

REZ  VATION
GT Quick Start Guide

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Thank you for your purchase of RezOvation GT.

RezOvation GT is a comprehensive front desk property management software and guest management software designed specifically for the accommodations industry. It is designed with the ease of use of Guest Tracker in mind along with new simple yet powerful features such as a modern user interface and a flexible rate management system. In addition, RezOvation GT offers enhanced Booking Engine integration as well as integration with the BedandBreakfast.com online reservation program. RezOvation GT was built using the latest in Microsoft programming technology and is based on the robust SQL Express 2005 database engine. Our state of the art design is perfect for bed and breakfasts, inns, and other lodging related businesses.

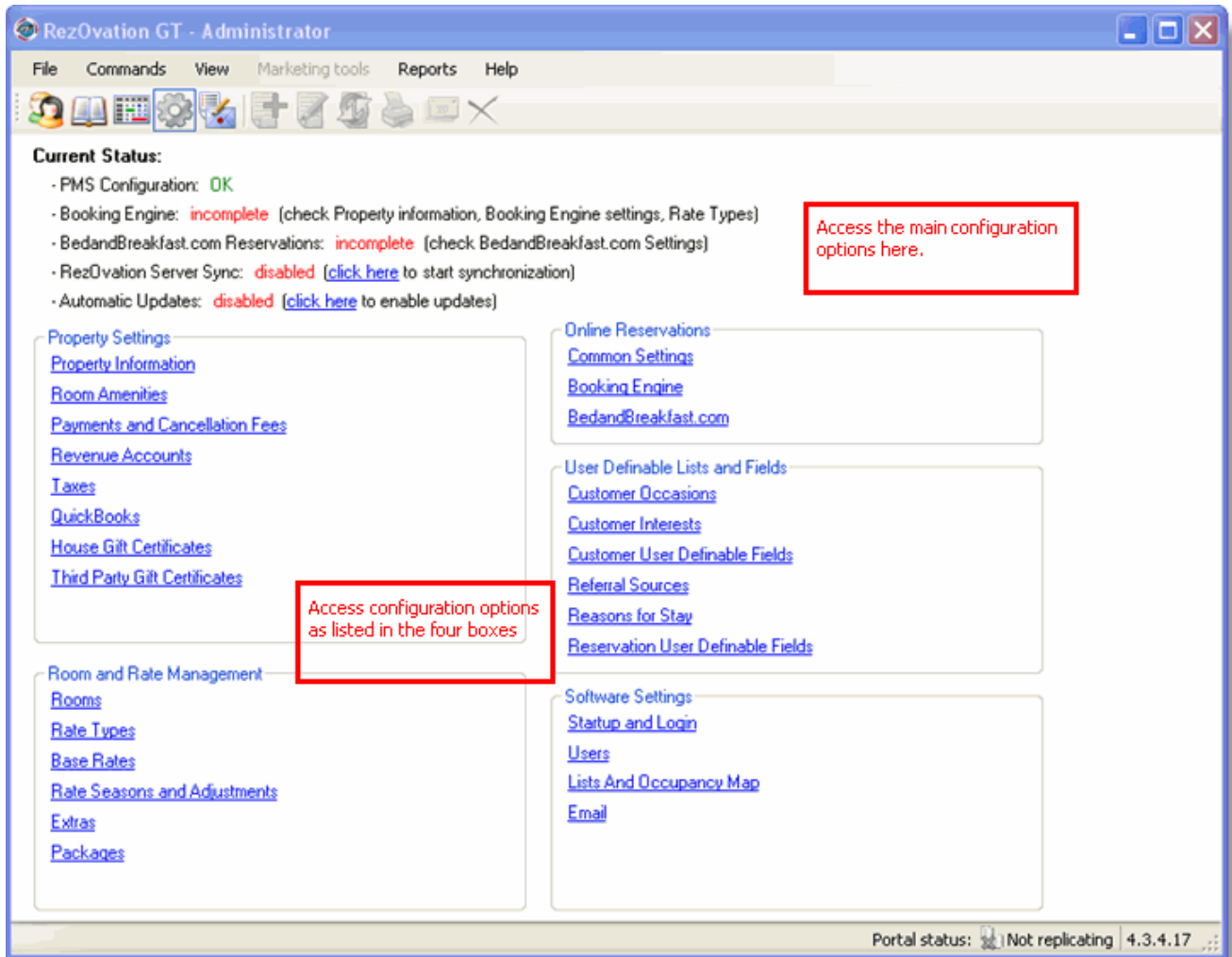
This Quick Start Guide will quickly teach you the basic concepts of using RezOvation GT. For a more complete guide, please explore the rest of the help file, refer to the User's Guide, or visit our web site – <http://www.RezOvation.com>.

Configuration Overview

Before you begin using RezOvation GT, you will need to set up the software so it will conform to how you manage your property.

To access system configuration:

Click the **Configuration** icon  or select **View > Program Configuration** from the menu to display the Configuration window.



Current Status:

- PMS Configuration: **OK**
- Booking Engine: **incomplete** (check Property information, Booking Engine settings, Rate Types)
- BedandBreakfast.com Reservations: **incomplete** (check BedandBreakfast.com Settings)
- RezOvation Server Sync: **disabled** ([click here](#) to start synchronization)
- Automatic Updates: **disabled** ([click here](#) to enable updates)

Property Settings

- [Property Information](#)
- [Room Amenities](#)
- [Payments and Cancellation Fees](#)
- [Revenue Accounts](#)
- [Taxes](#)
- [QuickBooks](#)
- [House Gift Certificates](#)
- [Third Party Gift Certificates](#)

Room and Rate Management

- [Rooms](#)
- [Rate Types](#)
- [Base Rates](#)
- [Rate Seasons and Adjustments](#)
- [Extras](#)
- [Packages](#)

Online Reservations


- [Common Settings](#)
- [Booking Engine](#)
- [BedandBreakfast.com](#)

User Definable Lists and Fields

- [Customer Occasions](#)
- [Customer Interests](#)
- [Customer User Definable Fields](#)
- [Referral Sources](#)
- [Reasons for Stay](#)
- [Reservation User Definable Fields](#)

Software Settings

- [Startup and Login](#)
- [Users](#)
- [Lists And Occupancy Map](#)
- [Email](#)

Portal status:  Not replicating | 4.3.4.17



If you manage rates and amenities by individual room you will not have a "Room Types" option in the Rate and Inventory Management section.

From here you can do the following:

- Configure Property Settings

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- Define Property Information
 - Define Room Amenities
 - Define Payments and Cancellation Fees
 - Define Revenue Accounts
 - Define Taxes
 - Setup QuickBooks options
 - Setup House and Third Party Gift Certificates.
- Configure Rate and Inventory Management
 - Define Rooms
 - Define Room Types (if you manage rates or amenities by room type)
 - Define Rate Types
 - Define Base Rates
 - Make Rate Seasons and Adjustments
 - Define Extras
 - Define Packages
- Configure Online Reservations
 - Define Common Online Settings
 - Configure the Booking Engine
 - Configure BedandBreakfast.com
- Configure User Definable Lists and Fields
 - Define Customer Occasions
 - Define Customer Interests
 - Define Referral Sources
 - Define Reasons for Stay
 - Setup User Definable Fields for Customers and Reservations
- Software Settings
 - Configure Startup and Login
 - Setup Users
 - Set Options for Lists and the Occupancy Map
 - Setup Email
- Synchronize your database to the RezOvation server
- Enable auto updates

 **Managing Via Individual Rooms or Room Types**

When you initialized RezOvation GT, you selected a room and rate management scenario. The choices were as follows:

Scenario 1 - Manage room attributes and rates by individual room.

