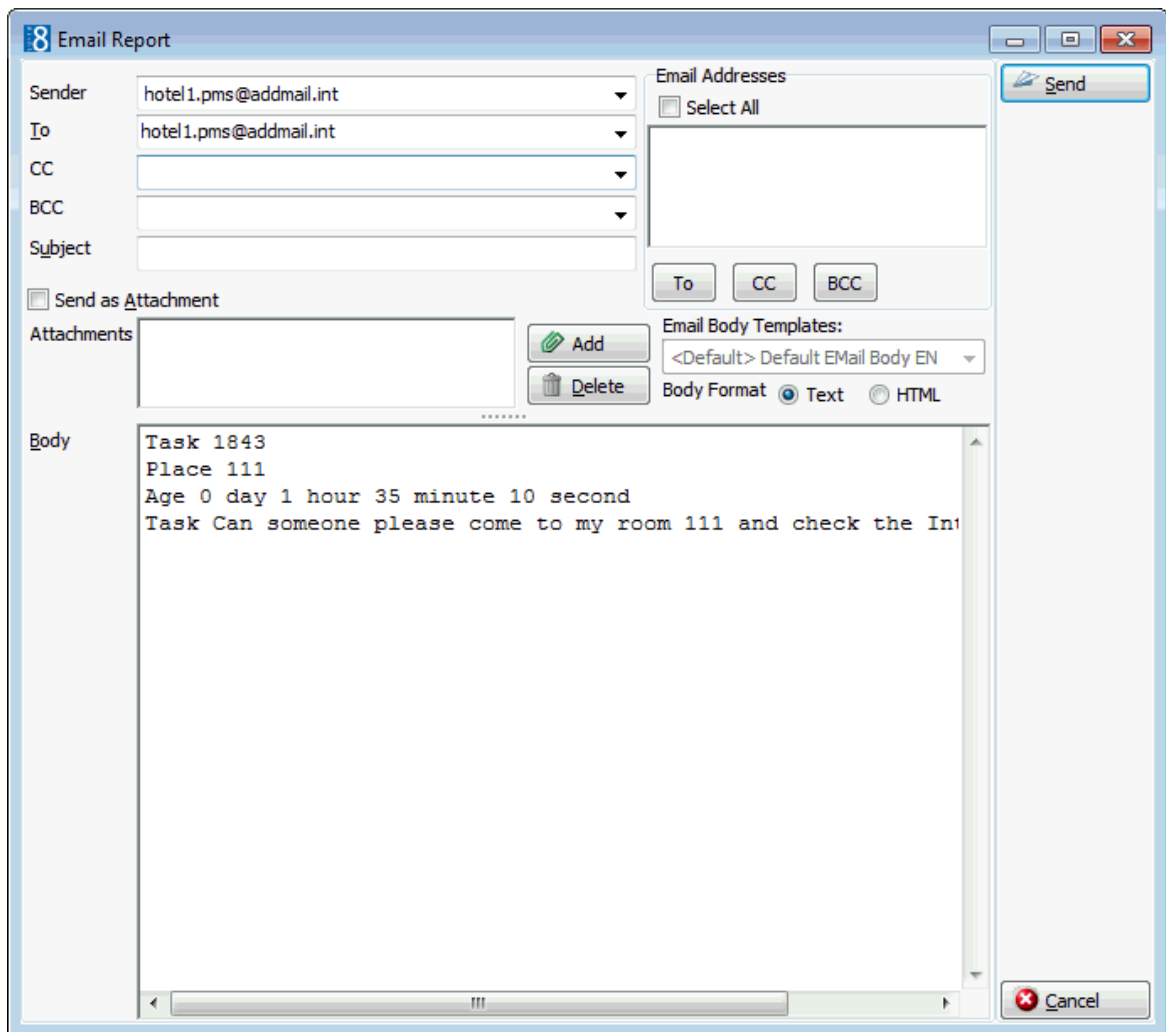


-
6. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
 7. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
 8. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.
 9. Enter the topic of the email in the SUBJECT box.
 10. Select the SEND AS ATTACHMENT check box if the document should be sent as an attachment rather than in the body of the email.
 11. To edit the document click the EDIT ATTACH. button, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
 12. In the FORMAT box select the format for the attachment.
 13. In the BODY box enter the text which should be included in the body of the email.
 14. Click SEND, the document is generated and the email sent.

