AutoClerk User Guide

Reservations

Table of Contents

Copyright Information

Copyright 2017

AutoClerk User Guide Reservations

AutoClerk, Inc.

Address: 1981 North Broadway, Suite 430, Walnut Creek, CA 94596

Phone: 925.284.1005

Fax: 925.284.3423

URL: www.autoclerk.com

1. Reservations

This chapter details the features and commands associated with the Reservations menu, as shown in Figure 1.
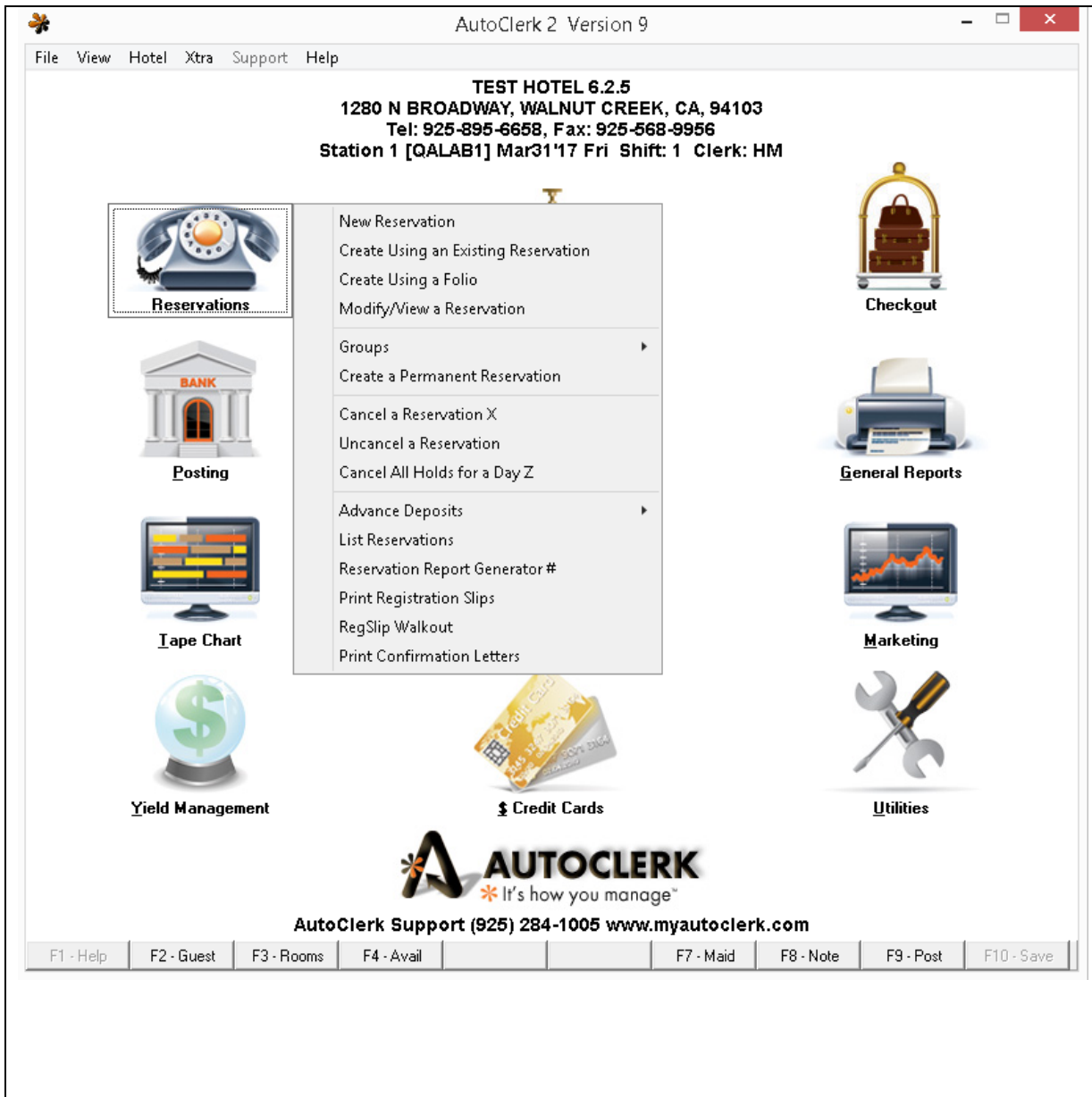
Figure 1: Reservations Main Menu

Reservation Form Fields and Buttons

The following section contains a brief description of the fields and buttons present on the New Reservation form. Any field with a label in blue is a mandatory field. You must fill in mandatory fields for AutoClerk to save a reservation. An example form is shown in **Error! Reference source not found.**.

Figure 2: New Reservation Form

If you are a Best Western property, you will have additional fields and menu/tool bar options. Please review the Best Western User Guide for more details.

Tool Bar

1. *File*

    a. Show Share-withs: Produces a report listing all Reservations that are sharing with a reservation or an inhouse guest.

    b. Show Bill-Tos: Produces a report listing all reservations and inhouse guests that are billing to another reservation or inhouse folio.

    c. Exit: Closes the New Reservation form and returns the user to the AutoClerk main menu.

2. *Profiles*

    a. By Last Name: Redirects you to Guest Profiles starting either with the guest's last name entered in the Last Name field, or at the beginning of the data if no name is entered.

    b. By First and Last Name: Redirects you to Guest Profiles starting either with the guest's last name and first name as entered in the Last Name and first name fields, or at the beginning of the data if no names are entered.

    c. By Company: Redirects you to Company Profiles starting either with the Company's name as entered in the Company field, or at the beginning of the data if no name is entered.

    d. You can also access profiles for the particular field by either hitting the F1 key once you are in one of the above field(s); or by clicking on the magnifying glass and the right-hand side of the field(s).

3. *Menu*

    a. Allows you to open another instance of AutoClerk.

Conf Button

Once a reservation is complete and has been saved, clicking the Conf (Confirmation) button gives the user specific details on the reservation such as the creation date and clerk; modification date and clerk; and CRS information.

Clicking File on the Toolbar allows you to copy the information to Notepad. The Toolbar also includes View, Toolbar (the F keys) and Menu.

Stay Total Button

Clicking the Stay Total button allows you to see the deposit, room charges due, and applicable taxes associated with a reservation. It is displayed both as a total and on a day-to-day basis. You have to have entered basic stay information such as dates, room type and rate class before the Stay Total can be calculated.

Arrival

The guest's arrival date. The default is the current day. You can enter the number of days in the future the guest plans to arrive, and the arrival date is automatically

calculated. You can also select a guest's arrival date from a calendar, which appears when you click on the down arrow to the right of the Arrival Date field.

Departure

The guest's departure date, which calculates the number of nights he is staying. The default is one (1) night. You can enter the number of days a guest wishes to stay, and the departure date is automatically calculated. You can also select a guest's departure date from a calendar, which appears when you click on the down arrow to the right of the Departure Date field.

Res Type Pull-Down

The Res Type menu allows you to choose from five different Reservation types:

1. GTD/Hold (Guaranteed Hold): This is the most common type of reservation and is the default.

2. Share with: A share-with is created when you know a guest will be sharing a room with another guest and you want to create a reservation for them instead of waiting until check in. As soon as you select Share with status, the 'Assign Primary Res to Share-with' form appears as shown in Figure 3.
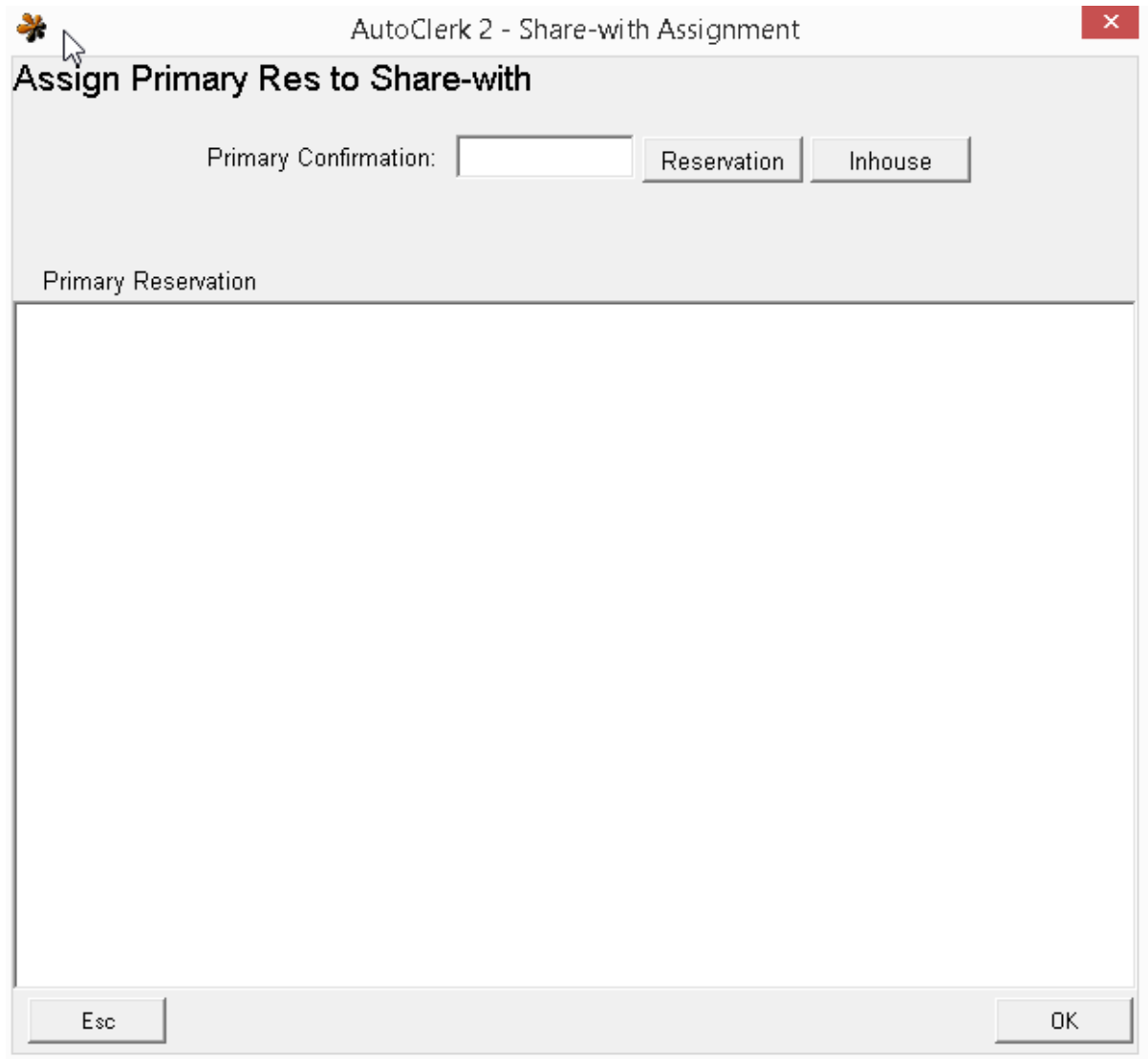
Figure 3: Assign Primary Res to Share-with

a. Clicking the Reservation button brings you to an 'Assign Primary Res to Share-with' selection list showing arrivals for the arrival date of the Share-with you are currently making.

b. Clicking the Inhouse button shows you a list of inhouse guests in various formats.

c. You must select either a reservation or an inhouse guest as the Primary for the Share-with.

   i. Once you have selected a Primary and clicked OK, you are returned to the New Reservation form, to complete the reservation.

d. You can either change Rooms to 0, or wait until the reservation is saved and it will be changed automatically. This is because a Share-with reservation is for 0 rooms and has a rate of $0.00.

   i. Zero rooms is set because it is not taking a room out of inventory. That was done when the Primary was made.

   ii. The $0.00 rate can be changed at check in, depending on if the guest is splitting the rate with the Primary or not.

3. Gift Cert (Gift Certificate): A Gift Certificate reservation can be either purchased or donated. Most donated gift certificate 'reservations' have a specific 'expiration date'; whereas a purchased gift certificate does not. The expiration rules for a purchased gift certificate depend on your local laws/regulations.

   a. If the gift certificate is being purchased, put both the arrival and departure dates as the current day. Once the deposit is applied, the reservation will stay in the system until used.

      i. If the gift certificate is being donated and has an expiration date, then the expiration date is the departure date.

   b. If the certificate is for a specific room type enter that. If it is for any room type, you can use 'XX' as the room type, if you have that room type configured.

   c. When making Gift Certificate reservations, a good rule of thumb is to have the last name be either just the Gift Certificate number, or 'GC [GC#]'. Consistency will make it easier when guests are booking their reservation as all they will need is the number. This is also useful with donated gift certificates as the property will not know the name of the guest who receives the gift certificate.

   d. Always leave plenty of notes in the Large Note field about the reservation; such as how much it is worth, expiration date, room preferences, etc. This will help the staff when the reservation is actually booked.

   e. Be sure to post the payment as an Advance Deposit on purchased Gift Certificates.

   f. When the guest calls to redeem their gift certificate, use Modify/View a reservation.

      i. Change the Arrival/Departure dates, Room Type, Rate, Guest Name and Address information as applicable. If it is a donated, your policy may be to get a credit card guarantee as well.

4. Wait List (Waiting List): Some scenarios of creating a Wait List reservation can be taken if a guest needs an additional night(s) and the property is booked; the property is booked and a guest needs a room; and/or a guest has a room and needs additional rooms.

a. Arrival and Departure dates should be the dates the guest needs.

b. If the guest wants a specific room type, enter that. If they will take any room that becomes available, you can use 'XX' as the room type, if you have that room type configured.

c. ALWAYS get a phone number so you can contact the guest if a room opens up.

d. NEVER get a credit card number or give the guest the Wait List reservation's confirmation number. If you do, the guest could show up and claim that you 1) took the credit card number; and/or gave them a confirmation number so it is a valid reservation and not a wait list.

e. When a cancellation occurs and you want to check to see who is on the Wait List, navigate to Reservations – List Reservations – Options.

    i. Modify the 1) Search by Date; 2) Starting/Ending Date; and 3) Include Status fields as applicable and as shown in Figure 4.
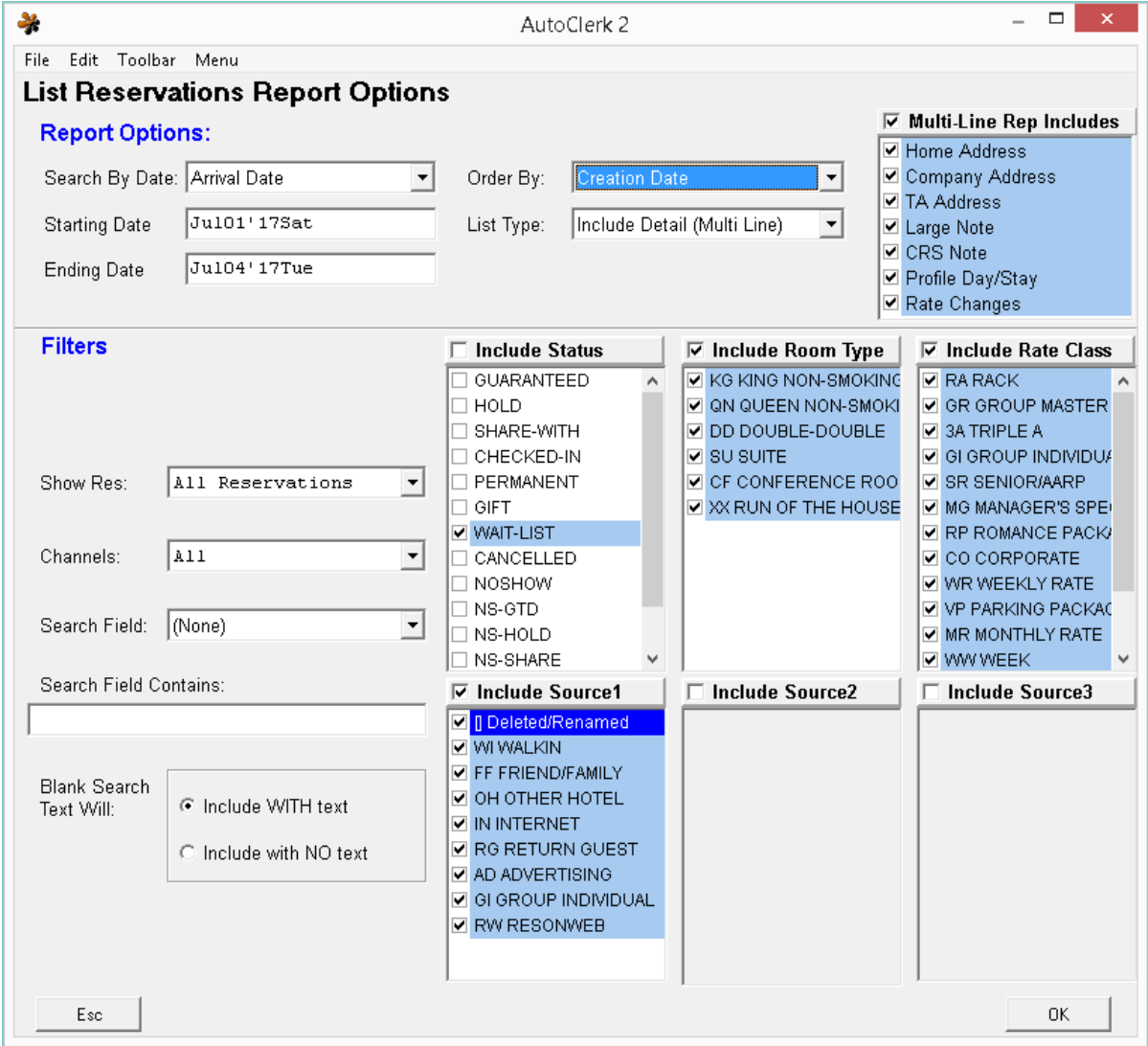
Figure 4: Wait List

ii. By searching by Arrival Date and ordering the report in Creation date, you will get a list of Wait List reservations for the arrivals dates you now have an opening for, as well as in the order they were created. This way, you can call the Wait List based on who was on it first.

1. When calling guests on the Wait List, most properties will not leave a message if there is no answer, but instead move on to the next guest on the list, if applicable.

iii. If one of the guests responds and will take the room, use Modify/View a Reservation to change it to a status of GTD and get the rest of the necessary guest information.