Select this option if the rooms on your property are all unique. You will set up rates and amenities individually for each room.

Scenario 2 - Manage rates attributes by individual room and rates by room type.

Select this option if your property has similar rooms of a certain type, but the rooms have different amenities. For example, you may want to set up rates based on the type of room (all king size rooms, for example), but still set up the amenity for each king room individually. You will set up room types, assign groups of rooms to each room type, but set up room amenities individually for each room with each room type.

Scenario 3 - Manage room attributes and rates by room type.

Select this option if your property has similar rooms of a certain type, and all those rooms have similar amenities. You will set up room types and assign groups of similar rooms and amenities to each room type.

To begin setting up rooms and room rates, you will follow a path determined by the scenario you selected during initialization.

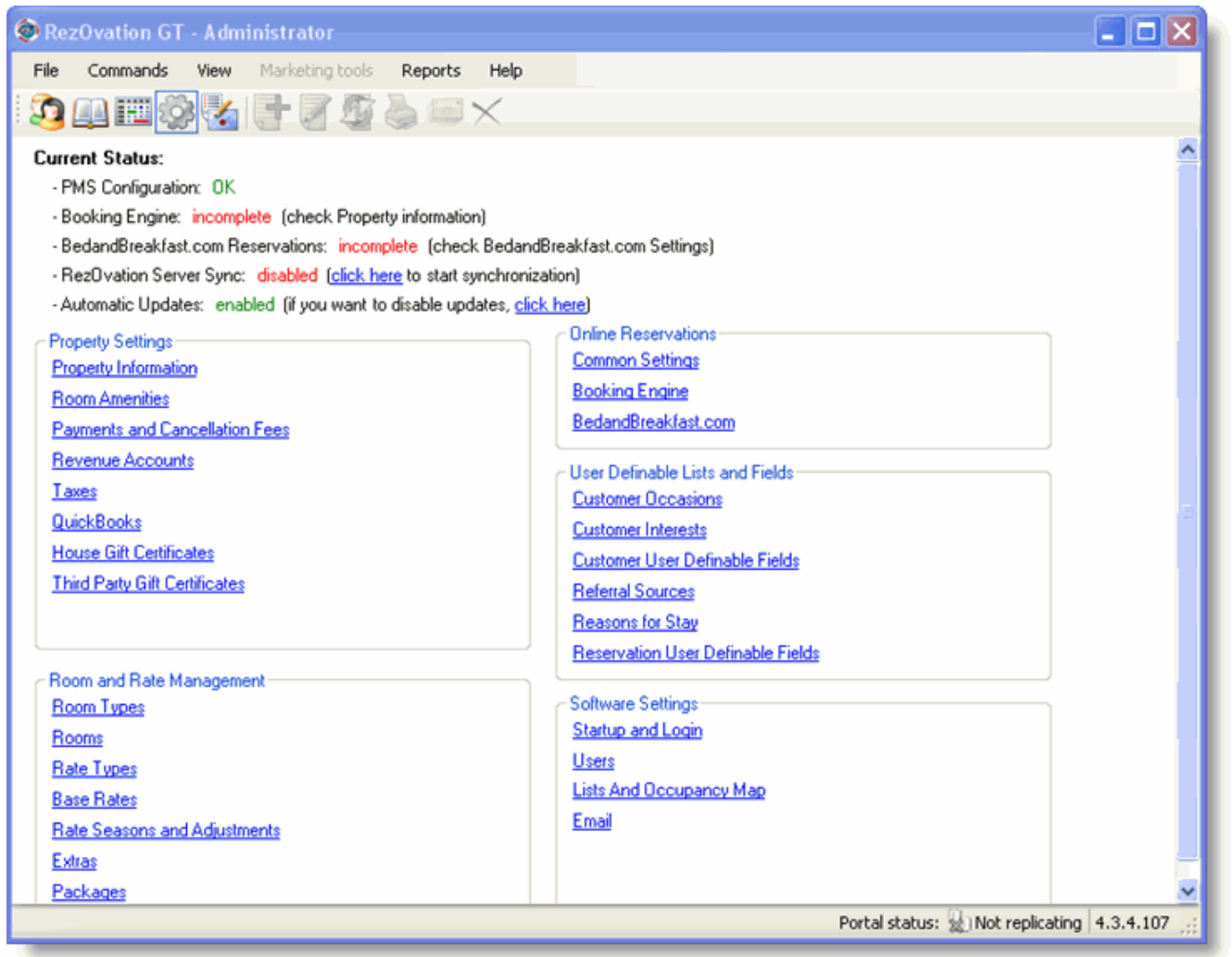
 **Room Types Overview**

Set up room types when your property has several rooms of the same type and you want to group them. For instance, you may have a group of rooms with king size beds. You can set up a room type "king" and assign all king rooms to that room type. You can then assign room rates to the "king" room type and all rooms assigned to that room type will inherit those rates. In other words, you will not have to assign rates to each king room individually if you set up room type for all king rooms.

To access room types:

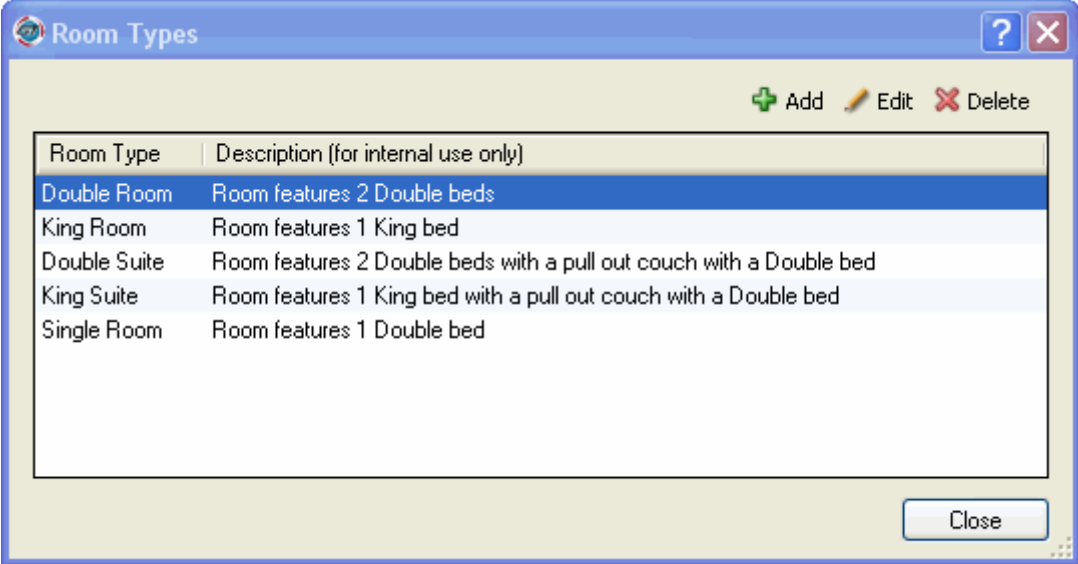
1. Click the **Configuration** icon  or select **View > Program Configuration** from the menu to display the Configuration window.