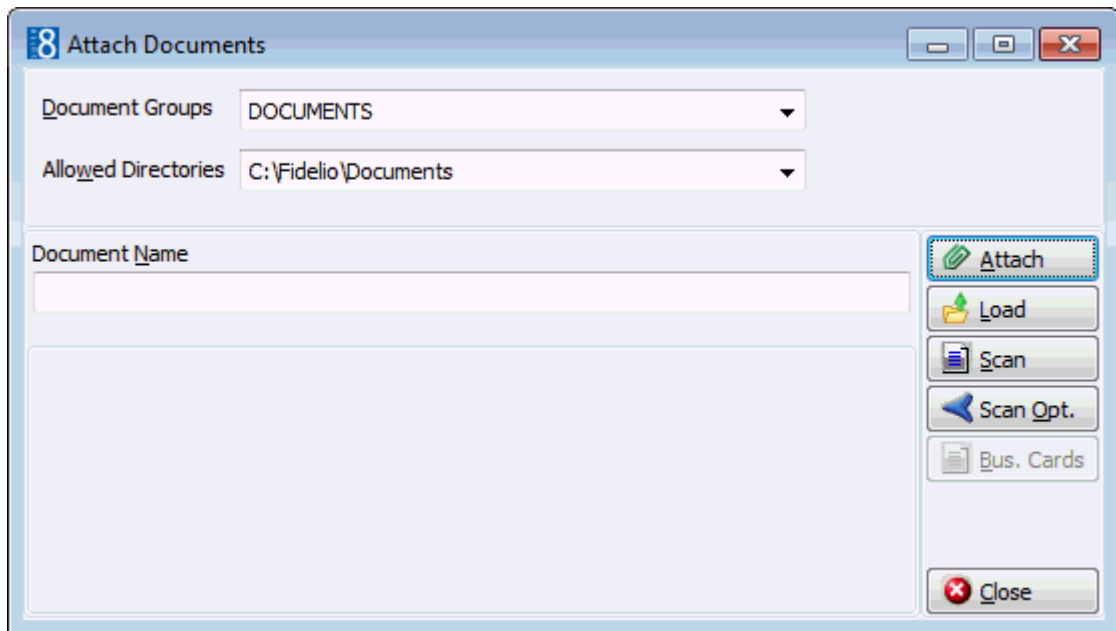
Note: Attachments sent in PDF format are automatically password protected so that no changes can be made to the original PDF.