1. If the guest will be inhouse and is able to stay in the same room type, be sure to cancel the wait list reservation and extend the existing reservation.

2. If the guest is changing rooms during their stay, be sure to put that information in the Large Note field so the move can be avoided, if necessary.

5. Prof Update (Profile Update): Profile Update is a way to update a guest's profile without actually making a reservation. An example would be a regular guest has moved and would like to update his information.

   a. Once you have saved the Profile Update reservation, you should merge the guest's profile records so the most updated record is used. (See the Utilities and Functions User Guide for more information on Profiles and Merging).

Rooms

Enter the number of rooms of the same room type that the guest wants to reserve. The default is one (1). You can enter up to 9 rooms. If you enter more than one, when you have completed and saved the reservation, AutoClerk will automatically create clone reservations with separate confirmation numbers.

Rm Type

Depending on what Room Types you have available, enter the Room Type the guest wants. If you know your property's room type codes, you can enter the code. Clicking on the down arrow gives you a list of the property's room types and their associated abbreviations. Select a room type from the available list.

Smkr

Enter a Y for yes, if the guest is a known smoker. You can also use this if the guest requests a room in which he or she can smoke.

Room

Clicking on this menu allows you to select a specific room for the reservation.

1. When you click on the down arrow, or hit Enter, the F3-Rooms form opens. The screen auto-fills in the room type, number of nights and arrival date based on the reservation. You can also see a list of room features.

2. Click the OK button, and you are brought to a list of clean, unblocked rooms you can assign. Select a room by clicking on it. You are brought back to the main New Reservation form with that selected room number now displayed in the field.

   a. Just because a room number is listed, does NOT mean that you have availability for that room type. You should always check your Availability either through the F4 key, or looking at the Minimum Available line on the F3-Rooms form.

Requested Checkbox

Check this checkbox if the guest has requested a certain room. This feature is used for those guests who travel frequently, for example, and desire to stay in the same room each time they visit.

People Fields

In the first field, enter the number of adults associated with this reservation. In the second field, enter the number of children. In the third field, enter the number of infants associated with the reservation.

Depending on how your rates are configured, the rate for the stay may change depending on the numbers you enter here.

Crib, Roll(away) Checkboxes

Check the box if a crib is requested by the guest. Check the second box if a rollaway bed is requested by the guest.

Depending on how the property's rates are configured, the rate may change based on whether these boxes are checked.

Pet/Check Box 3

Check Box 3 can be custom labeled. In this example, it has been labelled 'Pet'. The customization is done in ACConfig - Defaults/Options – Reservation Options. This is true for the User Check Boxes User Fields (See below).

Rate Class

Enter the Rate Class for the reservation. The default is the property's designated Rack rate class. In this example, it is RA (Rack). The default is set in ACConfig – Rates – Rate Setup Grid – Edit – Set Default Rate Class.

If you know your property's rate type codes, you can enter the code. Clicking on the drop down opens a list of your property's Rate Classes and their abbreviations. Select a rate class from the available list.

Rates

The reservation's rates are calculated based on several parameters, including but not limited to: day of the week, time of year, room type, rate class, and/or number of occupants.

When you enter the arrival and departure dates, if a stay extends over a weekend, the weekday and weekend rates appear in these fields, even if they are the same.

You can modify any day's rates by clicking on the drop-down menu and adjusting the rate in the Quoted cell.

Hide Rates

Check the checkbox if you do not want the guest to see the room rate on their registration slip or folio. For example, if the room was reserved through an online travel

website, such as Expedia, Travelocity, or FIT. Depending on the rate class you select, this box may already be checked.

ETA

Click on the drop down menu and select the Estimated Time of Arrival (ETA) for a guest. A default time can be set in ACConfig – Defaults/Options – Set Reservation Options.

Last Name Field and Lookup

Enter the guest's last name this field. When you click on the Magnifying Glass icon, you can select the guest's last name from a list of stored guest profiles. If a guest has stayed in the hotel before, selecting the guest's name from the Profile list, and clicking the Copy/OK button, automatically fills in the new reservation form with that guest's contact information.

First Name Field and Lookup

Enter the guest's first name in this field. When you click on the Magnifying Glass icon, you can select the guest from a list of stored guest profiles. By entering the guest's last and first name, when you click on the Magnifying Glass icon, AutoClerk narrows the search to start with the first name. If a guest has stayed in the hotel before, selecting the guest's name from the Profile list, and clicking on the Copy/Ok button, automatically fills in the new reservation form with that guest's contact information.

Title and Lookup

Click on this menu. From the list of titles select a title for the guest.

Tax Exempt

If the guest informs you they are tax exempt, click on the Tax Exempt button. The Tax Exemptions box opens as shown in Figure 5.
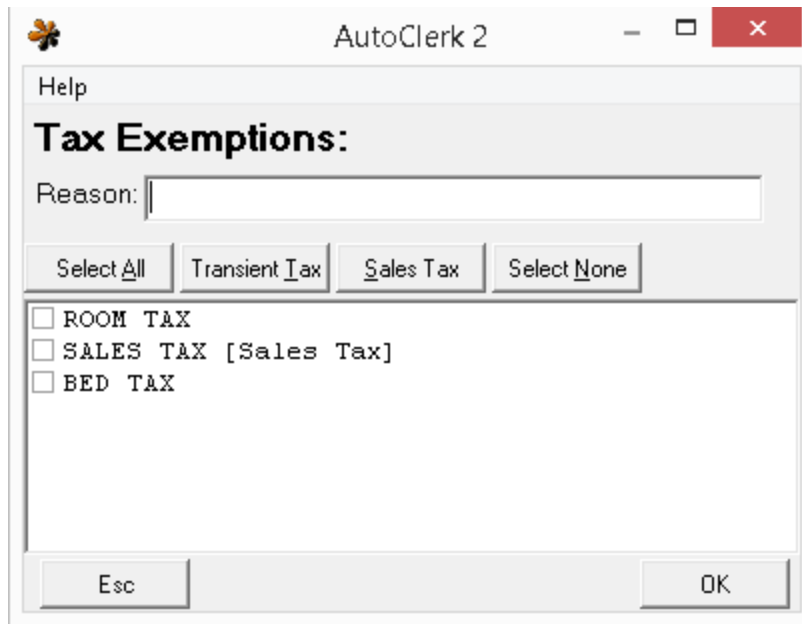
Figure 5: Tax Exemptions

It lists all of your configured taxes. You can either check one of the tax type buttons above the list, or select specific tax(es) to be exempt. Enter a reason for tax exempt billing in the Reason field. This will sow on various Tax Exempt reports and is helpful if you are audited.

Bill-To Button

Click on this button to open a list of the property's chargeable transactions, such as Room or Parking. This is where you set up the guest's charges to be billed to a different reservation or inhouse folio. Check the applicable boxes, and then select the reservation or inhouse folio to which you wish to bill the charges.

Address/Contact Buttons

Enter the guest's home address information. If necessary, or if it your property's policy, click on the Company tab and enter the guest's company contact information. Group contact information appears if the reservation is part of a group.

If you need more address lines, and/or want to enter in additional information, click on the Details button. The additional information varies based on whether you enter Home, Company, or Group contact information. If data has been entered here, the label will be in red.

When entering U.S. or Canadian addresses, you can leave the City/State fields blank and simply fill in the Zip Code. AutoClerk auto fills the City/State.

Conf Letter

The Confirmation (Conf) letter menu contains numbers associated with configured confirmation letters. Use the drop down to select the appropriate Confirmation letter.

For more information on setting up Confirmation letters, contact AutoClerk Support, (925) 284-1005, Option 2.

Pay Type

Enter the Pay Type code for how the guest is going to guarantee their reservation. If you clicking on the Pay Type button, you can select a payment type from the list. If the pay type is cash, the status of the reservation will be hold, until an advance deposit is posted. Other pay types listed are the configured credit card types and City Ledger accounts.

If you select a City Ledger account, a popup appears asking if you want to use the CL account address as the Company address. If you answer yes, then the Company address fields will be auto-filled.

Pay Type Button

The text on the Pay Type button changes according to the pay type you select from the Pay Type menu. For example, if you select Visa, clicking the Pay Type button opens a form in which you can enter the credit card number, name of the card holder, expiration date, and authorization code.

If you select a City Ledger account, the name of the account appears. If you click on the button, you will see the City Ledger account contact information. If the name is flashing in red, then the City Ledger account has an F8 note which should be viewed for any additional information.

Show Guarantee Info

Clicking on this button opens a box in which you can view the default Deposit Due, Amount Needed, and Cancel Deadline.

Entering information in the form will show on the Deposits Due report.

Gtd/Cxl Type Button

Clicking on this button resets the form of guarantee and cancellation that is pre-configured based on the rate class and arrival date on the reservation.

Gtd/Cxl Type Pull-Down

Clicking on this menu allows you to choose from a list of guarantee policies. However, when you enter the rate class and arrival date, the form of guarantee and cancellation policy automatically changes to the configured settings.

Gtd/Cxl Time Pull-Down

Click on this menu to change the configured cancellation policy.

Sources

Enter in the appropriate Source Code(s) for the reservation. You can click on the drop down for a list to select from. Required Source fields, if any, are determined by your property.

Channel

The Channel field auto fills when reservations are made by third parties. For example, reservations made through the property's website using the ResOnWeb interface auto fill with 5. A property may decide to assign staff their own numbers (1-49) to use for commission purposes.

User Field 1

This is a customizable field through ACConfig. See Pet/Check Box 1 above for more information.

Specials

The Specials field can be used for requests or details specific to the reservation. It can also be used for specific confirmation letters to be sent. In addition, it can be used as a filter when obtaining a list of arrivals.

If you have certain configuration options enabled, the Specials field is available on the Reservation form, but at check-in, is relabeled Checkin Slip and contains the checkin slip number

Memo

Clicking on this button opens a form which has fields for the following: Housekeeping, Telephone/F2, Checkin Slip, Checkouts Due, Group Report and Note. Fill in the fields with applicable information.

If you fill in specific fields, they will appear on the listed forms/reports:

1. Housekeeping: Appears on the daily Housekeeping Ordered Report.

2. Telephone/F2: Appears when the F2-Guest button is selected, as part of that guest's information.

3. Checkin Slip: Appears on the guest's check in slip and it therefore visible to the guest.

4. Checkouts Due: Appears on the Checkouts Due report if run with options.

5. Group Report: Entries here can show on several reports/areas, some by default and some if only configured. These include folios/letters; the Auto Post form, Check out form, Report Generator and Change Log.

If you enter text in the field on the main Reservation form, the other memo fields are auto filled. Or, you can click on the Memo button and select where you want the note to appear.

If you enter text in the Note portion of the Memo form, this text appears in the Note field on the New Reservation form. You can also type directly into the Note field on the New Reservation form.

Note

This large note field gives you 2048 characters to put a substantial note about the guest, the stay, etc. It is also visible on the checkout form but is not visible to the guest.

Ref #

This can be used by companies for a specific stay identifier. For example, a trucking company has a City Ledger account and tracks its employees' stays by a reference number. This number will show on the CL Invoice as additional reference.

Some of the third-party reservation systems, or CRSs may also pass along a Ref # when the reservation is sent to AutoClerk.

Chg Log

This field tracks changes to reservations and inhouse folios. Once the original reservation is saved, any subsequent changes are logged here. The log can also be seen at the checkout screen, in historical folios as well as in guest profiles.

CRS Type

This field auto fills if a reservation comes into AutoClerk via a Centralized Reservation Service (CRS), such as Best Western.

CRS Conf

When a reservation comes into AutoClerk from a CRS, this field auto fills with that specific CRS' confirmation number.

User Field 2

This is a customizable field through ACConfig. See Pet/Check Box 1 above for more information.

Checkbox 1

This is a customizable field through ACConfig. See Pet/Check Box 1 above for more information.

Checkbox 2

This is a customizable field through ACConfig. See Pet/Check Box 1 above for more information.

Month of Birth/Anniversary

In the First field, enter the month of birth for the first guest. In the Second field, enter the month of birth for the second guest. In the Anniversary field, enter the month of a guest's anniversary. This is a property specific configurable option.

Travel Agency and Lookup

Clicking on the Travel Agency button opens a form in which you can enter travel agency contact information. Clicking on the Magnifying Glass icon redirects you to Travel Agency profiles. If the travel agent has booked at the hotel before, selecting the agency's name from the Profile list, and clicking the Copy/OK button, automatically fills in the new reservation form with that agency's contact information.

If necessary, update any of the contact information, for example, a different agent making the booking.

Function Buttons

The function buttons that run along the bottom of the screen, with the exception of Esc and F10, allow you to interrupt what you are working on and either get information or perform another task without losing what you are working on. The descriptions here focus on their use in Reservations. Additional uses of the Function Keys can be found in the Utilities and Functions User Guide.

The F2 keys' functions are:

Esc

Escape allows you to leave the New Reservation form and not save any data already entered. If you want to save the changes, click No when asked, Are you sure?

Your property may have set up Denials. If configured, when you escape from a New Reservation after entering the Arrival and Departure Dates, Res Type, Rooms and Room Types, the Are you Sure? Window includes a third option button labelled Denial. Selecting Denial is a way to track why a customer decides to "deny" making a reservation. For example, rates are too high, or you don't accept pets. It needs to be set up in AutoClerk. It is not a default feature.

F1-Help

This button opens a text box with applicable help for the field you are in or AutoClerk contact information.

- If your cursor is in the following fields, which have a Magnifying glass icon next to them, you can access the Profiles list: Last name, first name, phone numbers, company name, company phones, travel agency, IATA #, and TA phones.

F2-Guest

Use this to lookup guests, search, and check guest messages.

Click the F2 button. The Guest Lookup window appears. This window displays all inhouse, arriving, and checked out guests for the current day as shown in Figure 6.
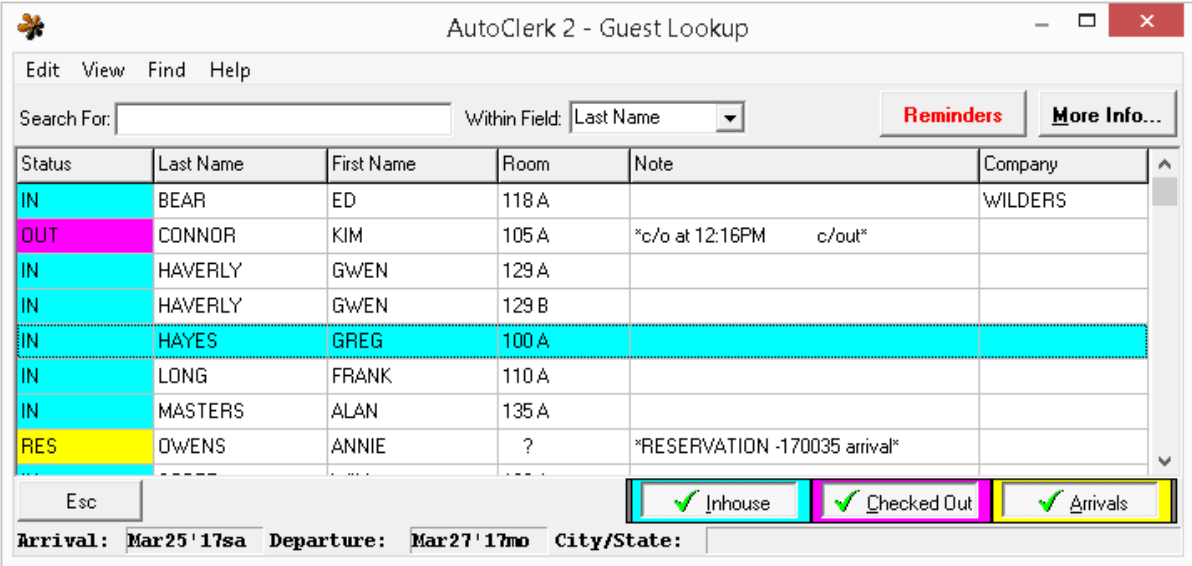
Figure 6: F2-Guest Lookup.

F3-Rooms

You can use this to select a room for the reservation.