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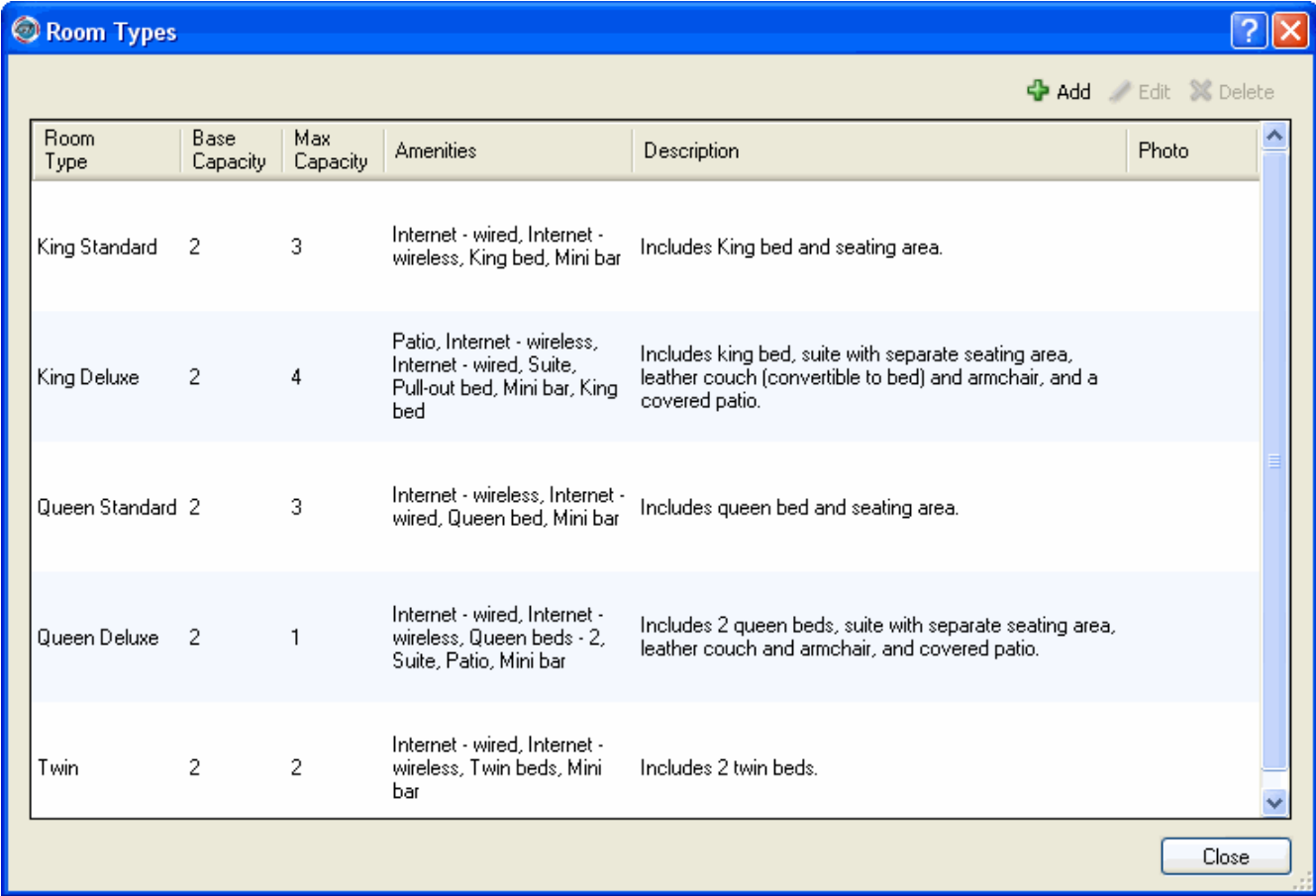


2. Click **Room Types** to display the Room Types window.

You will see one of the following two Room Types windows depending on if you manage rates by room type and amenities by individual room or if you manage both rates and amenities by room type.



Room Types Screen - manage rates by room type and amenities by individual room



Room Types Screen - manage rates and amenities by room type

 **Rooms Overview**

The method you will use to set up rooms depends on the scenario you selected when you initialized RezOvation GT. To review, your scenario choices were as follows:

Scenario 1 - Manage rates and amenities for each room individually.

Select this option if the rooms on your property are all unique. You will set up rates and amenities individually for each room.

Scenario 2 - Manage rates by room type, but amenities for each room individually.

Select this option if your property has similar rooms of a certain type, but the rooms have different amenities. For example, you may want to set up rates based on the type of room (all king size rooms, for example), but still set up the amenity for each king room individually. You will set up room types, assign groups of rooms to each room type, but set up room amenities individually for each room with each room type.

Scenario 3 - Manage both rates and amenities by room type.

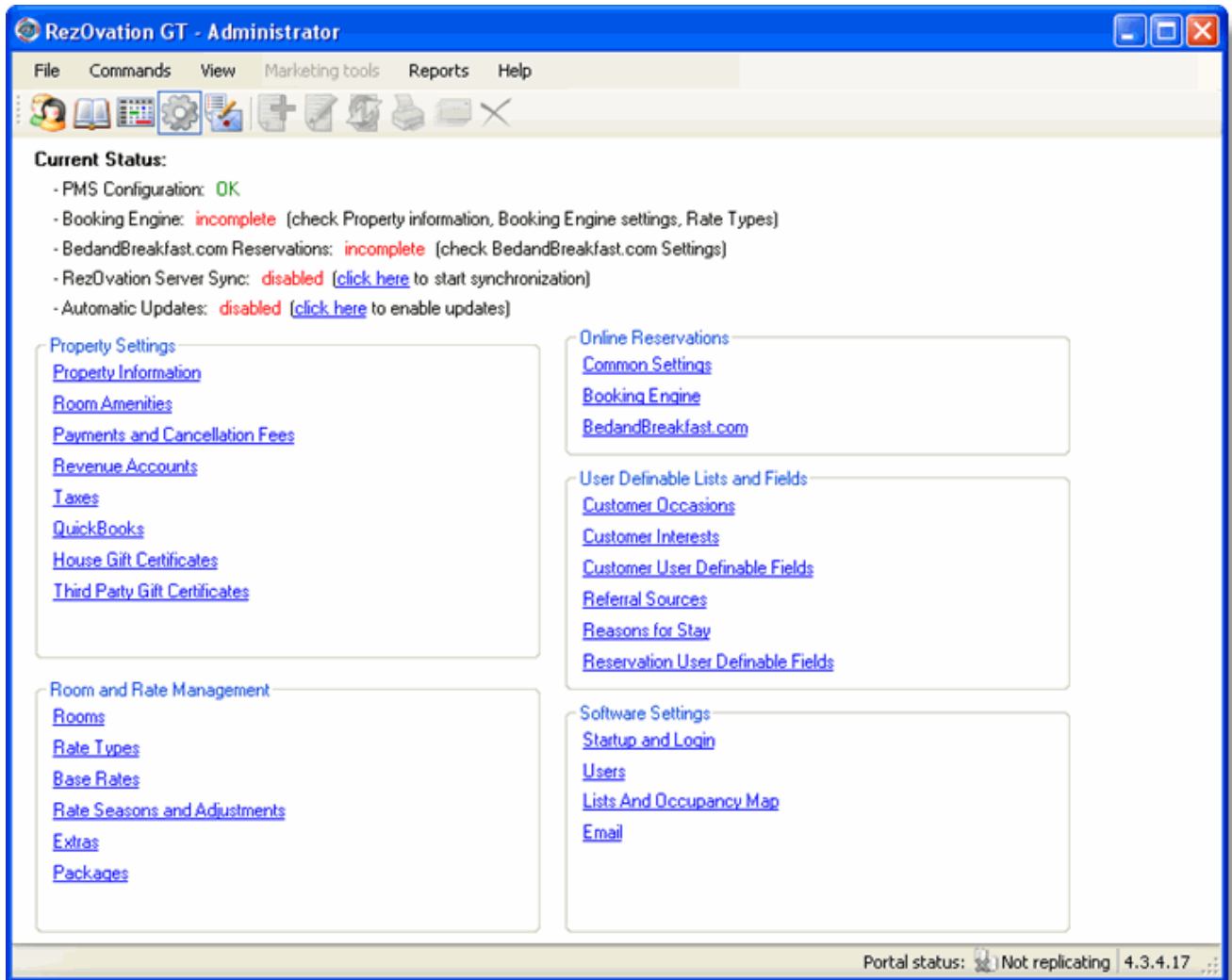
Select this option if your property has similar rooms of a certain type, and all those rooms have similar amenities. You will set up room types and assign groups of similar rooms and amenities to each room type.