How to email a maintenance task with an attachment

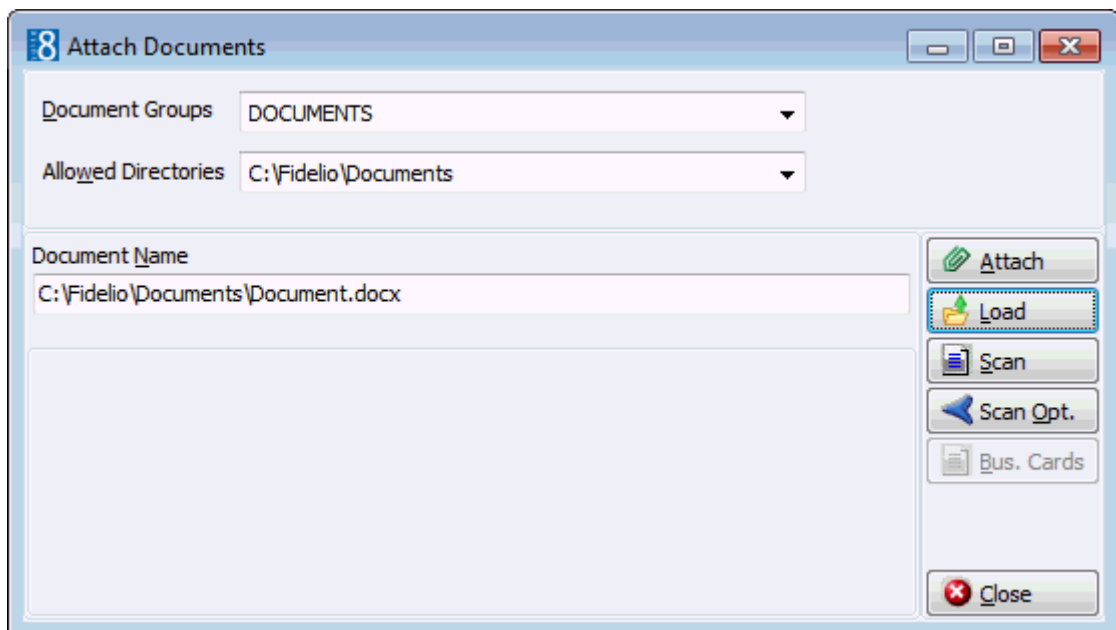
1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
The Maintenance dialog box is displayed; all the NOT RESOLVED maintenance records are listed by default.
2. Select the maintenance task to be sent by email and click the PRINT button.
The Maintenance Task Print dialog box is displayed.
3. In the TEMPLATES box click the drop-down arrow and select the template to be used.
4. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
5. Click EMAIL, the document is generated and the Email Report dialog box displayed.



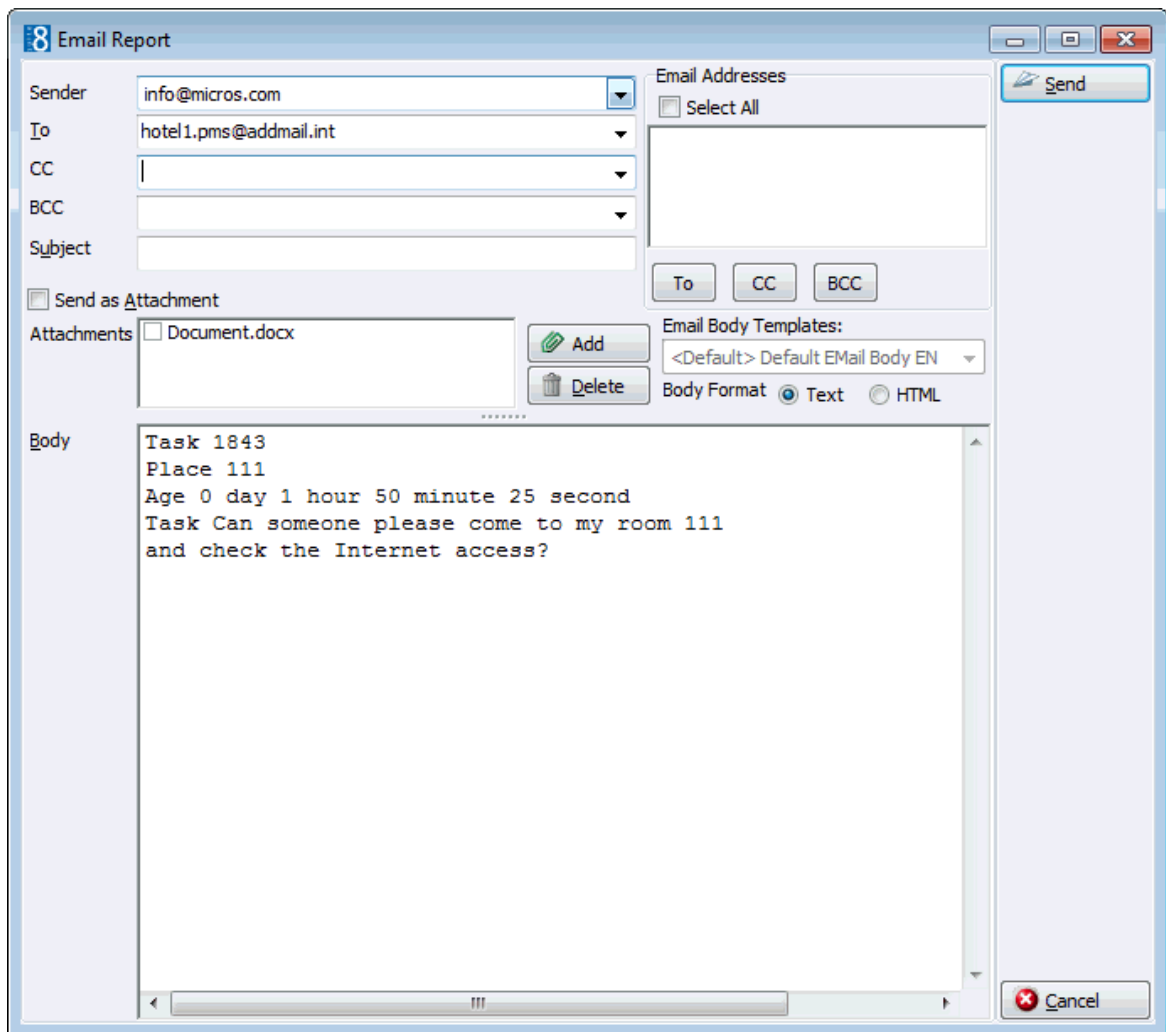
6. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
7. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the Select All button and then the CC button to select all the available email addresses.
8. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.
9. Enter the topic of the email in the SUBJECT box.
10. Click ADD, the Attach documents dialog box is displayed.