Lookup Rooms and Assign a Room to a Reservation

1. Enter the reservation's Arrival and Departure Dates, Res Type, Rooms and Room Type. Either click on the down arrow to the right of the Room field or click the F3 button. The Rooms window appears as shown in Figure 7.
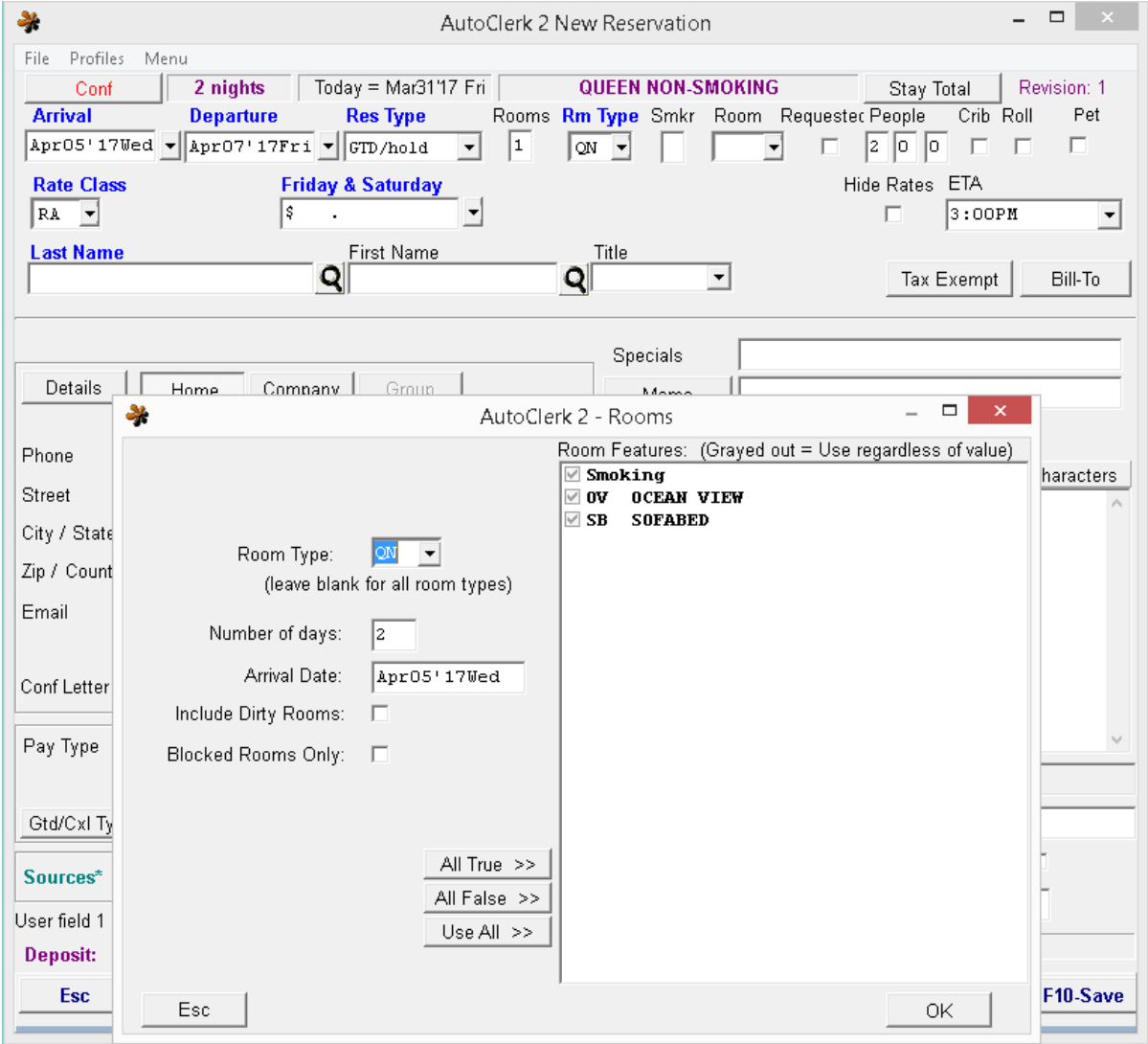
Figure 7: Reservation F3-Rooms

2. Because you are in a reservation and have filled in necessary fields, those fields are auto-filled in the form. Those fields are: Room type, Number of days, and Arrival Date.

   a. When making a reservation, you do not need to check Include Dirty Rooms, unless the reservation is for the current day.

   b. Blocked Rooms Only is intended for check in use.

   c. If you need to find a room with a view, and view is a specified room feature, you can filter all available rooms by this feature.

      i. To search for rooms with certain features shown in the Room Features list, use the following buttons:

1. All True: Checks all the checkboxes.

2. All False: Unchecks all the checkboxes.

3. Use All: Checks all the checkboxes. This is the default.

3. Click the OK button, and the Rooms Grid window opens as shown in Figure 8.

Figure 8: F3-Rooms Results

a. The legend for the last character of the room number is:

   i. V: Vacant and Clean

   ii. D: Vacant and Dirty

   iii. R: Reserved and Clean

   iv. W: Reserved and Dirty

4. Click on the cell with the room number. You are returned to the Reservation form with the selected room number filled in.

F4-Avail

This shows you the number of available rooms by room type. In addition, you can view rates for each room type; LOS rules, if any; and Yield Notes, if any.

1. When making a new reservation, ideally you will select F4 after you have entered the Arrival and Departure dates. The Availability box appears as shown in Figure 9.
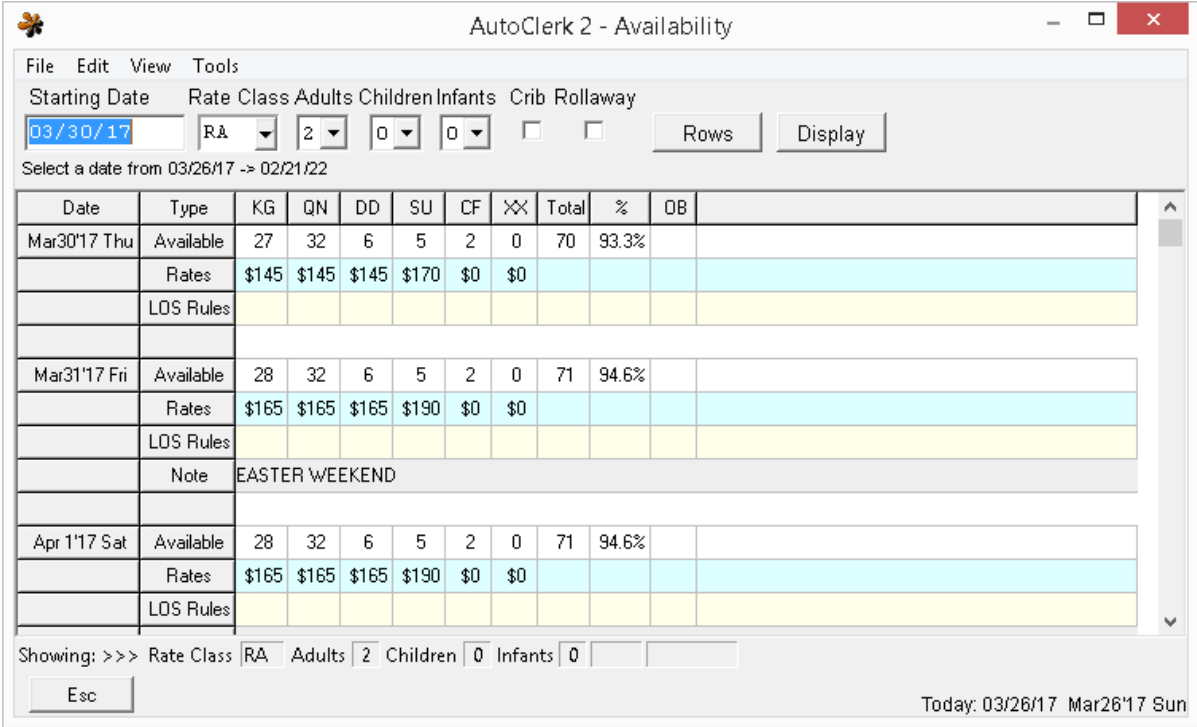
Figure 9: F4-Availability

Toolbar

1. View

    a. Change Views: Allows you to check boxes determine what data you see.

        i. If the Rates box is unchecked, you will not see rates, only availability. It is checked by default.

        ii. LOS Rules are Length of Stay rules. For example, a 3 night minimum,

            1. If checked, your LOS rules will show up in yellow under the Rates row.

        iii. If your rates have cents, you can check the 'Show Cents' box so the rates shown are accurate.

            1. This can be set as a default in ACConfig – Defaults/Options – Options.

        iv. If you have entered Yield Notes, such as big event weekends, check the 'Show Notes' box.

            1. An additional line will show any entered notes in gray.

        v. House Availability is checked by default.

      vi. If you have enabled Rate Levels, then this box can be checked to also show Rate level availability.

      vii. Making a change here remains the same as long as the same user is logged on.

  b. Hide/Show Individual Room Types: Clicking this brings up another checkbox form listing your property's room types. By Checking and/or unchecking the check boxes, you can select which specific room types to show.

  c. Hide/Show Non-sleeping Room Types: Clicking this changes the viewing of room types designated as non-sleeping rooms, i.e. Conference rooms, House use rooms, etc.

  d. Hide/Show Sleeping Room Types: Clicking this changes the viewing of room types designated as sleeping rooms.

  e. Show All Room Types: Clicking this resets to show all designations of room types. It is a way to reset the form without escaping out and coming back in.

  f. Options b-d only are applied to the current F4 session. As soon as you leave the form, the next time you go in, the form resets to the defined defaults.

Parameters

1. The Starting Date field defaults to the current day.

  a. If you click F4 while making a reservation, the Starting Date field auto fills with the Reservation's Arrival date.

2. The Rate Class defaults to your designated Rack rate.

  a. You can change the starting rate class in ACConfig – Defaults/Options – Options.

  b. When making a reservation, you can change the rate class and then hit the Display button to refresh the screen. This is useful to see different rates for different rate classes.

3. Select the appropriate Adults, Children, Infants, Crib, and Rollaway.

  a. Defaults are 1 adult, 0 Children and Infants and unchecked Crib and Rollaway.

      i. These defaults can be changed in ACConfig – Defaults/Options – Options.

Process

1. The arrows on the right side allow you to scroll down through the screens.

2. If you have one or more room type that is overbooked, but your house is not overbooked, the availability shows up in blue.

   a. If you are completely overbooked and your house is overbooked, the availability shows up in red.

3. You can enable an option in which the F4 screen automatically pops-up when the user tabs past the Rooms field when making a new reservation.

   a. If you are interested in this feature, please contact AutoClerk Support at (925) 284-1005, Option 2.

F6-Promos

The F6 button only appears at a Best Western property and under specific circumstances.

1. If you have a reservation or inhouse folio for a BWR member, the F6 button is enabled.

2. Once you are in the reservation or inhouse folio, click the F6 button.

   a. You are re-directed to the 'Available Promotions' window.

   b. You can view which promotional offers the guest is entitled to.

   c. If the guest selects a promotion, highlight the promotion tab, check the 'Use Promotion for this Guest' box and click 'Register'.

   d. The system will call out to BW to register the guest.

      i. When complete, 'Registration complete' will appear at the bottom of the window.

   e. Click OK to return to the reservation/inhouse folio.

   f. The F6 button is not enabled on a new reservation with a BWR member until the reservation has been saved.

F7-Maid

Use this function key to quickly update the status of a room.

F8-Note

Use this function to store concierge notes, such as phone numbers for taxis. You can use this feature as a Rolodex. You can generate a list of existing notes from General Reports→Guest Reports→Notes→All Notes.

F9-Post

Use this feature to post charges to an inhouse room.

F10-Save

The F10 Save button is used to save your work.

New Reservation

Here are general steps for creating a new reservation using AutoClerk:

1. Click on the Reservations icon. The Reservations Main menu appears.

2. Select New Reservation from the menu.

3. Set the arrival and departure dates.

4. Determine the number of rooms of the same room type the guest requires.

5. Set the Res Type. (Gtd/Hold is the default.)

6. Click F4 at the bottom of the screen to view available rooms.

    a. Or tab through the arrival and departure dates, and the Availability screen appears. This setting has to be turned on in AutoClerk. It is not on by default.

7. Select the room type.

8. Enter the number of guests for the reservation.

9. Check the checkboxes for cribs or roll away beds, if applicable.

10. Select the rate class.

    a. Once you tab past the Rate Class, the rate(s) will auto-populate based on previous entered information and how your rates have been configured.

    b. Quote the associated rate.

11. Enter the Estimated Time of Arrival (ETA) if known and/or different from your set default.

12. Enter the guest's last name. If the guest has stayed in your hotel before, click the Magnifying Glass icon, and look up the guest's profile. When selected to copy, the guest's profile contact information automatically fills in the Reservation form.

    a. There is an option available in which AutoClerk will automatically redirect the user to the Guest Profile once the last name has been entered.

13. Enter the guest's Title if your property uses this feature.

    a. Even if you do not regularly use this field, it can be helpful if the guest has a gender neutral name, such as Pat or Terry.

14. If applicable, set the tax exempt rules for those guests who are not required to pay taxes. This way, taxes are not posted to their folio.

15. If applicable, set the bill-to. For example, this is when an inhouse guest or a reservation due to arrive on the same day plans to pay for this reservation.

16. Fill in the guest's address information.

    a. If you need more fields, click on the Details button and another window opens with additional address fields.

    b. If you use the additional fields, once you escape from the window, the button label will be in red, indicating there is additional address information.

17. If your property sends confirmation letters, either my mail or email, select the letter you want sent.

18. Set the pay type. Fill in the credit card information if applicable.

19. Confirm the guarantee type/cancel policy. These are set by rate class. If you need to change the configured settings, use the drop-down menu to change them.

20. Set the source code(s). The source codes are the ways that the guest found out about your hotel. For example, the guest was a walk-in, or the guest saw a newspaper advertisement.

    a. The number of source code fields used, the codes, and whether or not they are mandatory, are configurable by the property.

21. Add information to the Specials field related to special instructions as applicable.

22. Add Memo information as applicable or fill in the Note field.

    a. If you add something to the main Memo field, it will automatically copy to all memo fields.

    b. If you click on the Memo button, a new window opens, as shown in Figure 10 that allows you to enter separate memos for different purposes.

Figure 10: Memo fields

    i.   Housekeeping: Will show on the Housekeeping report.

   ii.   Telephone/F2: Will show when the uses accesses F2 once the guest is inhouse and will show on the inhouse Telephone list.

  iii.   Checkin Slip: If the Checkin slip has this field configured, it will be visible to the guest.

  iv.   Checkouts Due: Will show on the Checkouts Due report

   v.   Group Report: Will show on various group data exports.

  vi.   Note: This is a large note field which allows up to 2048 characters.

    vii. If you fill in one or several of these fields with different information, the Memo button label will be in red and 'Note fields are different from one another' appears on the Reservation form.

23. If there is travel agency information, enter it. If the travel agent has booked with you before, use the Magnifying Glass icon to find their profile and copy that information to the reservation.

24. Confirm the reservation information with the guest. If correct, click F10 at the bottom of the form or the + key on your computer keyboard.

25. Once you save the reservation, the Reservation Saved screen opens as shown in Figure 11.

Figure 11: Reservation Saved

1. You must see a confirmation number for a reservation to be in the system. Reservation confirmation numbers always start with the year in which they were created. You can now complete additional actions as necessary.

2. The additional actions are:

    i. Post Advance Deposit: Brings the user to the Post Advance Deposit form.

    ii. Print Confirmation Letter: Brings up a SendTo pipeline to email or print a Confirmation Letter

    iii. More: Expands the Print Confirmation Letter fields to allow the user to select a different letter.

      iv. New Reservation: Opens a blank New Reservation form

      v. Copy Reservation: Opens a New Reservation form with all of the previous reservation's data filled in.

         1. The guest's first name is appended by 'Copy'.

      vi. Esc: Brings the user back to the main menu.

Create Using an Existing Reservation

You might choose to use this feature if you are making a reservation for a guest who wants to reserve more than one room and the room types will be different. For example, two sisters traveling together might want to reserve a room for themselves as well as a room for their parents.

1. Select Create Using an Existing Reservation from the Reservations Main menu. The Reservation selection list opens.

2. Double-click on the reservation you wish to copy from. The selected reservation opens.

3. Make any necessary changes to the new reservation you are creating.

4. Verify the pay type as AutoClerk copies over the pay types information, even if it is a credit card.

5. Click F10 to save this as a new reservation.

Create Using a Folio

You might create a reservation using a folio if, for example, an inhouse guest needs a reservation for next week.

1. Select Create Using a Folio from the Reservations Main menu. The Select Folio box opens.

2. Select the inhouse guest's current room number from the pull-down menu.

3. Enter a Folio letter.

4. Click OK. The Reservation form opens with the fields completed.

5. Change any parameters such as arrival or departure date and room type.

6. Change the pay type information. You may have to re-enter this information, since you cannot copy credit card information from the folio to the new reservation.

7. Click F10 to save this new reservation.

Modify/View a Reservation

You will use this if you need to make changes to a reservation or if a guest calls and wants to confirm their reservation.

1. Select Modify/View a Reservation from the Reservations Main menu. A list of reservations opens. By default, only reservations with a Guaranteed, Hold,

Share-with, or Wait-list status appear. You can select or de-select to see other types of reservations by checking the appropriate boxes at the bottom of the screen.

2. Enter the last name of the guest in Search Last Name For field.

3. Double-click on the reservation you wish to modify. The guest reservation opens in the Mod Reservation form.

4. View or modify the reservation.

5. Click F10 Save to save your changes.

6. Once you save the reservation, an AutoClerk Confirmation window opens confirming your changes. You must see this window to confirm that your changes are in the system.

7. Click the OK button on the AutoClerk Confirmation window to return to the Main menu.

Groups

The following section contains information about the features and functions under the Groups command on the Reservation Main menu icon.

Create a New Group Master

Reservation Form

1. Select Groups from the Reservations Main menu.

2. Select Create a New Group Master from the Groups menu. The New Group Master form opens as shown in Figure 12. Any field with a blue label is a mandatory field.

Figure 12: New Group Master

3. The information you enter here will be copied to all individual group reservations. However, once saved, any changes will only be applied to new individual reservations, not any existing ones.

    a. You can also change any of the information when making individual group reservations, if necessary.

4. Set the arrival and departure dates.

    a. If you know that some guests will be arriving outside the main group and some will be departing after the group, you can enter those dates.

5. Enter the number of guests per room associated with the group. You can change this number when you make the group's individual reservations.

6. Enter the Estimated time of Arrival (ETA), if known.

7. Check cribs or roll away beds, if applicable.

8. Select the group master rate class.

   a. There is an option which will allow for the entry of two (2) group rate classes. One will be for the Master and the other for the individual reservations. Most properties only have one (1) Group Rate Class.

   b. If you have two (2) group rate classes, the 'Rate Class' is used for statistical purposes and will be visible on the Yield Report so a user can see what has not been picked up. The Guest Class will determine the reservation rates and will appear on the guest inhouse folio.

   c. Although a Group can have a package rate, it can ONLY be a one night package.

9. Group Cut-off is when you want any unbooked rooms to be released back to the house.

   a. Decide if you want the group to release unbooked rooms once on a determined date, or on a daily release basis.

   b. If you select Release Once, then you will need to enter the date that the rooms will be released.

   c. A Daily Release is also known as a rolling cut-off and is used for allotment or FIT reservations. The cut-off is determined by the number of days you enter in the Group Cut-off field. If you enter 7, AutoClerk, on the Night Audit, looks ahead 7 days and releases any unbooked rooms for that 8th day.

      i. As allotments are usually for a long period of time, say a 1 year contract, using a rolling cut-off lets AutoClerk manage when rooms are released back into the property's general availability instead of manually managing the inventory.

10. Enter the deposit needed per the group's contract.

    a. Once set, it makes all group individual reservations have the same 'Dep Needed' amount. It also make this amount the 'Dep Needed' amount when posting a deposit to the group master.

11. Set the cancel deadline. This is information that appears on reports only. (To cancel a group, you need to go to the Main menu Reservations→Groups→Cancel a Group.)

12. Enter a group name.

    a. When you tab out of the field, the Group name is copied into the Company field.

    b. If the group has stayed with the property before, click on the Details button, then on the magnifying glass to the right of the Company field.

        i.   You will be re-directed to Company Profiles where you can select the correct company.

        ii. By copying the information, you save time and insure the information is correct.

13. Enter the Group address information.

    a. If you click on the Details button, you can enter additional group contact information.