If you selected Scenario 2 or Scenario 3, you should have already set up room types. When you set up room types you either defined amenities for each room type or you decided that you would define amenities for each individual room.

If you selected Scenario 1, you did not need to define room types and will set up rooms and amenities by individual room.

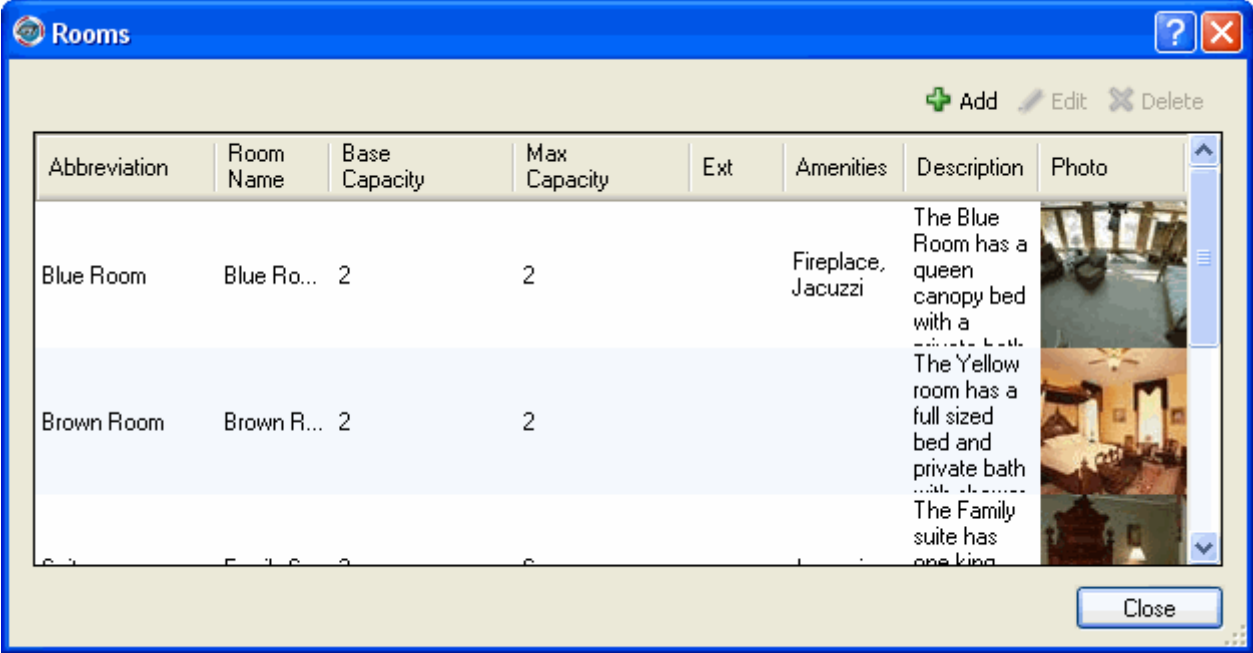
To access rooms:

1. Click the **Configuration** icon  or select **View > Program Configuration** from the menu to display the Configuration window.