11. In the DOCUMENT GROUPS list, select the document group required.
12. In the ALLOWED DIRECTORIES list, select the allowed directory required.
13. Click BROWSE to display the list of documents.
14. Select the required document and click OPEN, the Document Name field is filled.



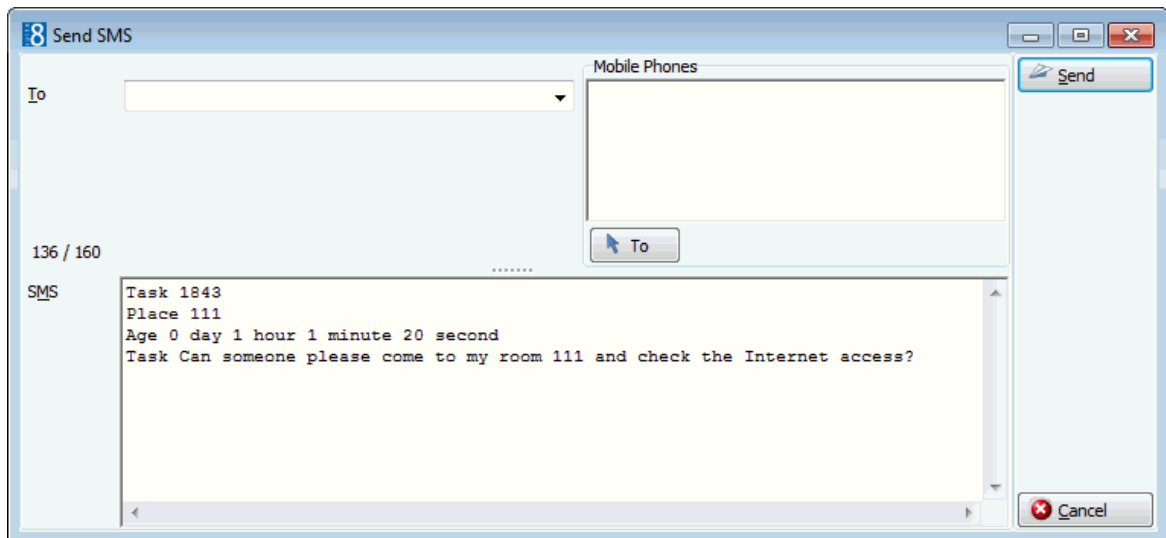
15. To attach the document, click ATTACH, the document is shown as a linked attachment on the email report dialog box.