14. Enter Group Planner information by clicking on the Planner tab.

    a. This information is mandatory for a Best Western property or a property that has a CRS.

        i.   You can click on the Details button to enter additional contact information.

15. If applicable, set the tax exempt rules. This rule applies to the entire group. This way, taxes are not posted to any group members' folio.

16. If you have configured group confirmation letters, then select the letter(s) you want to send to the group and/or individual group reservations.

    a. The Guest Conf letter selection you make here will copy to any individual group reservation.

    b. If you do not have group confirmation letters, but are interested in getting them, please contact AutoClerk Support, (925) 284-1005, Option 2, during normal business hours.

17. Set the pay type. This can be a credit card, CL account or be left blank so the clerks will get the individual's form of guarantee as they make their own reservations.

18. Confirm the guarantee type/cancel policy.

    a. This is set by rate class and time period. If you need to change the settings, use the drop-down menu.

    b. If you are a BW property, there are specific guarantee types you must use for groups.

19. Set the source codes. The source codes are the ways that the group found out about your hotel. For example, the group saw a newspaper advertisement.

    a. The number of source codes fields used, the codes, and whether or not they are mandatory, are configurable by the property.

20. If your group is an allotment, then check the checkbox.

    a. An allotment is a contract to set aside a specific number of rooms each night, such as Expedia.

    b. By making a group as an Allotment, unused room revenue is NOT counted in the Yield Management Report.

21. Add information to the Specials field related to special instructions. Add Memo information as applicable or fill in the Note field.

    a. If you add something to the main Memo field, it will automatically copy to all memo fields.

    b. If you click on the Memo button, a new window opens, as shown in Figure 10 above that allows you to enter separate memos for different purposes.

        i. Housekeeping: Will show on the Housekeeping report.

        ii. Telephone/F2: Will show when the uses accesses F2 once the guest is inhouse and will show on the inhouse Telephone list.

        iii. Checkin Slip: If the Checkin slip has this field configured, it will be visible to the guest.

            1. You might want to put any specific billing information here so the guest sees it. An example would be that the guest is responsible for their own charges, or to direct bill room and tax only.

        iv. Checkouts Due: Will show on the Checkouts Due report.

        v. Group Report: Will show on various group data exports.

        vi. Note: This is a large note field which allows up to 2048 characters.

            1. If you put any special billing information here, it will be seen by the clerks at check in as well as check out.

        vii. If you fill in one or several of these fields with different information, the Memo button label will be in red and 'Note fields are different from one another' appears on the Reservation form.

22. If there is travel agency information, enter it. If the travel agent has booked with you before, use the Magnifying Glass icon to find the profile and add that information to the reservation.

23. Click F10 at the bottom of the form or the + key on your computer keyboard to save the group.

    a. Once you save the group, an AutoClerk Confirm window opens.

    b. Group Master Confirmation numbers always start with a letter.

Allocation and Rates Form

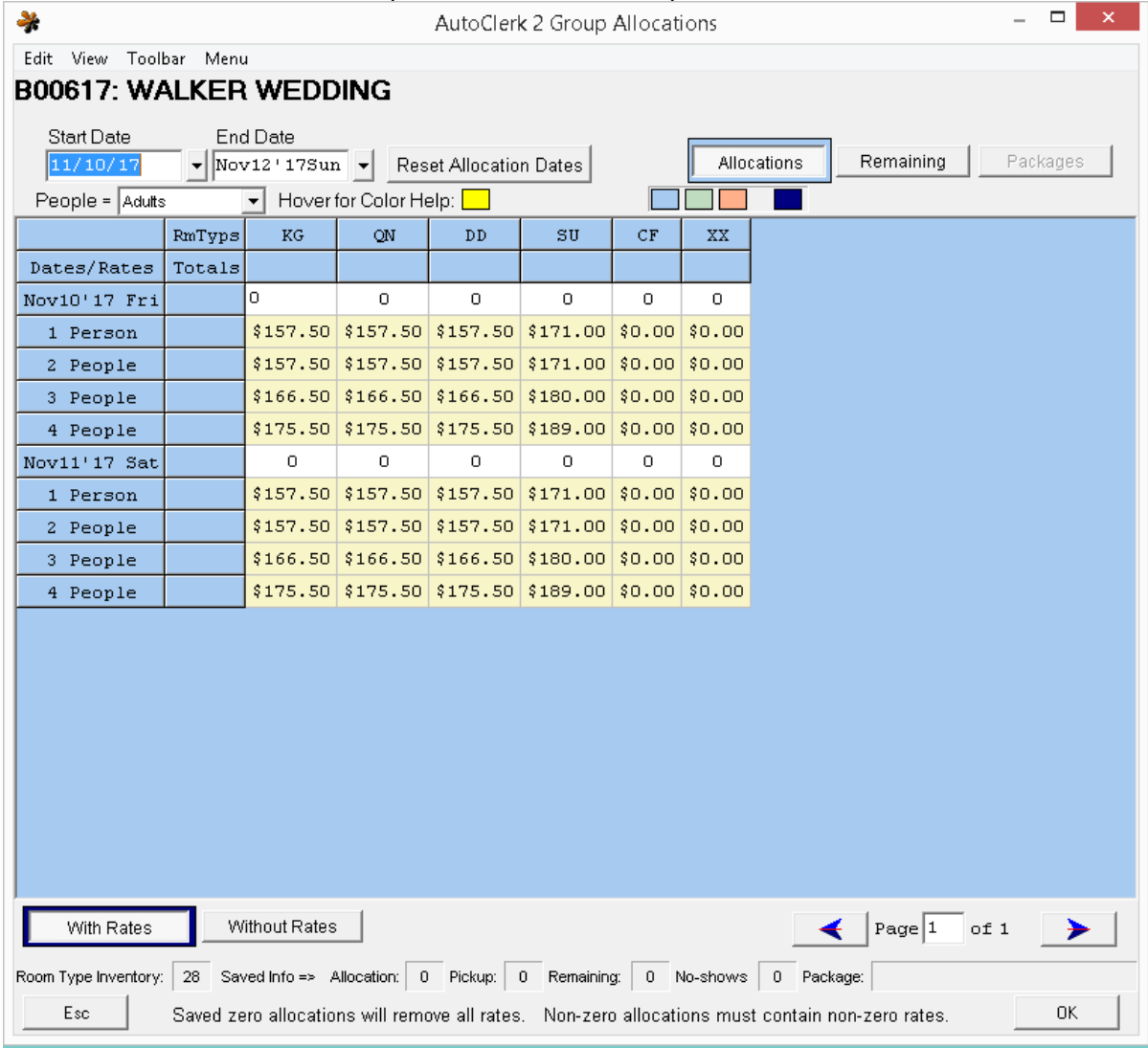1. Click the OK button. The Group Allocations screen opens as shown in
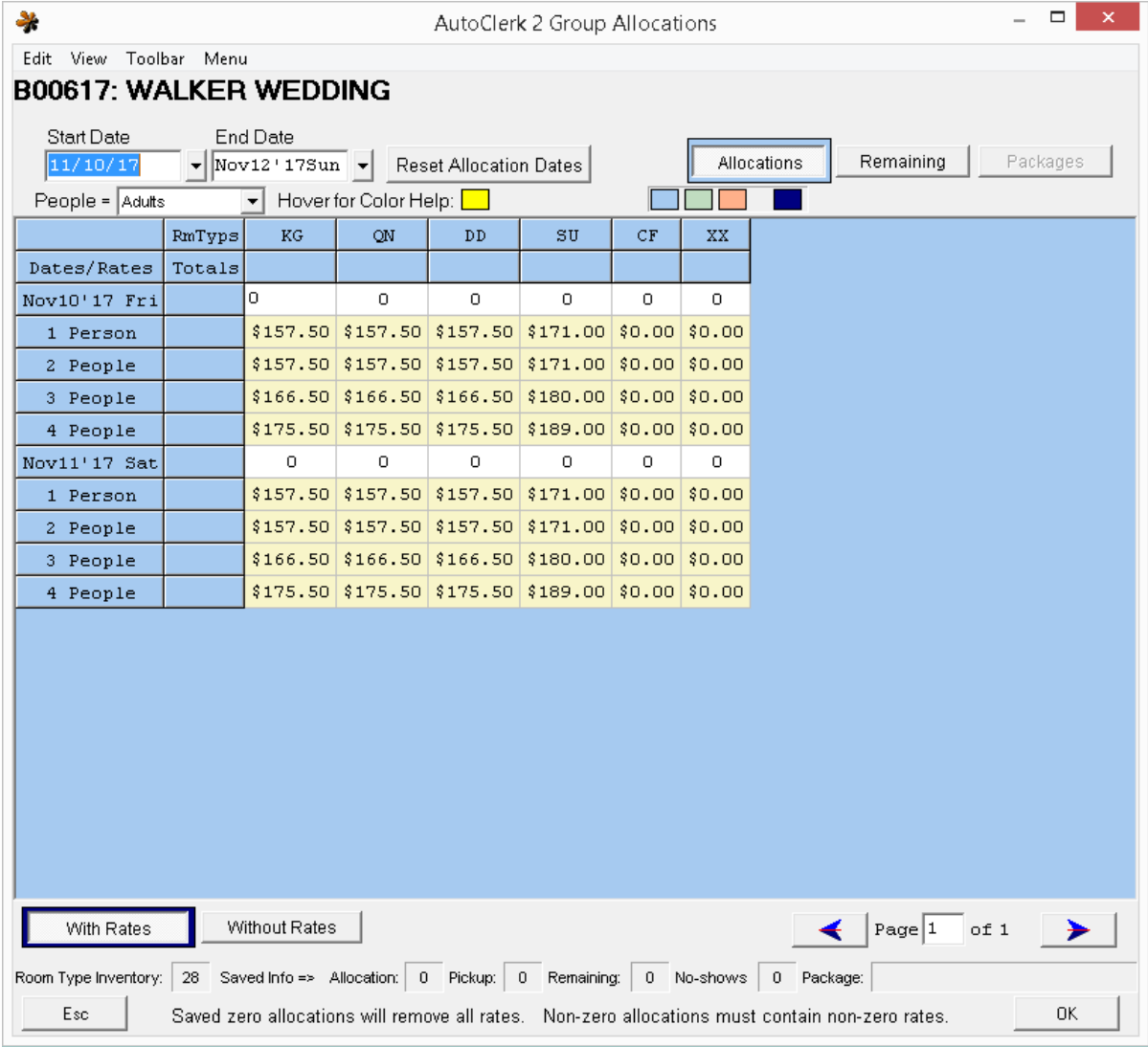

Figure 13.

Figure 13: Group Allocations and Rates

2. Title bar

    a. Edit: Set Multi Allocations and Set Multi Rates allow you to set/change allocations and/or rates quickly.

    b. View: Allows you to change the view for that one time viewing. This can be helpful if you have a lot of room types and only a few allocated for the group.

        i. If the group rate is a package, when the user clicks on the Package button, he will see menu items to see just the Room Amount or the Total Package Amount.

c. Toolbar: Another way to access the Function keys. Although they are not visible, you can also just press the keyboard keys to access them. For example, F4 for availability.

d. Menu: Open another AutoClerk session.

3. Start/End Date; Reset Allocation Dates: Use these fields and button if you want to add in shoulder dates for the group.

4. Allocations/Remaining/Packages: Click the first two (2) to change the view of allocations. Once you have reservations for the group, you can use them to quickly see how many rooms have been booked vs. remaining.

   a. The Packages button is only enabled if the group's rate class is a package.

5. People =: This is set in ACConfig but can be changed on a group by group basis. This determines the rates that are shown. The amounts will depend on how your rates are set up, i.e. if you charge for extra adults and/or children.

6. With/Without Rates: Clicking these buttons changes the display. It can be helpful if your group is for a lot of days and you want to set/change allocations without having to see all the rate rows.

7. Hover for Color: If you are not sure the parameters of the form you are looking at, hover your mouse over a color cell and the description will pop-up.

8. Room Type Inventory: This line details the room inventory of the group. How many allocated, picked up, remaining. For past groups, it will include no show reservations. If the rate is a package, then the package name will be displayed.

Setting Room Type Allocations and Rates

1. You can set the number of rooms allocated for each room type in several ways:

   a. You can click in the cell for each room type for each day and enter in the number of rooms allocated.

      i. If your group is for several days, if you click the Without Rates button at the bottom, the rates will not be displayed, making it easier to move from cell to cell, setting the allocation.

   b. For groups staying for multiple nights and using one or multiple room types, click on Edit on the top menu bar.

      i. Select Set Multi-Allocations. The Multi-Edit window appears as shown in Figure 14.
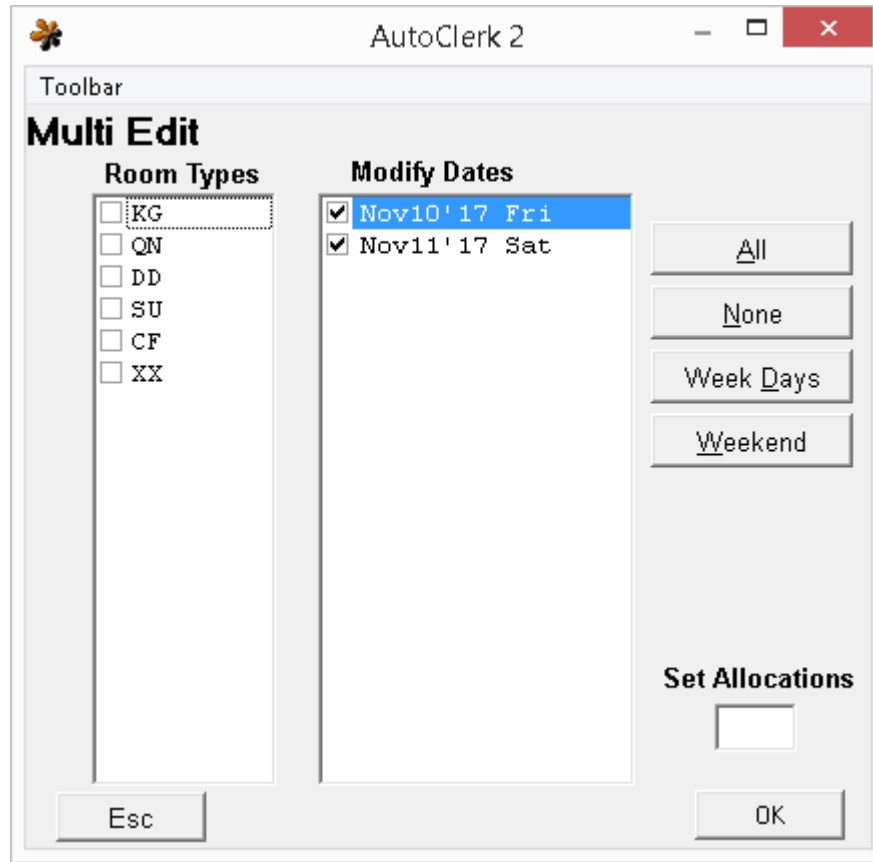
Figure 14: Set Multi Allocations

    ii. In the Room Types column, select the checkboxes for the room types that will have the same number of allocations.

        1. If you are unsure what is available, F4 on the keyboard to see room availability. You will need to change the dates for the group's dates.

    iii. In the Modify Dates column, the group's dates are listed and pre-checked. Use the All, None, Week Days, and Weekend buttons to set allocations for specific days in the group. Otherwise, you can use the dates that are already checked off by default.

    iv. Enter the number of rooms in the Set Allocations field.

    v. Click the OK button and you are returned to the Group Allocations screen.

    vi. Repeat these steps until your allocations are complete.

2. The rates shown are the configured rates for the set rate class. If you are using two (2) group rate classes, the rates are pulled from the guest Rate class. If these rates are correct, click ok.

a. Otherwise, you can set the rates in several ways:

i. Click in the rate cell for each day, room type and number of persons and set the rate.

ii. A faster way is to select Edit from the title bar.

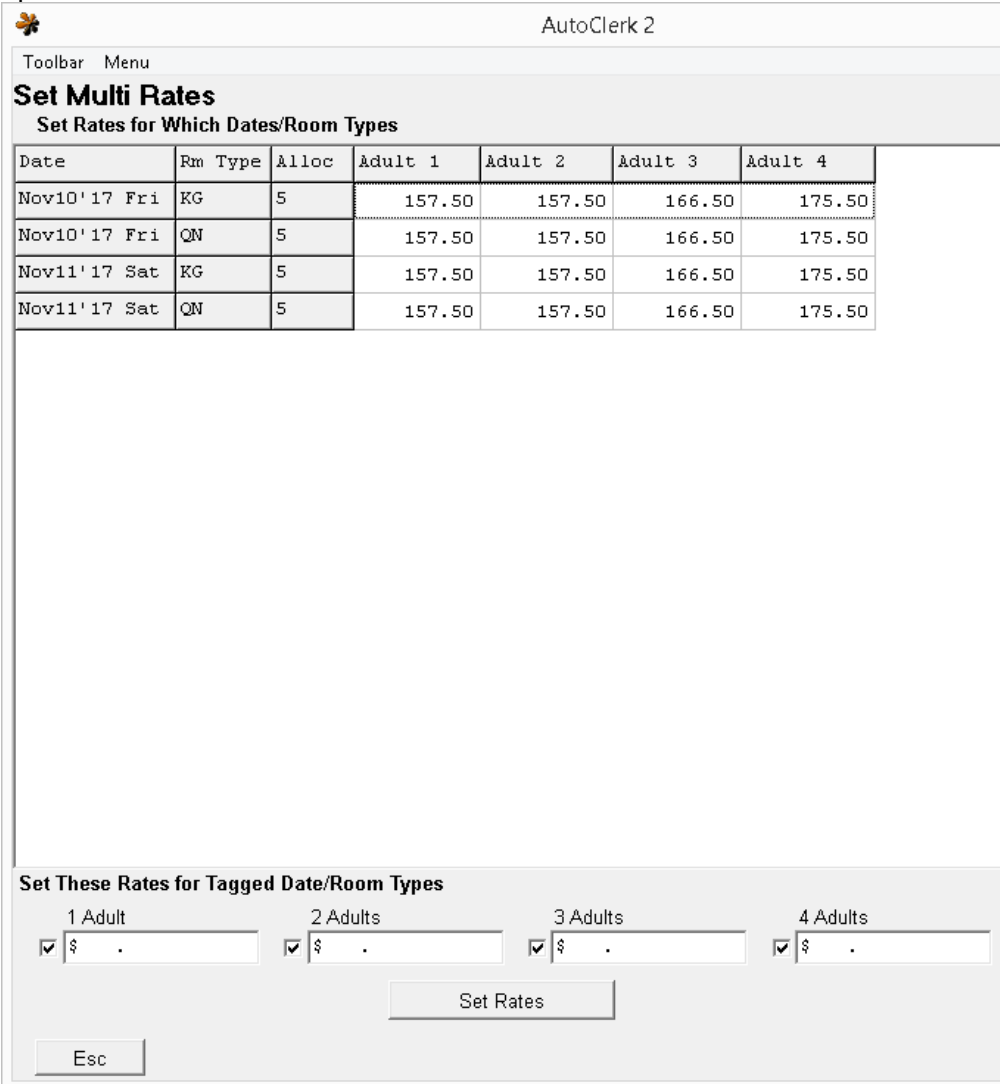1. Select Set Multi-Rates and the Set Multi Rates window opens as shown in

Figure 15.