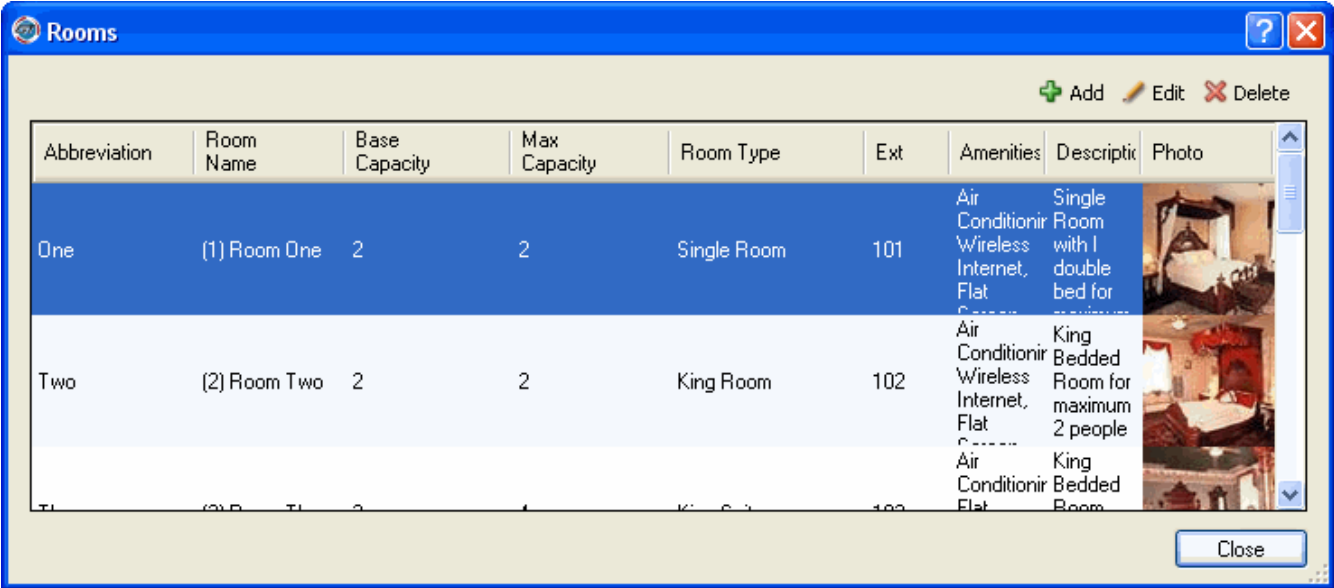


2. Click **Rooms** to display the Rooms window.

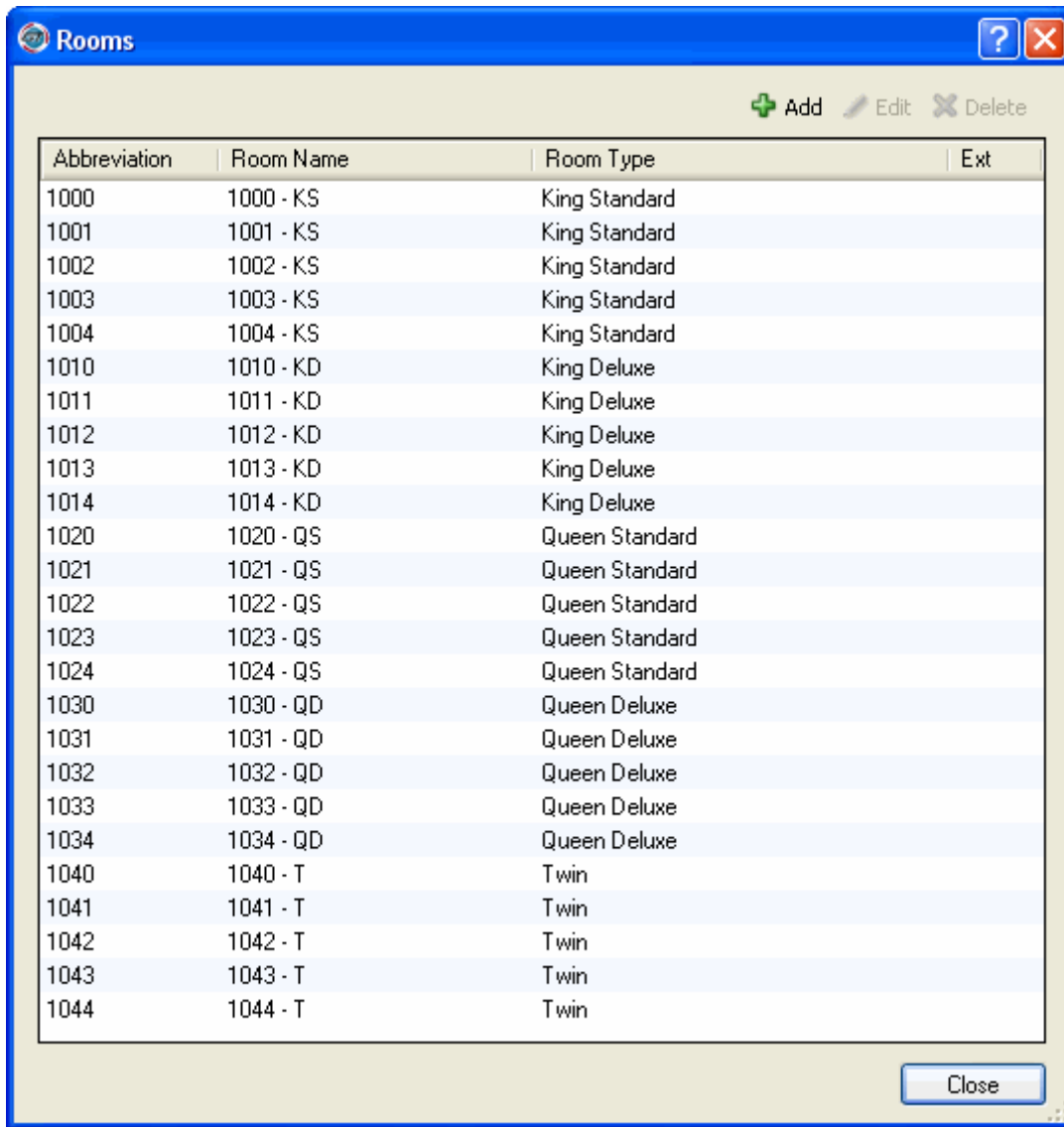
You will see one of the following three Rooms windows depending on how you manage rates and amenities.



Rooms Screen - Scenario 1 - Manage rates and amenities for each room individually



Rooms Screen - Scenario 2 - Manage rates by room type, but amenities for each room individually



Rooms Screen - Scenario 3 - Manage both rates and amenities by room type

To set up rooms, follow the path that corresponds to how you manage rooms and rates.

- Manage rates and amenities for each room individually
- Manage rate by room type, but amenities for each room individually
- Manage both rates and amenities by room type

You can add, edit, and delete room types or you can add, edit, and delete both room types and room type amenities depending on how you manage rooms and rates.

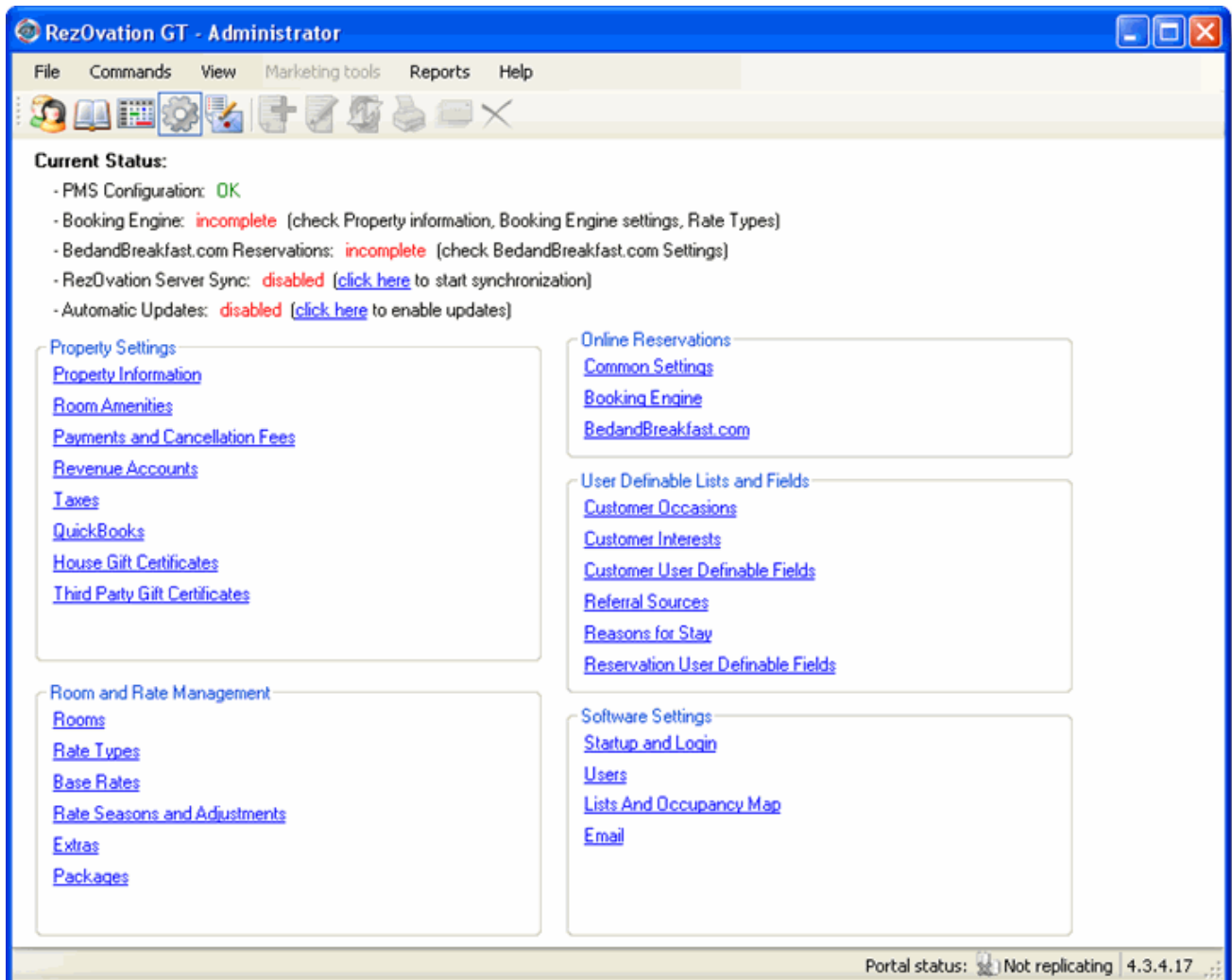
The Rate Matrix

You may find that you want to override your base rates. You may charge different rates depending on seasons of the year, or you may have blackout dates you apply for certain rates. Regardless of the reason, RezOvation allows you to change rates for specific dates.

The rate matrix is used to change rates or minimum stay requirements for specific dates.