16. In the BODY box, make sure that all the entered information is correct; any necessary changes can be made at this time.
17. Click SEND, the document is generated and the email sent.

How to SMS a maintenance task

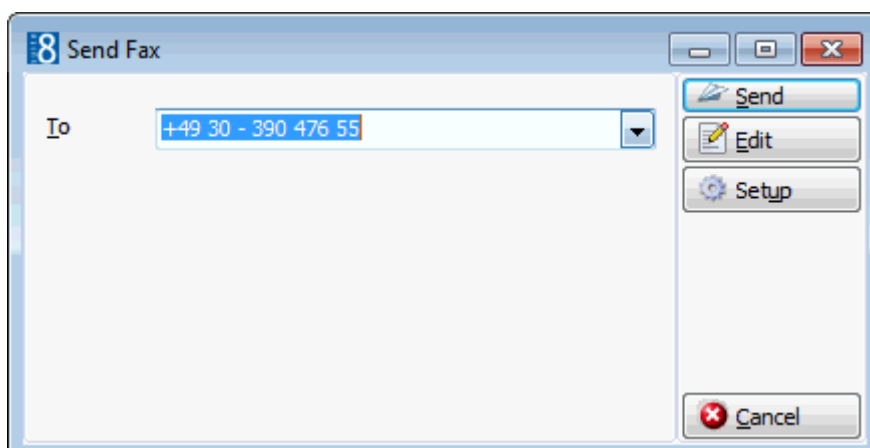
1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
The Maintenance dialog box is displayed; all the NOT RESOLVED maintenance records are listed by default.
2. Select the maintenance task to be printed and click the PRINT button.
The Maintenance Task Print dialog box is displayed.
3. In the TEMPLATES box click the drop-down arrow and select the template to be used.
4. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
5. Click SMS, the Send SMS dialog box is displayed.





6. The To box is automatically completed with the mobile phone number for the employee responsible for this task, this can be changed by clicking the drop-down arrow and selecting the mobile phone number to which this SMS should be sent or by selecting the required mobile phone numbers from the list of available in the panel on the upper right-hand side and clicking the To button.
7. In the SMS box, make sure that all the entered information is correct; any necessary changes can be made at this time.
8. Click SEND to send the SMS.

How to fax a maintenance task

1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
The Maintenance dialog box is displayed; all the NOT RESOLVED maintenance records are listed by default.
2. Select the maintenance task to be printed and click the PRINT button.
The Maintenance Task Print dialog box is displayed.
3. In the TEMPLATES box click the drop-down arrow and select the template to be used.
4. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
5. Click FAX, the Send Fax dialog box displayed.



-
6. The To box is automatically completed with the fax number for the employee responsible for this task, this can be changed by clicking the drop-down arrow and selecting the fax number to which this fax should be sent.
 7. To edit the fax click EDIT, the maintenance task is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the maintenance task.
 8. Make sure that all the entered information is correct; any necessary changes can be made at this time.
 9. To schedule the time the fax should be sent, click ADVANCED, the Fax Scheduler dialog box is displayed.
 10. Select when to SEND THE FAX, the default is NOW, to specify a specific date and time select a SPECIFIC TIME IN THE DAY and enter the date and time to send the fax.
 11. Select the FAX PRIORITY, the default is Normal.
 12. Click OK.
 13. Click SEND, the maintenance task is generated and the fax sent.
-  SMS Sending functionality is controlled by the parameter ENABLE SMS SENDING under Setup → Configuration → Global Settings → Interfaces → Misc. Interface 4 tab.
-  The parameters for short message sending for maintenance tasks are defined via the section MAINTENANCE SMS NOTIFICATIONS under Setup → Configuration → Global Settings → Generic → Generic 3 tab.