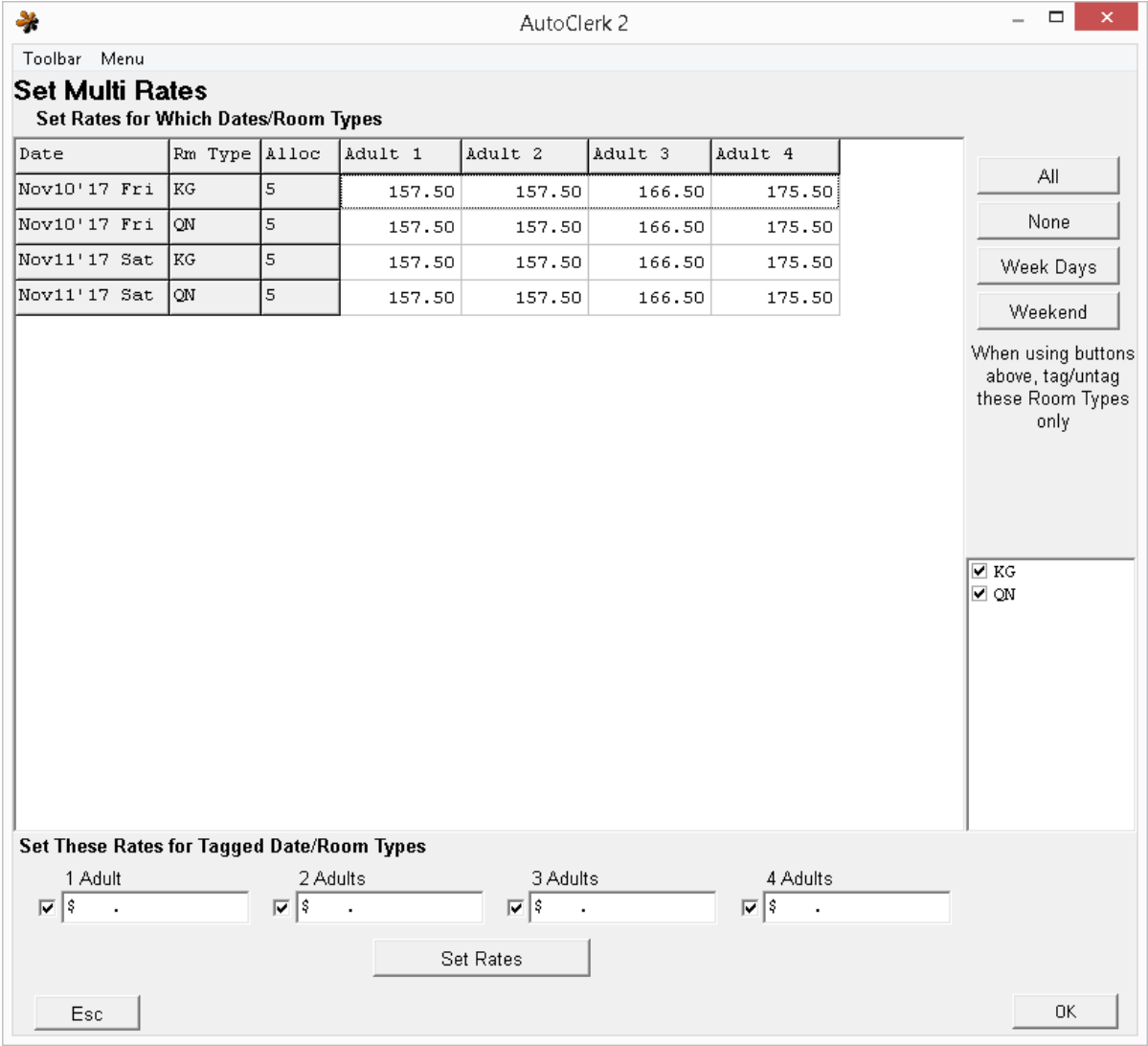2. The grid is organized by date and the room type(s) with allocations.

Figure 15: Set Multi Rates

iii. You can select the room type(s) you want to set rates for by:

1. Clicking the Rm Type cell. This will highlight that room type's row. However, you will need to do this for each date/room type that will be the same.

2. Using the listed room types on the right side, uncheck (untag) the room type(s) that you do not want to set.

   a. Use the buttons above the box to select the dates.

b. For example, if you uncheck QN and then click All, then all days of the KG room type will be highlighted and you can set the rates for that room type.

3. If all the room types will have the same rate, click the All button. This will highlight all the days and room types.

iv. On the bottom of the form, enter a dollar amount in the 4 Adult fields, depending on how many adults are occupying a room.

v. Click the Set Rates button.

vi. Your new rates appear in the cells.

vii. Click the OK button. The Group Allocations window reappears.

3. Click the OK button. The AutoClerk Confirm window appears confirming the group allocations and rates. Click the OK button and you are returned to the Main menu

Modify/View a Group Master

1. Select Groups from the Reservations Main menu.

2. Select Modify/View a Group Master from the Groups menu. The Modify a Group Master window opens.

   a. By default, only active Groups are listed. However, you can search Cancelled and/or Expired Groups by checking the boxes at the bottom of the screen.

   b. You can change the order of the list by clicking on Order on the Tool bar and changing the order.

   c. If you highlight a group, then click on the Confirmation Letter button, you can print/display/email both a confirmation letter as well as a room list for the group.

      i. You must a group confirmation letter defined to use this function.

3. Enter the group name in the Search Group Name For field.

   a. You can also double-click on the Group Master you wish to view or modify.

   b. The Mod Group Master window opens.

4. Change the necessary or applicable information such as arrival and departure dates or new contact info.

   a. Click the OK button. The AutoClerk Confirm window appears confirming your group changes.

5. Click the OK button. The Group Allocations screen opens.

   a. If you are prompted for a groups overbooking password, enter the code or ask your manager.

6. If you do not need to make any changes, to the group's allocations and/or rates, click on Esc to go back to the Main Menu.

7. If you need to make changes to the room type allocations and/or rates, follow the steps in the previous "Create a New Group Master" section.

Modify Group Allocations/ Rates Only

1. Select this menu item if you just need to modify a group's rates and/or allocations and do not need to modify the master.

2. Select Groups from the Reservations Main menu.

    a. Select Modify Group Allocation Rates Only. The Modify Group Allocations window opens.

        i. If it does not appear, and you are prompted for a groups overbooking password, enter the code or ask your manager.

3. Enter the group name in the Search Group Name For field.

    a. By default, only active Groups are listed. However, you can search Cancelled and/or Expired Groups by checking the boxes at the bottom.

    b. You can change the order of the list by clicking on Order on the Tool bar and changing the order.

4. Double-click on the Group Master you wish to make changes. The Group Allocations screen opens as shown in
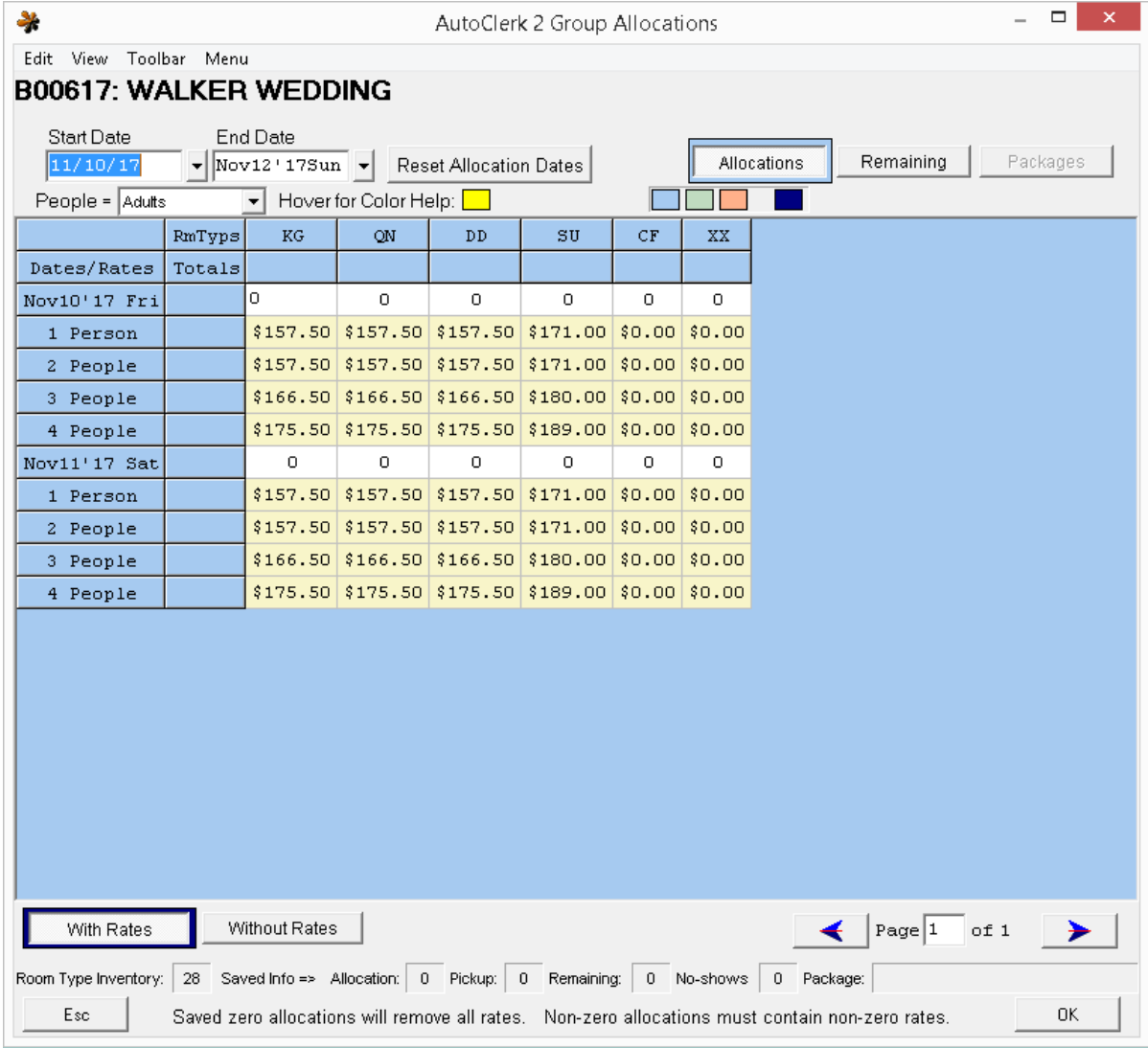
Figure 13 above.

5. If you do not need to make any changes, you can click on Esc and to go back to the Main Menu.

6. If you need to make changes to the group's allocations and/or rates, follow the steps in the above section under Setting Allocations and Rates.

7. Click the OK button. The AutoClerk Confirm window appears confirming your group allocations updates. Click the OK button to return to the Main menu.

Release Group

1. Use this if you want to Release a group's allocations outside of the date set on the master.

2. When you select this menu option, you are brought to the Group Selection screen.

   a. If you have a group access code, you will be asked to enter it prior to being re-directed to the selection screen.

3. Double click on the group you want to work on. You are presented with the Group Allocations Release form as seen in Figure 16.
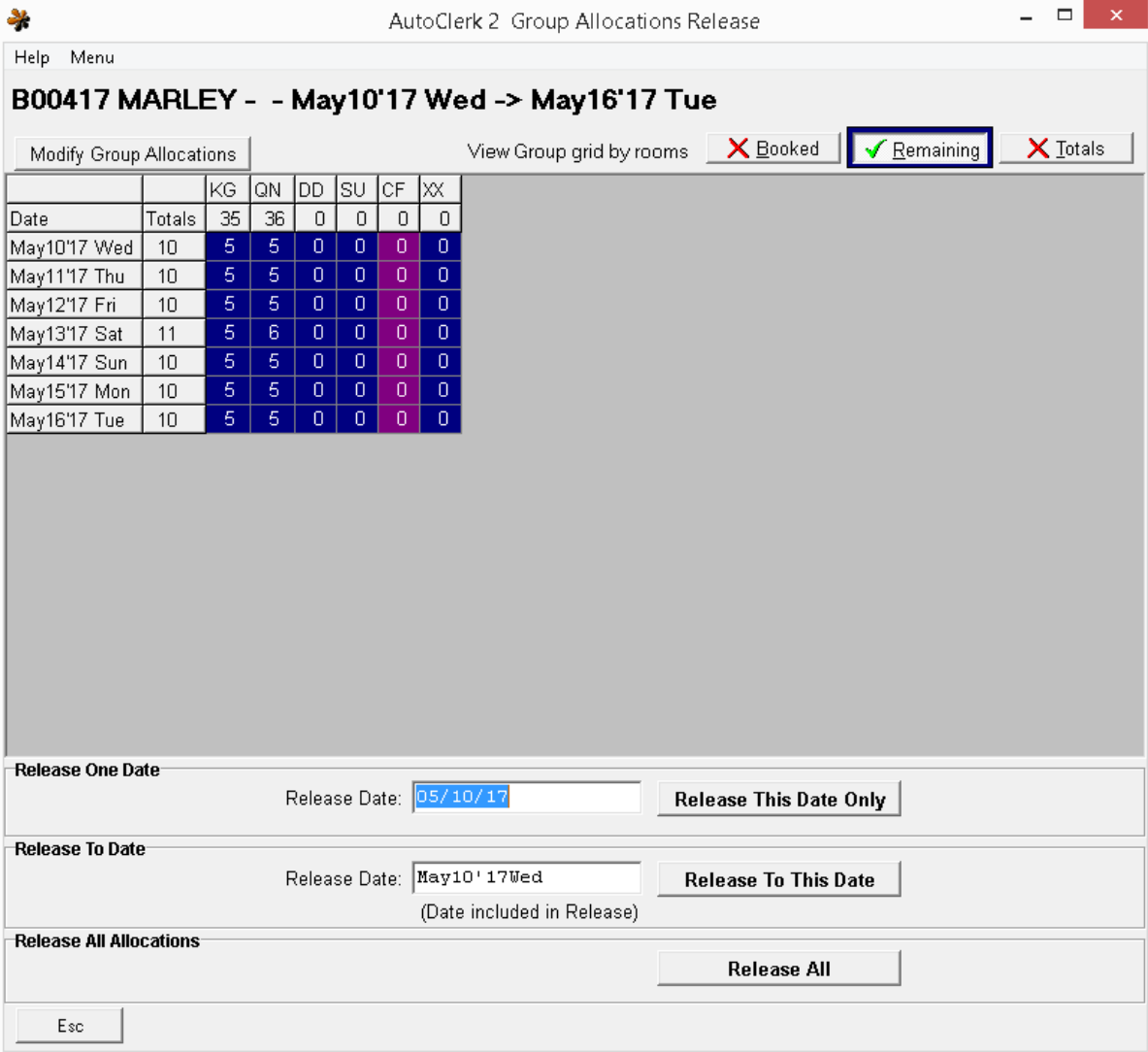

Figure 16: Group Allocations Release

4. Select the Release option you want to use

   a. Regardless of the selection you pick, ALL allocated rooms will be released. You do NOT get to select the specific room type(s) to be released.

      i. If you want to release specific room type(s), go through either Modify a Group Master or Group Room Management.

Group Room Management

This is a multi-faceted function which allows the user to manage a group's reservations including: adding, modifying, and cancelling; setting up bill-to; checking in and checking out; as well as modifying a group's allocations and/or rates.

1. Select Groups from the Reservations Main menu.

2. Select Group Room Management. The Group Selection list opens.

3. Enter the group name in the Search Group Name For field.

    a. By default, only active Groups are listed. However, you can search Cancelled and/or Expired Groups by checking the boxes at the bottom.

    b. You can change the order of the list by clicking on Order on the Tool bar and changing the order.

4. Double-click on the group you wish to manage. The Group Room Management screen opens as shown in Figure 17.

Figure 17: Initial Group Room Management Form

Title Bar

1. File

    a. Set Design as Default: If you have changed the parameters of the screen, in regards to which columns to show, etc. you can set that as the default for all groups.

    b. Reset Defaults: If you have made changes and made that the default but now want to go back to the original layout, click this.

        i. You will need to reload the form to see the changes.

    c. Print: Produces a report showing the group's reservations and the remaining room type allocations.

    d. Print Group Letter: Produces the Group Confirmation letter. The letter it uses is based on the entries in the Group Master. Also, you must have group confirmation letters set up.

        i. This is NOT the letter that goes out to individual group members.

        ii. If you are interested in setting up Group Confirmation letters, contact AutoClerk Support (925) 284-1005, Option 2.

    e. Print Group Allocations: Produces a Group Allocations Report which shows on a day-by-day basis, the pickups and allocations for the group's room types.

    f. Exit Closes the form and returns you to the AutoClerk main menu.

2. Edit

    a. How to Import CSV Rooming List: Instructions on how to import an existing rooming list that is in .csv format.

    b. Import CSV Rooming List: Allows you to import a .csv group rooming list into AutoClerk.

3. View

    a. The items/parameters listed here can be checked/unchecked to change the view of the form. Checked items will be shown.

        i. If after making changes to set the form as you want, you can set that as the default through File – Set Design as Default

    b. Show Cancelled Reservations: Check by default to show the group's cancelled reservations.

    c. Show Checked-in Reservations: Checked by default to show the group's checked in reservations.

    d. Show Checked-out Reservations: Checked by default to show the group's checked out reservations.

    e. Visible Columns: These are the columns in the bottom portion of the form, as pertain to group individual reservations.

    f. Show Group Grid: The Group grid is the top section of the form which shows the group's dates and room type allocations.

    g. Refresh: Refreshes the form with any changes you have made.