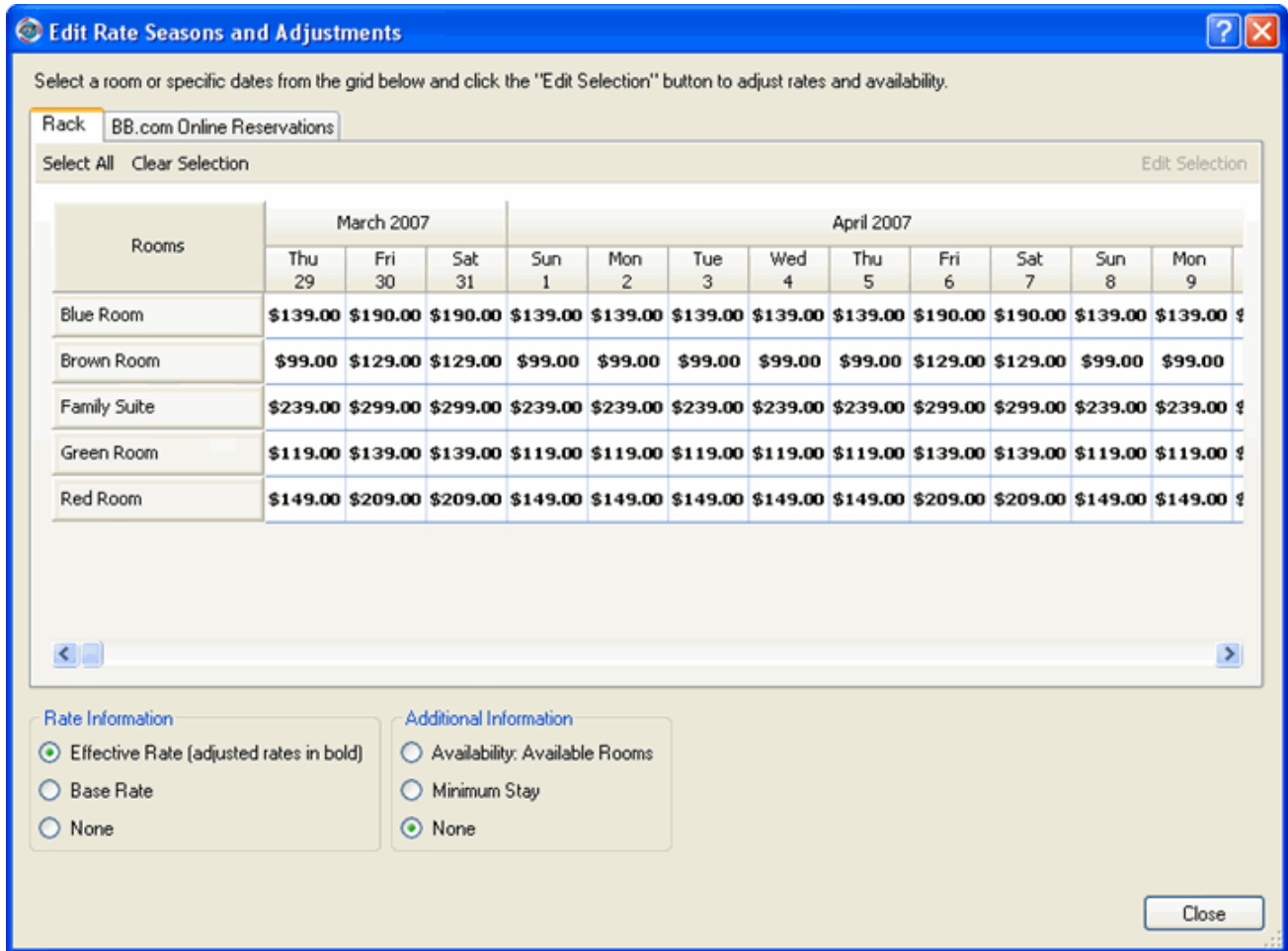
To access the rate matrix:

1. Click the **Configuration** icon  or select **View > Program Configuration** from the menu to display the Configuration window.



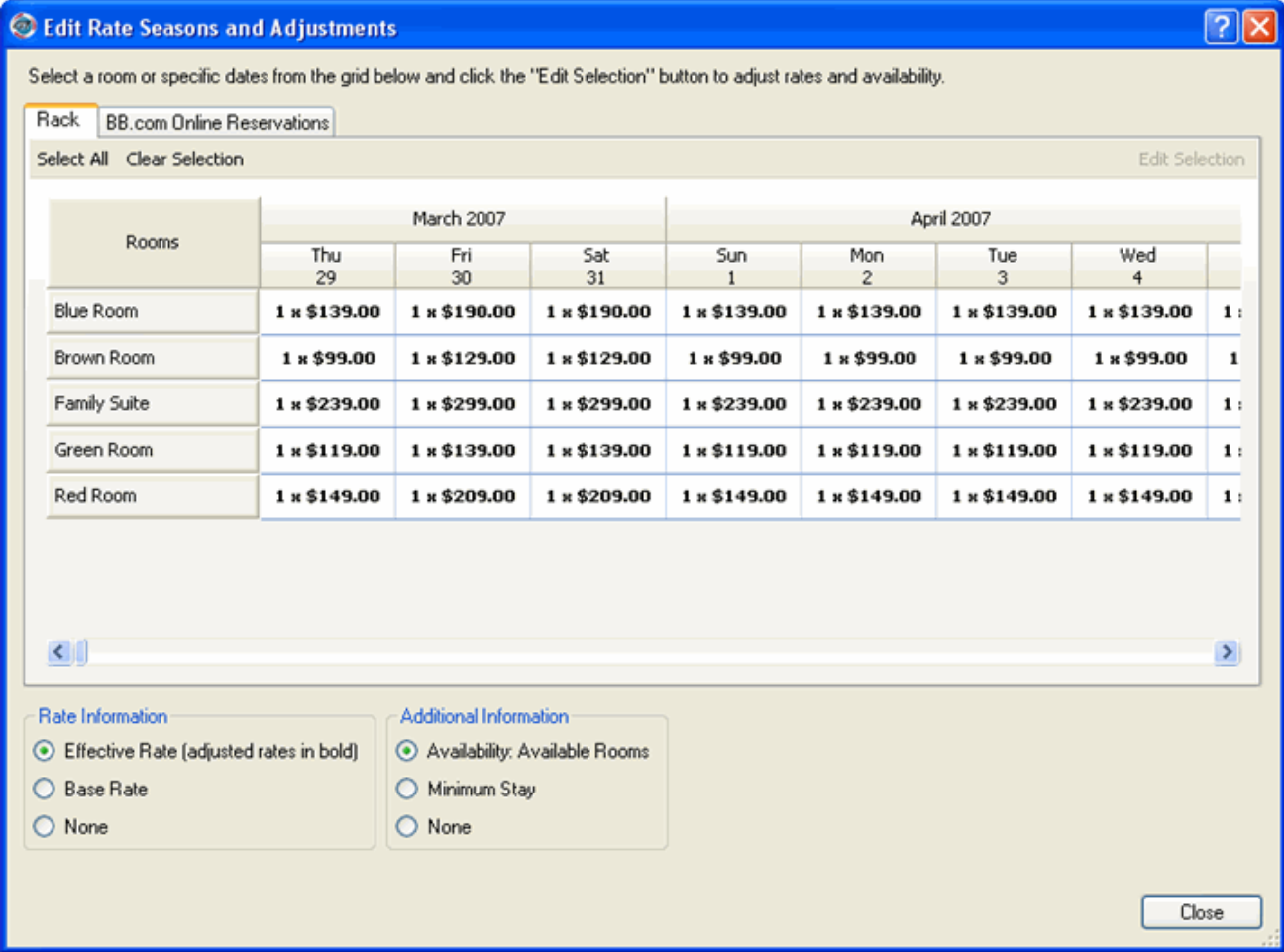
2. Click **Rate Seasons and Adjustments** to display the Rate Matrix.

You can also access the Rate Matrix by selecting **Rate Seasons and Adjustments** from the View menu.