SMS Log

This option may be used to display the SMS log and is accessible via the option MAINTENANCE on the ROOMS MANAGEMENT menu and on the MEETING PLANNER menu.

The SMS log lists details for SMS's which have been sent regarding maintenance tasks.

How to view the SMS log

1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
2. Select the maintenance task required and click the SMS LOG button.

The SMS log screen is displayed.

- The upper part of the screen consists of search criteria.
- The lower part of the screen displays the search results in grid format.

The screenshot shows the 'SMS Log' application window. At the top, there are search criteria fields: 'Phone' (text input), 'Draft' (dropdown menu set to 'Show all'), and 'Sent' (dropdown menu). Below these are 'From' and 'To' dropdown menus, and two checked checkboxes for 'Successfully' and 'Failed'. On the right side, there are buttons for 'Search', 'Clear', and 'Details'. The main area contains a table with the following columns: Recipient, Sent, No. of atte..., Last Attempt, Sent, Error, Confirmation, and Draft. The table is currently empty.

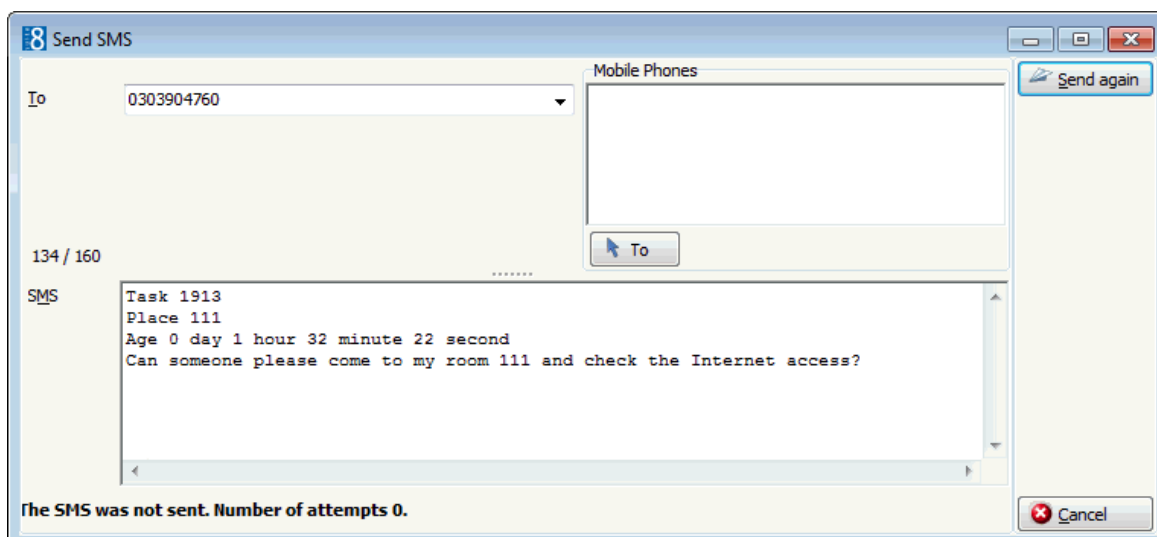
3. Complete the search criteria and click the SEARCH button.

All SMS's meeting the search criteria entered are displayed.

The screenshot shows the 'SMS Log' application window with search results. The search criteria are the same as in the previous screenshot. The table now contains one row of data:

Recipient	Sent	No. of atte...	Last Attempt	Sent	Error	Confirmation	Draft
0303904760	16/08/11 5:41:23 PM	0		No			

4. Select the required SMS and click the DETAILS button to display the SMS Report screen.



5. Click SEND AGAIN to re-send the SMS or click CANCEL to exit the SMS report screen.
6. Click CLOSE to exit the SMS log.