4. Letters: Depending on the status of a reservation, the user can click on a reservation, then click here to send various letters or print a check in slip.

    a. You must have the letters set up in order to send them.

        i. The letters sent also depend on the setting for Guest letters in the Group master.

    b. The user can also print out check in slips for all group members.

       i. When this option is selected, a window appears asking the user to choose Today's Arrivals or All Dates.

5. Bill-to:

    a. Master Bill-to Setup: Allows the user to Set up a Master Bill-to.

       i. Before using this, you have to have an individual reservation to act as the master. This reservation can be one of the group's guests or a share-with. Some properties will create a reservation for a non-sleeping room type and use that as the bill-to master.

      ii. Once you have a master reservation, click on Bill-to – Master Bill-to Setup. The Bill-To Folio Charges form opens as show in Figure 18.
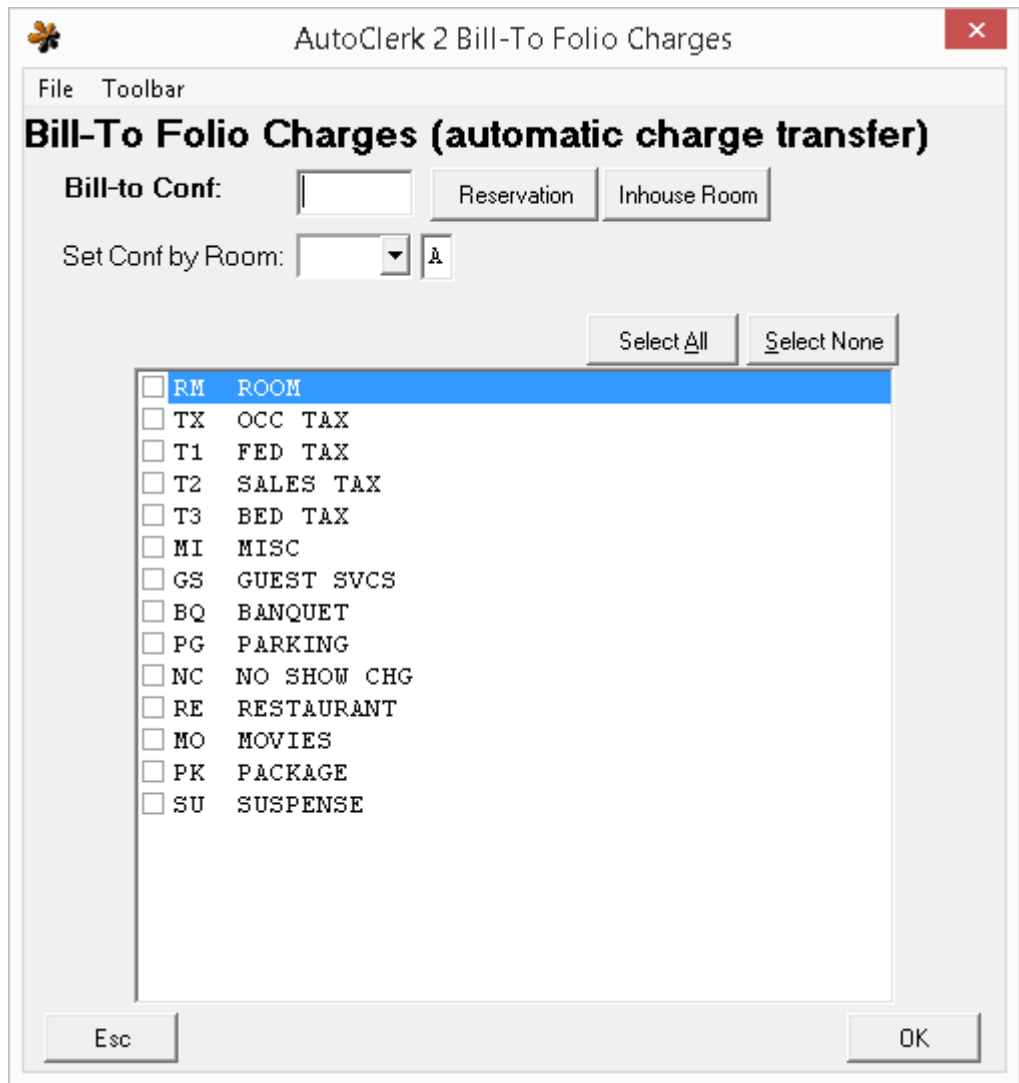

Figure 18: Group Bill-to Setup

       iii. Enter in the confirmation number of the master reservation. You should be able to see it on the screen behind the set-up form. If not, you can click on the Reservation or Inhouse Room button to search.

1. When you click on either of the buttons, you will be redirected to a selection screen or drop down to make your selection. The reservation list will only contain the guests due to arrive on the group's arrival date. You can use the arrow buttons to change the date.

2. If the guest is already inhouse, you can also enter the room number and folio.

3. Once the selection is made, the guest's name and arrival date appears

       iv. Check the checkboxes next to the transaction type you want to be billed to the master.

1. You can also use the Select All and Select None buttons.

       v. Once completed, click the OK button. You are returned to the Group Room Management form.

1. The Group Master Bill-To Setup button is now in red, indicating a bill-to is set up.

2. All future group reservations will automatically include the bill-to set-up.

       vi. If you set up a master bill-to after any reservations have been made or guests have checked in, use the Update Bill-to over Inhouse and/or Update Bill-to over Reservations menu items to update the records, if applicable.

1. Applying a Bill-to set-up erases any existing bill-to that may be on a reservation or inhouse folio.

6. Toolbar: Allows the user to use the Function keys (F-keys).

    a. Although the Function keys do not appear at the bottom of the form, the user can also press the keyboard keys to use them.

7. Menu: Opens another instance of AutoClerk.

Form buttons

1. Modify Group Allocations: Redirects the user back to the Group Allocation form so they can make changes if necessary.

    a. If you are prompted for a groups overbooking password, enter the code or ask your manager.

2. View Group grid by rooms Booked; Remaining; Total: The default view is to see Remaining so that the user knows how many rooms remain for the group.

        a. As you click on the buttons, the group grid changes.

3. Group Master Bill-to Setup. See the section above, as this button brings up the same forms, etc.

Reservations

1. There are two ways to enter a reservation:

   a. If you receive a rooming list from the group, or just want to quickly enter in reservations, use the Simple format the bottom of the screen.

      i. The Arrival and Departure dates are taken from the Group Master. Change them if necessary.

      ii. When you click on the down arrow in the Rm Type field, you get a list of allocated room types from which you can choose. Select a room type.

      iii. If you are assigning rooms at this time, click on the down arrow in the Room field and select a room.

      iv. The number of People is taken from the Group Master. Change them if necessary.

      v. Click on the Rates & Taxes button if you want to know what they will be.

      vi. Enter the guest's Last and First Name.

      vii. If the guest is reserving multiple rooms under their name, change the number in Rooms, up to 9. The default is 1 room.

      viii. When complete, click the Add Res button. Click OK on the Confirmation pop-up.

         1. The reservation appears in the window above.

         2. The form at the bottom has retained the previously entered information so you can enter another reservation without having to change a lot of information.

   b. The second way to enter in group individual reservations is to click on the Add Res Full button. This is usually used when the group's members are responsible for their own charges.

      i. A full reservation screen appears with the Arrival date, Departure date, People and the Group's contact information already filled in.

      ii. Add and change information as necessary. This usually includes the guest name, address and pay type information.

      iii. When complete, click the F10 (Save) button.

         1. The Reservation Saved screen appears. If you do not need to post an advance deposit, print a confirmation letter and/or create additional reservations, click on the Esc button.

2. You are returned to the main Group Room Management screen with the reservation you just made in the rooming list in the middle of the screen

c. All reservations, regardless of status, are listed in the window as soon as they are saved. An example is shown in Figure 19.
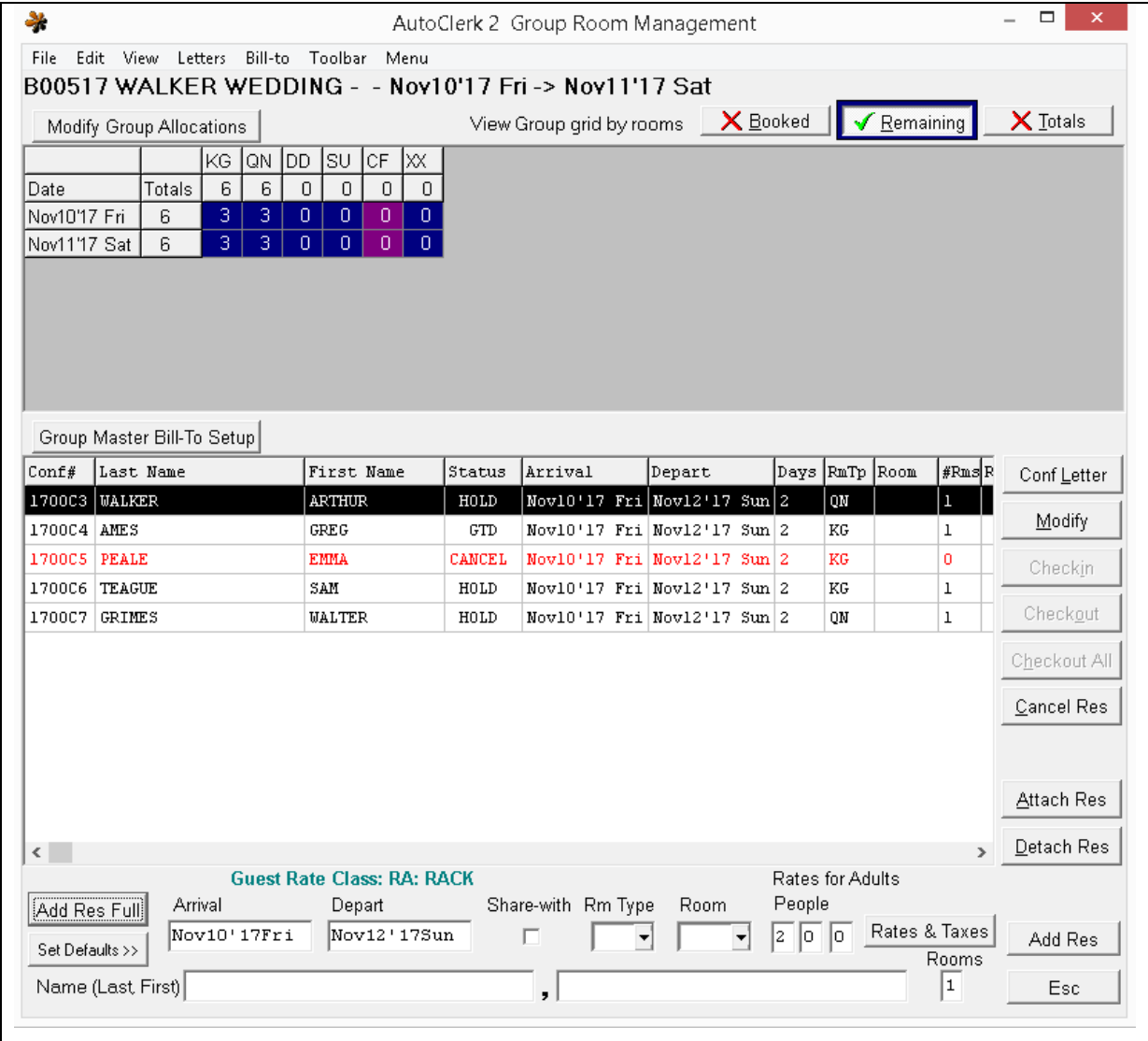

Figure 19: Group Room Management Form

i. The individual reservations remain in the Group Room Management screen until the group is checked out.

ii. The buttons on the right are enabled once you have entered reservations. For most of the buttons, highlight the reservation you want to perform the function on, then click the button.

1. Conf Letter: Presents you with a SendTo menu to send a Confirmation letter. The letter sent depends on the selection either in the group master or the individual reservation.

2. Modify: Redirects you to the selected reservation form to make modifications.

   a. You can also get to the form by double-clicking on the reservation in the list.

3. Checkin: This is only enabled on the date of arrival. Clicking on it redirects you to the Check in a Guest with a Reservation form.

4. Checkout: Once a guest is inhouse, this button is enabled.

   a. A guest must have a zero balance to be checked out. You will get a warning if the folio is not $0.00. If the balance is not $0.00, you will need to escape out to the main menu and check the guest out through the Checkout form.

5. Checkout All: Checks out all guest folios with a $0.00 balance.

   a. When you click this, you need to confirm if you want to check out all group guests or just the ones Due Out the current day.

   b. Once you have confirmed, AutoClerk will checkout the folios and present you with a list of which folios were and were not checked out.

6. Cancel Res: Allows you to cancel a group reservation. When the cancellation is complete, you are asked if you want to return the room to the group allocation.

   a. Answer yes if you want the room to go back to the group for another guest to book.

   b. Answer no if the group's cutoff or cancellation date has passed and the room goes back to the house for any guest to book.

7. Attach Res: Use this if a guest made a reservation and then informed you he was part of the group.

   a. When you click on the button, you are re-directed to a reservation selection page listing the reservations due to check in the arrival date of the group.

b. Highlight the reservation you want to attach and click OK.

   i. If there are any issues with the reservation, you will get a pop up to confirm. An example would be a non-allocated room type and/or date(s) outside the group block.

8. Detach Res: Use this to move a guest from one group to another, or to simply remove a guest from a group.

   i. Highlight the reservation you wish to detach and click OK. You are prompted to confirm your selection.

   ii. When you detach a reservation. The room type allocation is automatically added back to the group. You may need to adjust the allocation if the reservation had dates outside the main group.

Post an Advance Deposit to a Master

1. Select Groups from the Reservations Main menu.

2. Select Post an Advance Deposit to a Master from the Groups menu. The Post Deposit list of groups opens.

3. Enter the group name in the Search Group Name For field.

   a. You can also double-click on a group. The Post Advance Deposit to Reservation form opens.

4. At the bottom of the form, confirm the Pay Type. It will default to the pay type on the Group Master reservation.

   a. In the Amount field, enter the amount of the deposit. If you entered a Deposit Needed amount on the Group Master, that amount appears.

   b. In the TA Withheld field, enter an amount of the travel agent commission if the deposit has deducted the commission. (This is uncommon.)

   c. Click the OK button. An AutoClerk Confirm window opens to confirm your deposit. If you do not see this window, your deposit is not in the system.

5. Click the OK button. Another AutoClerk Confirm window appears confirming a Share-With reservation has been made for this group and the deposit attached to it.

   a. The name on the Share-with reservation is [Group Name], DEPOSIT.

6. Click the OK button. The Main menu reappears.

Cancel a Group

Before cancelling a Group, you should confirm that there are no Advance Deposits either on the group Master or on any of the individual reservations. If there are any deposits, they should be addressed before cancelling the Group.

1. Select Groups from the Reservations Main menu.

2. Select Cancel a Group from the Groups menu. The Cancel Group Master list of groups appears.

3. Enter the group name in the Search Group Name For field.

4. Double-click on a group master you wish to cancel. An AutoClerk Confirm box opens to confirm that you are sure you want to cancel the group you selected.

    a. If there are any group reservations that have advance deposits on them, the form includes a warning of that fact.

5. Click Yes if you want to cancel that group and all attached reservations.

    a. An AutoClerk Confirm box opens confirming the group you just canceled followed by a cancellation number.

    b. You also have the opportunity to send out a Cancellation letter, if one is configured.

6. Click the OK button. An AutoClerk Confirm box opens and prompts you to cancel another if you wish.

7. Click No to return to the Main menu.

Reinstate a Canceled Group

1. Use this feature if a group wants to re-instate their booking.

2. When you use this, the group master and ALL its reservations are re-instated.

    a. If a group reservation is cancelled and within the next 3 minutes the group is cancelled and then reinstated, that cancelled reservation is also reinstated as active and NOT cancelled.

Customer Rooming List

1. Select Groups from the Reservations Main menu.

2. Select Customer Rooming List from the Groups menu. The Group Rooming List Report selection list opens.

3. Enter the group name in the Search Group Name For field.

    a. You can also double-click on the group for which you want rooming details. The SendTo screen opens.

4. Click the Display button to see the Group Rooming List. An example is shown in Figure 20.

Figure 20: Group Rooming List

List Groups Due to Arrive

1. Select Groups from the Reservations Main menu.

2. Select List Groups Due to Arrive from the Groups menu. The Group Report Parameters box opens.

3. Enter the group date range parameters. The default is for the next 30 days.

4. You may choose to include the room type detail. This is a breakdown of the individual room types allocated for a specific group. The default for this option is unchecked.

5. Click the OK button. The Groups Due to Arrive screen opens with a list of groups that fall within the date range you selected as shown in Figure 21.

Figure 21: Groups Due to Arrive

      a. If you included Room Type Detail, there would be additional columns to the right of the Pickup Revenue column.

          i. There is a column for each room type with allocations.

          ii. The columns report the number of rooms Allocated and Picked up.

6. You can use the Print and Browse buttons to view or print the information.

7. Click the OK button on the Groups Due to Arrive screen.

Future Inhouse Guest

This report can be used to view who is expected to be inhouse on a specific day. This is useful for researching Unused Group Rooms on the Forecast Report.

1. Select Groups from the Reservations Main menu.

2. Select Future Inhouse Guest from the Groups menu. The Future Inhouse Guests box opens as shown in Figure 22.

Figure 22: Future Inhouse Guests

3. Select the parameters you wish to appear in the report by checking the associated checkbox.

4. Click the OK button. The SendTo menu opens.

5. Select the mode in which you wish to see the report.

Group Pickup Report

This report gives you information on rooms picked up and revenue for groups past and future.

1. Select Groups from the Reservations Main menu.

2. Select Group Pickup Report from the Groups menu. The Group Pickup Report Parameters box opens as shown in.

Figure 23: Group Pickup Report Parameters

3. Set the parameters you wish to use to generate the report:

   a. If you select a single group, you can enter the Group Confirmation number, if you know it, or click on the Browse button and select the group from the list of Group Masters.

   b. Checking the Unused box produces a report, which includes picked up and non-picked up rooms

   c. Checking the Include Detail box produces a report, which includes information on each reservation that is part of a group. If the guest has already checked out, the Detail includes the room type, amount of tax, room number and the daily room rate. If the guest has not yet checked in, the Detail includes the room type, reservation status, confirmation number and daily room rate.