Navigating the Rate Matrix

- Click a tab to display the base rates for the various rate types.
- Highlight a date or date range by mousing-over the date(s). You can highlight any range of dates - dates do not have to be next to each other. Click **Clear Selection** to clear the dates you have selected.
- Click **Edit Selection** to edit rate and minimum stay information for the room/date range you have selected.
- Use the horizontal scroll bar to scroll forward through the months of the year.
- Use the Rate Information section to select how you want to view rates. You can view rates by the **effective rate**, the **base rate**, or none to hide all rates. When viewing rates by effective rate, any adjusted rates are shown in boldface type.
- Use the Additional Information section to select alternate information. Selecting none displays the rates by date for each room. Selecting Availability changes the matrix display to the following:



The available rooms are listed with the total number of room in parenthesis - avail rooms (total rooms) x price for room.

- Selecting Minimum Stay changes the rate matrix display to the following:

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Edit Rate Seasons and Adjustments

Select a room or specific dates from the grid below and click the "Edit Selection" button to adjust rates and availability.

Rack: BB.com Online Reservations

Select All Clear Selection Edit Selection

Rooms	March 2007			April 2007					
	Thu 29	Fri 30	Sat 31	Sun 1	Mon 2	Tue 3	Wed 4	Thu 5	Fri 6
Blue Room	1 - \$139.00	1 - \$190.00	1 - \$190.00	1 - \$139.00	1 - \$139.00	1 - \$139.00	1 - \$139.00	1 - \$139.00	1 - \$190.00
Brown Room	1 - \$99.00	1 - \$129.00	1 - \$129.00	1 - \$99.00	1 - \$99.00	1 - \$99.00	1 - \$99.00	1 - \$99.00	1 - \$129.00
Family Suite	1 - \$239.00	1 - \$299.00	1 - \$299.00	1 - \$239.00	1 - \$239.00	1 - \$239.00	1 - \$239.00	1 - \$239.00	1 - \$299.00
Green Room	1 - \$119.00	1 - \$139.00	1 - \$139.00	1 - \$119.00	1 - \$119.00	1 - \$119.00	1 - \$119.00	1 - \$119.00	1 - \$139.00
Red Room	1 - \$149.00	1 - \$209.00	1 - \$209.00	1 - \$149.00	1 - \$149.00	1 - \$149.00	1 - \$149.00	1 - \$149.00	1 - \$209.00

Rate Information: Effective Rate (adjusted rates in bold) Base Rate None

Additional Information: Availability: Available Rooms Minimum Stay None

Close


The minimum stay required for each room is displayed along with the rate for the room.

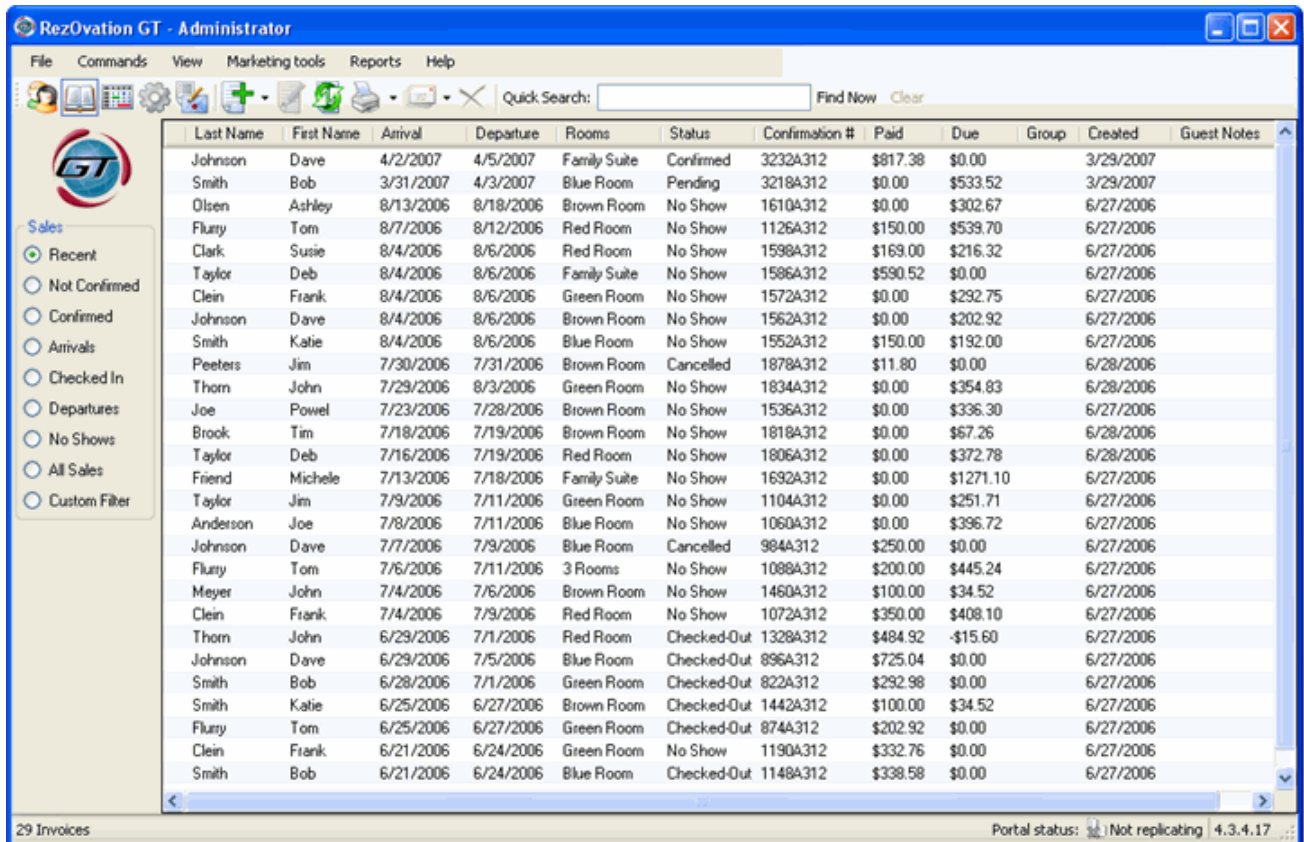
From the rate matrix you can edit rates, add blackout dates, and update minimum stays and availability.

The Reservations List

The reservations window allows you to view all reservations or to view reservations based on certain criteria. You can also add, edit, and delete reservations from this window.

To access the reservations window:

Click the **Reservations and Sales** icon  or select **View > Reservations and Sales** from the menu to display the Reservations window.




The screenshot shows the RezOvation GT - Administrator window. The main area displays a table of reservations with the following columns: Last Name, First Name, Arrival, Departure, Rooms, Status, Confirmation #, Paid, Due, Group, Created, and Guest Notes. A sidebar on the left contains a 'Sales' section with radio buttons for 'Recent', 'Not Confirmed', 'Confirmed', 'Arrivals', 'Checked In', 'Departures', 'No Shows', 'All Sales', and 'Custom Filter'. The 'Recent' option is selected. At the bottom of the window, it shows '29 Invoices' and 'Portal status: Not replicating 4.3.4.17'.