SMS Log search criteria

Fill in this field	With this information
Phone	The phone number to which the SMS was sent.
Sent	
From	Select a date from the calendar from which to list log entries.
To	Select a date from the calendar until which to list log entries.
Successfully	Select this option to view SMS's which were sent successfully.
Failed	Select this option to view SMS' which were not sent successfully.

Email Log

This option may be used to display the email log and is accessible via the option MAINTENANCE on the ROOMS MANAGEMENT menu and on the MEETING PLANNER menu.

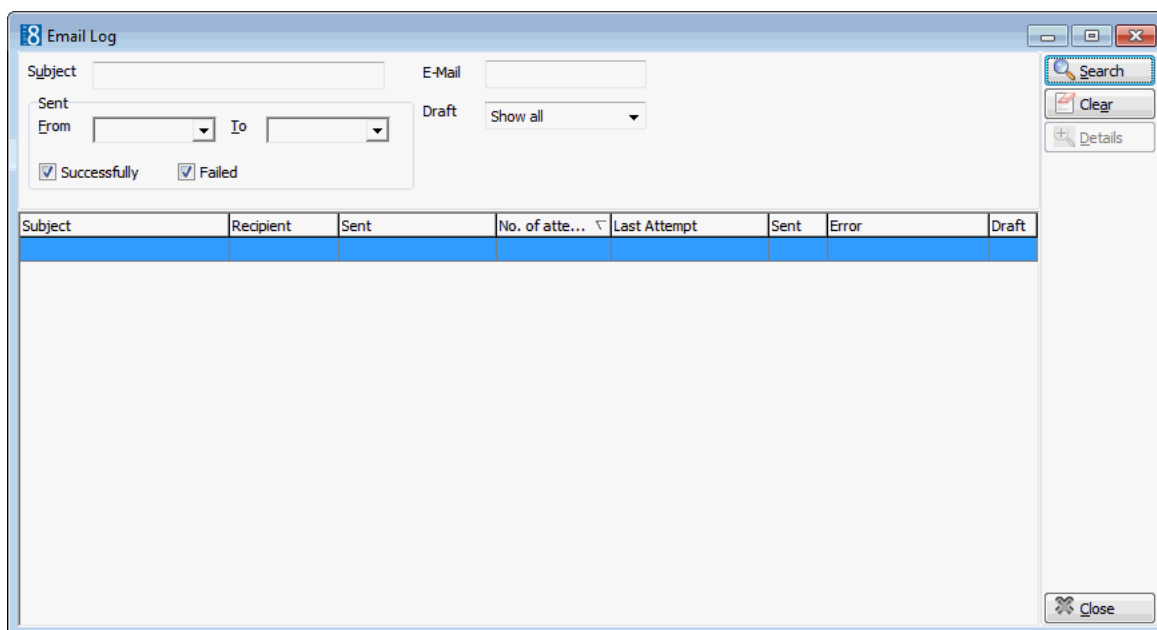
The email log lists details regarding the emails which have been sent regarding maintenance tasks.

How to view the email log

1. Click the ROOMS MANAGEMENT menu or the MEETING PLANNER menu and select MAINTENANCE.
2. Select EMAIL LOG.

The Email log screen is displayed.

- The upper part of the screen consists of search criteria.
- The lower part of the screen displays the search results in grid format.



3. Complete the search criteria and click the SEARCH button.
All emails meeting the search criteria entered are displayed.
4. Select the required email and click the DETAILS button to display the Email Report screen.
5. Click SEND AGAIN to re-send the email, click PRINT to print the email or click CANCEL to exit the email report screen.
6. Click CLOSE to exit the email log.

Email Log search criteria

Fill in this field	With this information
Subject	The text that was entered in subject of the email.
Email	The email address to which the email was sent.
Sent	
From	Set by default to today's date, but can be changed as required.
To	Set by default to one week later than today's date, but can be changed as required.
Successfully	Select this option to view emails which were sent successfully.
Failed	Select this option to view emails which were not sent successfully.

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