4. Click OK, and the SendTo screen appears.

   a. Select the way you wish to display/print the report.

5. Below are examples of some of the variances of the report.

Conf	Group Name	Date		KG		QN		Total		ADR
			Units	Revenue	Units	Revenue	Units	Revenue	
B00617	WELLS	Jul 9'17 Sun	0	$0.00	2	$370.00	2	$370.00	$185.00
	Total	Jul 9'17 Sun	0	$0.00	2	$370.00	2	$370.00	$185.00
B00517	WALKER WEDDING	Nov10'17 Fri	3	$472.50	2	$324.00	5	$796.50	$159.30
	Total	Nov10'17 Fri	3	$472.50	2	$324.00	5	$796.50	$159.30
B00517	WALKER WEDDING	Nov11'17 Sat	3	$472.50	2	$324.00	5	$796.50	$159.30
	Total	Nov11'17 Sat	3	$472.50	2	$324.00	5	$796.50	$159.30
	Grand Total		6	$945.00	6	$1018.00	12	$1963.00	$163.58

Figure 24: Group Pickup Report – Multiple Groups

a. Figure 24 shows the report for multiple groups and without including unused or detail. If detail had been included, then there would be a line for each reservation for each group, along with that reservation's potential revenue data.

Conf	Group Name	Date		KG		QN		* CF *		Total		ADR
				Units	Revenue	Units	Revenue	Units	Revenue	Units	Revenue	
B00M14	AAC3075	Sep 5'14 Fri	Pickup	3	$200.00	1	$200.00	1	$0.00	4	$400.00	$100.00
	Tr 67 Rm106						$100.00					
	Tr 73 Rm109				$100.00							
	Tr 79 Rm112				$100.00							
	Tr 94 Rm223						$100.00					
	Tr 98 Rm300								$0.00			
	Total	Sep 5'14 Fri	Pickup	3	$200.00	1	$200.00	1	$0.00	4	$400.00	$100.00
B00M14	AAC3075	Sep 6'14 Sat	Pickup	1	$100.00	1	$100.00	1	$0.00	2	$200.00	$100.00
	Tr 28 Rm112				$100.00							
	Tr 43 Rm223						$100.00					
	Tr 47 Rm300								$0.00			
	Total	Sep 6'14 Sat	Pickup	1	$100.00	1	$100.00	1	$0.00	2	$200.00	$100.00
	Grand Total		Pickup	4	$300.00	2	$300.00	2	$0.00	6	$600.00	$100.00

Figure 25: Group Pickup Report – Past Group

b. Figure 25 shows the report for one group that has come and gone. It includes unused and detail. It is broken out by the days the group was inhouse, and includes the inhouse guest information and revenue received.

Conf	Group Name	Date		KG		QN		Total		ADR
				Units	Revenue	Units	Revenue	Units	Revenue	
B00517	WALKER WEDDING	Nov10'17 Fri	Pickup	3	$472.50	2	$324.00	5	$796.50	$159.30
		Nov10'17 Fri	Unused	2	$315.00	3	$472.50	5	$787.50	
		Nov10'17 Fri	All	5	$787.50	5	$796.50	10	$1584.00	
	R 1700C3						$166.50			
	R 1700C4				$157.50					
	R 1700C6				$157.50					
	R 1700C7						$157.50			
	R 1700CB				$0.00					
	R 1700CC				$157.50					
	Total	Nov10'17 Fri	Pickup	3	$472.50	2	$324.00	5	$796.50	$159.30
	Total	Nov10'17 Fri	Unused	2	$315.00	3	$472.50	5	$787.50	
	Total	Nov10'17 Fri	All	5	$787.50	5	$796.50	10	$1584.00	
B00517	WALKER WEDDING	Nov11'17 Sat	Pickup	3	$472.50	2	$324.00	5	$796.50	$159.30
		Nov11'17 Sat	Unused	2	$315.00	3	$472.50	5	$787.50	
		Nov11'17 Sat	All	5	$787.50	5	$796.50	10	$1584.00	
	R 1700C3						$166.50			
	R 1700C4				$157.50					
	R 1700C6				$157.50					
	R 1700C7						$157.50			
	R 1700CB				$0.00					
	R 1700CC				$157.50					
	Total	Nov11'17 Sat	Pickup	3	$472.50	2	$324.00	5	$796.50	$159.30
	Total	Nov11'17 Sat	Unused	2	$315.00	3	$472.50	5	$787.50	
	Total	Nov11'17 Sat	All	5	$787.50	5	$796.50	10	$1584.00	
B00517	WALKER WEDDING	Nov12'17 Sun	Pickup	0	$0.00	0	$0.00	0	$0.00	$0.00
		Nov12'17 Sun	Unused	0	$0.00	1	$0.00	1	$0.00	
		Nov12'17 Sun	All	0	$0.00	1	$0.00	1	$0.00	
	Total	Nov12'17 Sun	Pickup	0	$0.00	0	$0.00	0	$0.00	$0.00
	Total	Nov12'17 Sun	Unused	0	$0.00	1	$0.00	1	$0.00	
	Total	Nov12'17 Sun	All	0	$0.00	1	$0.00	1	$0.00	
	Grand Total		Pickup	6	$945.00	4	$648.00	10	$1593.00	$159.30
	Grand Total		Unused	4	$630.00	7	$945.00	11	$1575.00	
	Grand Total		All	10	$1575.00	11	$1593.00	21	$3168.00	

Figure 26: Group Pickup Report – Future Group

c. Figure 26 shows a single group due to arrive and including Unused and Detail. Similar to the previous Figure, each day of the group has a section, each reservation is listed along with the potential revenue.

Create a Permanent Reservation

You can use this function if you want to set up a template reservation. This can be useful for corporate accounts.

1. Select Create Permanent Reservation from the Reservations Main menu. The New Permanent screen opens as shown in Figure 27.

Figure 27: New Permanent Reservation

2. Complete the Permanent Reservation form as you would a New Reservation form with the exception of selecting arrival and departure dates. (See the "New Reservation" section in this document for details on filling out the Reservation form.)

3. Permanent Reservations do not have a departure date and therefore are only 'deleted' when they are cancelled.

4. When you need to make reservations using a Permanent Reservation, select Create Using Existing from the Reservations icon.

   a. Make the necessary changes for the requested reservation and save.

b. Once reservations have been made and guests have stayed, you can track the usage from the Permanent Reservation report which is found in Marketing.

Cancel a Reservation

You can cancel any reservation with a future arrival date. (You cannot cancel a reservation with a past arrival date.)

1. Select Cancel a Reservation from the Reservations Main menu. The Cancel Reservation selection screen opens.

2. Enter the guest's last name in the Search Last Name For field or double-click on the reservation you wish to cancel.

3. If the reservation has a deposit on it, an AutoClerk Confirm box opens: There is a deposit on reservation *<conf#>*, cancel anyway? If you are not sure of the answer, contact your manager.

    a. If you answer no, you are asked if you want to cancel another reservation.

    b. If you answer yes, or if there is no deposit on the reservation, the Cancel Reservation box opens.

4. If the reservation is the primary of a share-with reservation, and/or the destination reservation for a bill-to reservation(s), an AutoClerk window opens: Issues with cancellation, cancel anyway?

    a. The linked reservation is listed along with the issue: bill-to set or share-with.

        i. If you are not sure of the answer, contact a manager.

            1. If you answer no, you are asked if you want to cancel another reservation.

            2. If you answer yes, the Cancel Reservation box opens.

    b. The Cancel Reservation form is shown in Figure 28.

Figure 28: Cancel Reservation

    c. The window shows the reservation's Cancel Policy to help the clerk determine if the reservation is cancellable.

5. Enter a reason for cancellation in the Cancel Reason field, and click the OK button. An AutoClerk Confirm box opens confirming your cancellation and providing you with a cancellation number.

    a. Once the cancellation is complete, when the user goes to Reservations – Modify a Reservation – Includes Cancelled Reservation, and highlights the cancelled reservation, the reason will appear at the bottom of the selection form.

6. Click the OK button. An AutoClerk Confirm box opens asking you if you wish to cancel another reservation.

7. Click No to return to the Main Menu.

Uncancel a Reservation

1. Select Uncancel a Reservation from the Reservations Main menu. The Canceled Reservation screen opens. All cancelled reservations appear in red.

2. Enter the guest's last name in the Search Group Name For field.

3. Double-click on the reservation you wish to uncancel. You can only uncancel reservations with future arrival dates.

    a. An AutoClerk Confirm box appears confirming the uncancelled reservation and provides you with the original confirmation number.

  b. Click the OK button to return to the Main menu.

Cancel All Holds for a Day

You will use this function if you want to cancel all the non-guaranteed reservations on a specific day. For example, your property has a 4pm cancellation policy. At 5 pm, the clerk would use this to cancel the hold reservations to put them back into availability.

 1. Select Cancel All Holds for a Day from the Reservations Main menu. The Cancel Hold Reservations screen opens as shown in Figure 29.
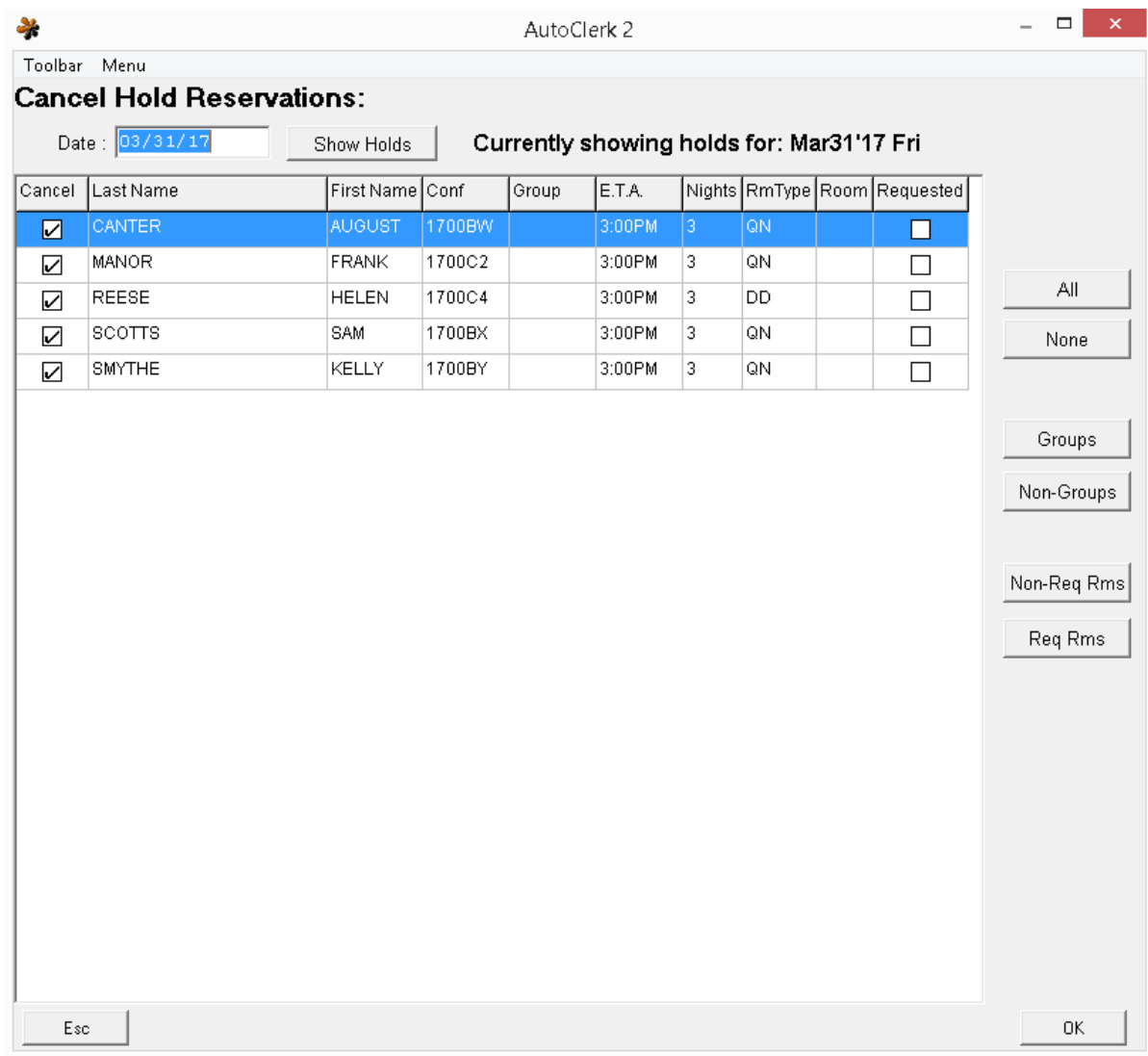
Figure 29: Cancel All Holds

 2. By default, all hold reservations are checked to be cancelled.

3. Uncheck the box associated with any reservation(s) you do not wish to cancel.

   a. You can also use the buttons on the right to select/deselect categories of reservations.

4. Click the OK button and the SendTo screen opens.

   a. If you select Display, you will get an AutoClerk Confirm box for each reservation you cancelled.

      i. Each AutoClerk Confirm box provides you with a Cancellation number, and the default Cancel Reason of 'Cxl Holds'.

      ii. After confirming each cancellation, a browser window opens, and you can view on the screen a Cancel Holds Reservations report.

5. If you select Print, you will see an AutoClerk Confirm box for each reservation you cancelled.

   a. Each AutoClerk Confirm box provides you with a Cancellation number, and the default Cancel Reason of 'Cxl Holds'.

   b. After confirming each cancellation, the Cancel Holds Reservations report is sent to the selected printer.

Advance Deposits

This section details procedures for posting advance monies to reservations prior to a guest's arrival. Typically, you will post an advance deposit for the first night of a guest's stay, but you can collect any amount. A property can configure what parameters they want the default amount to be: first night, full stay, half stay. In addition, a property can configure if it wants taxes and/or an incidental fee to be added to the default amount.

Post an Advance Deposit or Refund

1. Select Advance Deposits from the Reservations Main menu.

2. Select Post an Advance Deposit or Refund. The Post to Reservation list of reservations opens.

3. Enter the guest's last name in the Search Group Name For field.

   a. Double-click on the desired reservation.

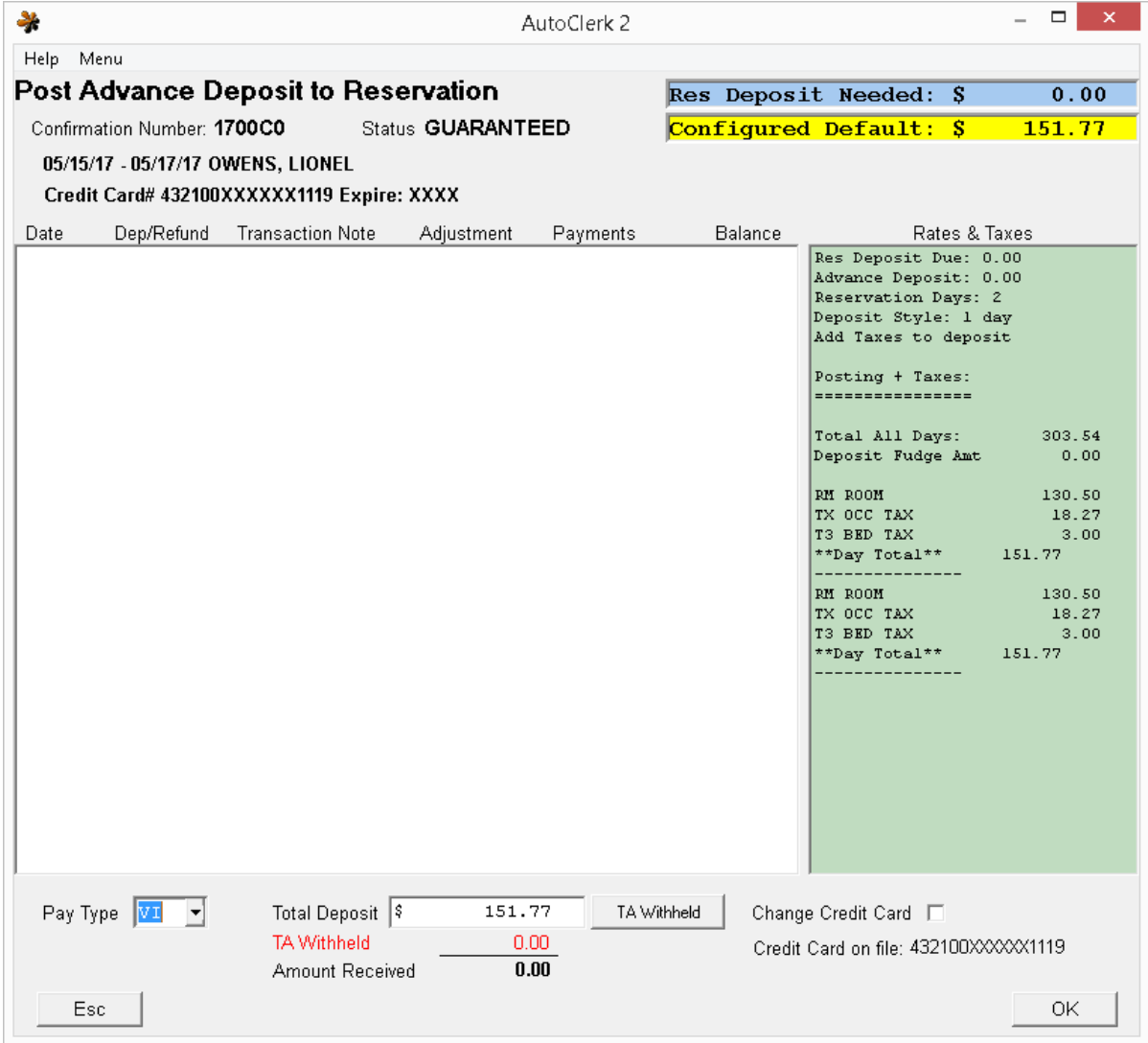4. The Post Advance Deposit to Reservation screen opens as shown in Figure 30.

Figure 30: Post Advance Deposit or Refund

5. The Pay Type is copied from the selected reservation. Confirm the Pay Type. The Amount field will default to the configured amount.

   a. The right hand side of the form, in the green background window, details the guest's stay in terms of daily rate and taxes.

   b. The top of the window details how the deposit amount is calculated. In this example, the deposit is configured for one day and including taxes.

   c. You can change the amount if necessary.

6. The TA Withheld button is used for enter the travel agent commission if it is deducted from the deposit received. This is a rare occurrence.

        a. If you have any questions and/or doubts on how to use this, please call AutoClerk Support (925) 284-1005, Option 2, before posting.

7. If you are using a card other than the card on the reservation, check the Change Credit Card checkbox, click ok, and follow the prompts.

        a. If you are using the credit card on the reservation, click ok. The AutoClerk Data Capture box opens.

        b. Swipe the credit card or click the Esc button to enter the credit card information manually. If you are using the credit card from the reservation, click on the Use Existing Card button. AutoClerk pulls the credit card number and expiration date from the reservation and auto fills the appropriate fields on the form.

8. Click the Save button and then the Transmit button to process the credit card transaction. An AutoClerk confirm box opens confirming the deposit is credited to the reservation. If you don't see the confirm box, the credit is not applied to the reservation.

9. Click the OK button. A SendTo screen opens. Click the Print button to print the receipt. An AutoClerk Confirm box opens asking you if you want to post another deposit.

        a. Click Yes to post another Advance Deposit, or click No to return to the Main menu.

Deposit Folio

Use this function if you need to reprint a receipt (folio) for an advance deposit. Select Advance Deposits from the Reservations Main menu.

1. Select Deposit Folio. The Choose Reservation for Receipt window opens.

2. Enter the guest's last name in the Search Group Name For field.

3. Double-click on the reservation for which you wish to print the receipt or folio. The SendTo screen opens.

4. Select your desired option from the SendTo screen.

Advance Deposit Report

1. Select Advance Deposits from the Reservations Main menu.

2. Select Advance Deposit Report. The SendTo screen appears.

3. Select your desired option from the SendTo screen. If you click the Display button, the report opens in a browser window.

        a. If the reservation has an email address, then email will be an option.

Cancelled Reservations with Deposits Report

This report gives you a list of all reservations that were cancelled with an Advance Deposit. Management should run this report at least once a month if not weekly to see if any reservations were cancelled that need to have the deposit refunded.

1. Select Advanced Deposits from the Reservations Main menu.

2. Select Cancelled Reservations with Deposits Reports.

    a. The SendTo screen appears.

3. Select your desired option from the SendTo screen. If you click the Display button, the report opens in a browser window.

Deposits Due Report

The Deposits Due Reports lists those reservations that have been marked to have a deposit due. It includes any amounts already collected and what amount remains.

1. Select Advance Deposits from the Reservations Main menu.

2. Select Deposits Due Report. The SendTo screen appears.

3. Select your desired option from the SendTo screen. If you click the Display button, the report opens in a browser window.

List Reservations

By default, this report gives you a list of the current day's arrivals, with basic information such as room type, number of guests and rate as shown in Figure 31.

TEST HOTEL 6.2.5
Reservation Report
Hotel Date: Mar-31-2017

Conf #	Group #	Name of Guest	Sources	Status	Arrival	RC	Type	Rms	Days	Rate	Deposit
1700C1		ADMASLEY, JASON	OH--	GTD	Mar31'17	CO	QN	1	3	$145	$0.00
1700B		CANTER, AUGUST	OH--	HOLD	Mar31'17	CO	QN	1	3	$145	$0.00
1700C3		DEANS, JANE	OH--	GTD	Mar31'17	CO	QN	1	3	$145	$0.00
1700BX		SCOTTS, SAM	OH--	HOLD	Mar31'17	CO	QN	1	3	$145	$0.00
1700BY		SMYTHE, KELLY	OH--	HOLD	Mar31'17	CO	QN	1	3	$145	$0.00

Arrivals	5
Total Res Count	5
Total Rooms	5
Total People	10-0-0
Total Days	15
Total Deposits	0.00

Arrival Room Count	5
Total Cribs	0
Total Rollaways	0
Total Rate (1st night of res)	725.00
Total Rate (inside rep dates)	725.00
Total Rate (all nights)	2,075.00

Figure 31: List Reservations – Basic List

If you want to see a specific date(s) and/or more detail:

1. Select List Reservations from the Reservations Main menu.

2. Click Options in the SendTo screen.

    a. The List Reservations Report Options screen opens as shown in Figure 32.
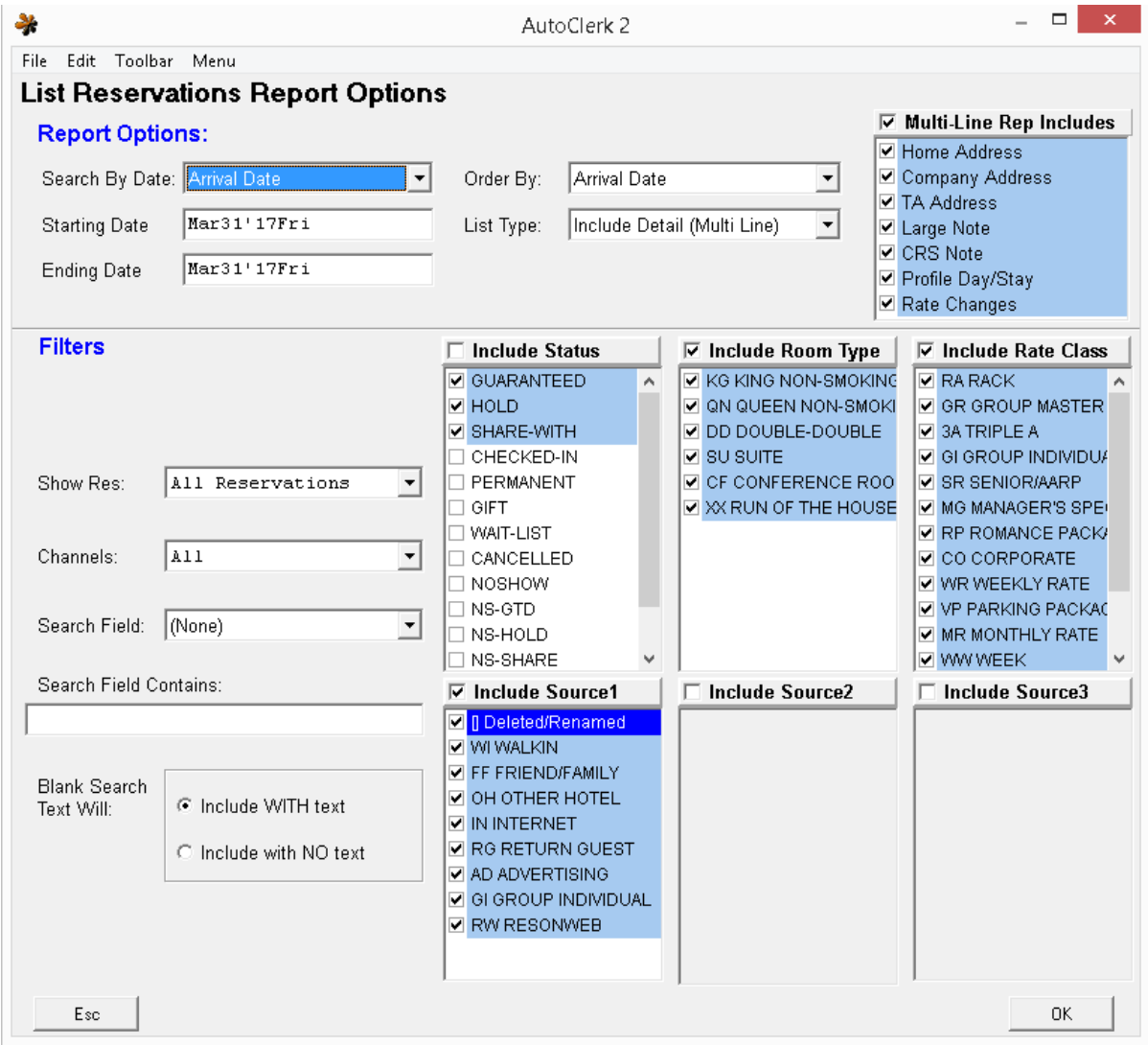
Figure 32: List Reservations Options

    b. The defaults are to show the current day's arrivals with all the detail.

    c. Some of the parameters include:

        i. Reservations created on or cancelled on a particular day.

        ii. Reservations due to arrive on a certain day.

        iii. All reservations with a specific rate class or room type.

iv. All reservations with specific wording in the Specials field, i.e. VIP or package amenities.

v. Reservations with certain source codes.

vi. Generating the report in a variety of formats.

1. If you select 'Selection List', the list will be in a format that you can click on reservation and be brought to it, make and changes, etc, and then be returned to the selection list.

d. A sample of the default report is shown in Figure 33.

TEST HOTEL 6.2.5
Reservation Report
Hotel Date: Mar-31-2017

Conf #	Group #	Name of Guest	Sources	Status	Arrival	RC	Type	Rms	Days	Rate	Deposit
1700C1		ADMASLEY, JASON	OH--	GTD	Mar31'17	CO	QN	1	3	$145	$0.00

Arr: Mar31'17 Fri Dep: Apr 3'17 Mon Created: Mar31'17 Fri(HM) People: 2-0-0
Pay: AX(AMEX   XX2221 Verified) ETA: 3:00PM
Home: 2921 FRAND AVE CASSTOWN OH 45312 UNITED STATES Opt-In Phone: 256-555-1212
Rate & Changes: Mar31'17 ($145.00) Apr 2'17 ($125.00)

| 1700B | | CANTER, AUGUST | OH-- | HOLD | Mar31'17 | CO | QN | 1 | 3 | $145 | $0.00 |

Arr: Mar31'17 Fri Dep: Apr 3'17 Mon Created: Mar31'17 Fri(HM) People: 2-0-0 Pay: CA(CASH)
ETA: 3:00PM
Home: 2921 FRAND AVE CASSTOWN OH 45312 UNITED STATES Opt-In Phone: 256-555-1212
Rate & Changes: Mar31'17 ($145.00) Apr 2'17 ($125.00)

| 1700C3 | | DEANS, JANE | OH-- | GTD | Mar31'17 | CO | QN | 1 | 3 | $145 | $0.00 |

Arr: Mar31'17 Fri Dep: Apr 3'17 Mon Created: Mar31'17 Fri(HM) People: 2-0-0
Pay: VI(VISA   XX1119 Verified) ETA: 3:00PM
Home: 2921 FRAND AVE CASSTOWN OH 45312 UNITED STATES Opt-In Phone: 256-555-1212
Rate & Changes: Mar31'17 ($145.00) Apr 2'17 ($125.00)

Figure 33: List Reservations with Options

e. If you want a report other than the default, select your parameters.

f. Click the OK button, and the SendTo screen appears.

4. Click the Print button to print a list of the reservations that meet your chosen parameters. If you click the Display button, the report opens in a browser window.

Reservation Report Generator

The Reservation Report Generator allow the user to create a custom report on Reservations.

1. Select Reservation Report Generator from the Reservations Main menu.

2. The Reservation Report Generator form appears as shown in Figure 34.
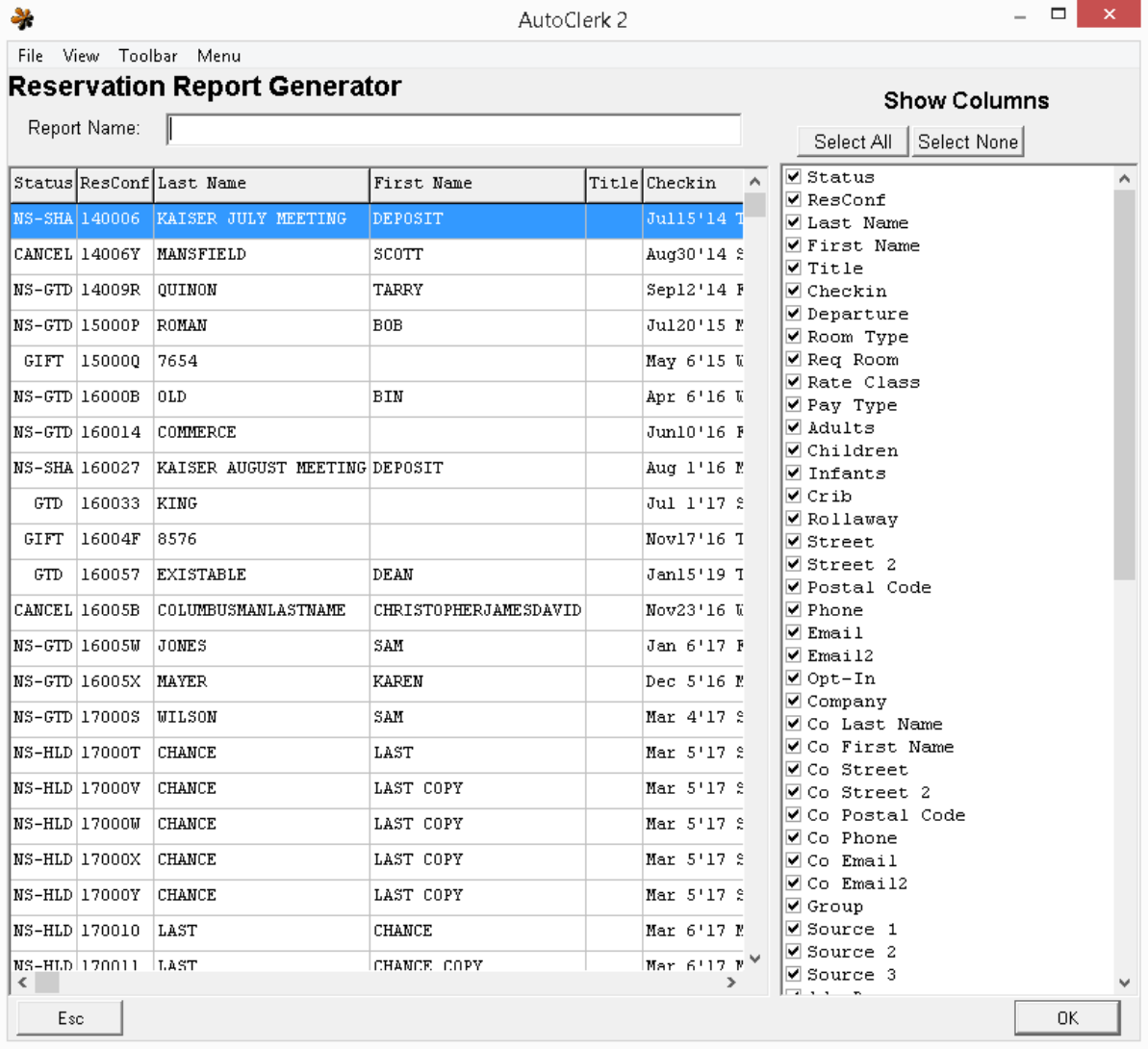
Figure 34: Reservation Report Generator

Title Bar

The following options/functions are available on the Title Bar:

1. File

   a. Print: Opens the SendTo menu for you to select an output for the requested report.

   b. Open Design: Opens the file location of your saved designs.

      i. If you have saved designs/templates as described below, they will be listed here.

         1. Double click on the .txt file you want to use.

        2. The window closes and you are returned to the Report Generator form with the selected design showing.

    c. Save Design: Opens the file location so you can save your design/set up as a template.

        i. Give the report a name

        ii. Select the fields you want to show on the report by checking and/or unchecking the checkboxes next to the field label.

        iii. You can sort the report by selecting Sort under the View drop down.

        iv. Click on Save Design.

    d. Exit: Closes the form and returns you to the Main Menu.

2. View

    a. Restore Field Order: If you have checked/unchecked numerous field labels and want to get back to the starting point, click this.

    b. Sort: Allows you to sort up to two (2) columns.

    c. Manage Fast Selections: Allows you to add, remove and sort the designs/templates you have created.

        i. Setting up Fast Selections allows the user to quickly load a template for printing and/or displaying.

        ii. Once you have created a design as detailed above, click on View, click on Manage Fast Selections.

            1. The Fast Selection Setup window opens with ID line 1 highlighted.

            2. Click the Add button and the Open File window opens.

            3. Double click the .txt you want in ID 1.

            4. The Open File window closes and you are returned to the Fast Selection Setup window.

                a. Repeat the steps if you have additional templates to add. Be sure to use a new ID line for each one.

                b. When you are finished, click OK.

            5. Now, when you click on View, the templates are Fast Selections and are listed at the bottom of the View menu.

                a. Click on the template you want to use.

                b. The Auto Post form reloads with the selected template.

3. Toolbar: Use this to access the Function Keys (F keys)

a. If you know the key you want to use, you can just use the keyboard key. For example, hitting F4 will bring up Availability.

4. Menu: Allows you to open another instance of AutoClerk.

Print Registration Slips

1. Select Print Registration Slips from the Reservations Main menu. The SendTo screen opens.

2. Click the Print button to print the registration cards due to arrive today. The default is to *not* include any group reservations due to arrive today.

3. If you wish to print registrations for a different date, a single registration slip, or include group reservations, select the Options buttons, and select options as needed.

4. After selecting your options, click OK. The SendTo screen opens.

5. Click the Print button to print the selected registration slips.

Reg Slip Walkout

This feature is only available if your property has Registration Slip Tracking enabled. It allows the user to track a registration slip number when a walk in guest decides not to stay.

1. If you are checking in a walkin and escape from the form, you are presented with the Registration Slip Number for to enter the Guest's last name.

2. If you are interested in this feature, please contact AutoClerk Support: (925) 284-1005, Option 2.

Print Confirmation Letters

1. Select Print Confirmation Letters from the Reservations Main menu.

2. Select the date range for the letters you wish to print.

3. Enter the number of days for mailing.

4. Check the boxes, if applicable, for letters related to modified or group reservations.

5. Click the OK button. The SendTo screen appears.

6. Click the Print button. An AutoClerk Information box appears and confirms the number of confirmation letters processed. This feature does *not* give the user the option to email confirmation letters, only to print them for mailing,

7. Click the OK button to return to the Main menu.

List of Figures

Index of AutoClerk V9 Icons, Menus, and Commands for Reservations Module