Last Name	First Name	Arrival	Departure	Rooms	Status	Confirmation #	Paid	Due	Group	Created	Guest Notes
Johnson	Dave	4/2/2007	4/5/2007	Family Suite	Confirmed	3232A312	\$817.38	\$0.00		3/29/2007	
Smith	Bob	3/31/2007	4/3/2007	Blue Room	Pending	3218A312	\$0.00	\$533.52		3/29/2007	
Olsen	Ashley	8/13/2006	8/18/2006	Brown Room	No Show	1610A312	\$0.00	\$302.67		6/27/2006	
Flury	Tom	8/7/2006	8/12/2006	Red Room	No Show	1126A312	\$150.00	\$539.70		6/27/2006	
Clark	Susie	8/4/2006	8/6/2006	Red Room	No Show	1598A312	\$169.00	\$216.32		6/27/2006	
Taylor	Deb	8/4/2006	8/6/2006	Family Suite	No Show	1586A312	\$590.52	\$0.00		6/27/2006	
Clein	Frank	8/4/2006	8/6/2006	Green Room	No Show	1572A312	\$0.00	\$292.75		6/27/2006	
Johnson	Dave	8/4/2006	8/6/2006	Brown Room	No Show	1562A312	\$0.00	\$202.92		6/27/2006	
Smith	Katie	8/4/2006	8/6/2006	Blue Room	No Show	1552A312	\$150.00	\$192.00		6/27/2006	
Peeters	Jim	7/30/2006	7/31/2006	Brown Room	Cancelled	1878A312	\$11.80	\$0.00		6/28/2006	
Thorn	John	7/29/2006	8/3/2006	Green Room	No Show	1834A312	\$0.00	\$354.83		6/28/2006	
Joe	Powel	7/23/2006	7/28/2006	Brown Room	No Show	1536A312	\$0.00	\$336.30		6/27/2006	
Brook	Tim	7/18/2006	7/19/2006	Brown Room	No Show	1818A312	\$0.00	\$67.26		6/28/2006	
Taylor	Deb	7/16/2006	7/19/2006	Red Room	No Show	1806A312	\$0.00	\$372.78		6/28/2006	
Friend	Michele	7/13/2006	7/18/2006	Family Suite	No Show	1692A312	\$0.00	\$1271.10		6/27/2006	
Taylor	Jim	7/9/2006	7/11/2006	Green Room	No Show	1104A312	\$0.00	\$251.71		6/27/2006	
Anderson	Joe	7/8/2006	7/11/2006	Blue Room	No Show	1060A312	\$0.00	\$396.72		6/27/2006	
Johnson	Dave	7/7/2006	7/9/2006	Blue Room	Cancelled	984A312	\$250.00	\$0.00		6/27/2006	
Flury	Tom	7/6/2006	7/11/2006	3 Rooms	No Show	1088A312	\$200.00	\$445.24		6/27/2006	
Meyer	John	7/4/2006	7/6/2006	Brown Room	No Show	1460A312	\$100.00	\$34.52		6/27/2006	
Clein	Frank	7/4/2006	7/9/2006	Red Room	No Show	1072A312	\$350.00	\$408.10		6/27/2006	
Thorn	John	6/29/2006	7/1/2006	Red Room	Checked-Out	1328A312	\$484.92	-\$15.60		6/27/2006	
Johnson	Dave	6/29/2006	7/5/2006	Blue Room	Checked-Out	896A312	\$725.04	\$0.00		6/27/2006	
Smith	Bob	6/28/2006	7/1/2006	Green Room	Checked-Out	822A312	\$292.98	\$0.00		6/27/2006	
Smith	Katie	6/25/2006	6/27/2006	Brown Room	Checked-Out	1442A312	\$100.00	\$34.52		6/27/2006	
Flury	Tom	6/25/2006	6/27/2006	Green Room	Checked-Out	874A312	\$202.92	\$0.00		6/27/2006	
Clein	Frank	6/21/2006	6/24/2006	Green Room	No Show	1190A312	\$332.76	\$0.00		6/27/2006	
Smith	Bob	6/21/2006	6/24/2006	Blue Room	Checked-Out	1148A312	\$338.58	\$0.00		6/27/2006	

Using Quick Search

To quickly find a record use the Quick Search feature located at the top of the window.



The image shows a close-up of the 'Quick Search' field. It consists of a text input box followed by 'Find Now' and 'Clear' buttons.

You can search for values in the following fields:

- Last Name
- First Name

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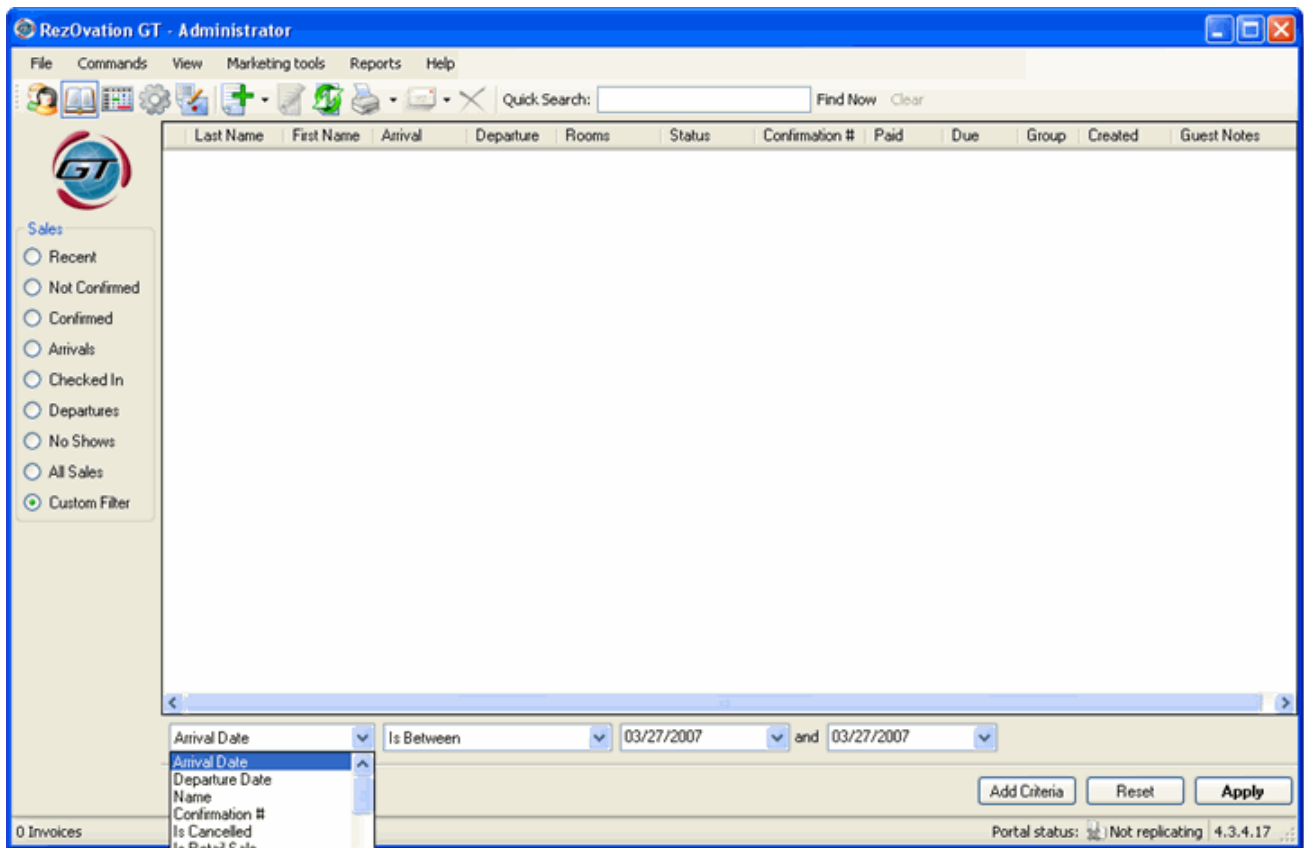
Arrival Date
Rooms
Confirmation Number
Group Name

Type any portions of the information you are looking for and click **Find Now**. The list will show only those records that match the criteria you entered.

Viewing Reservations with Filters

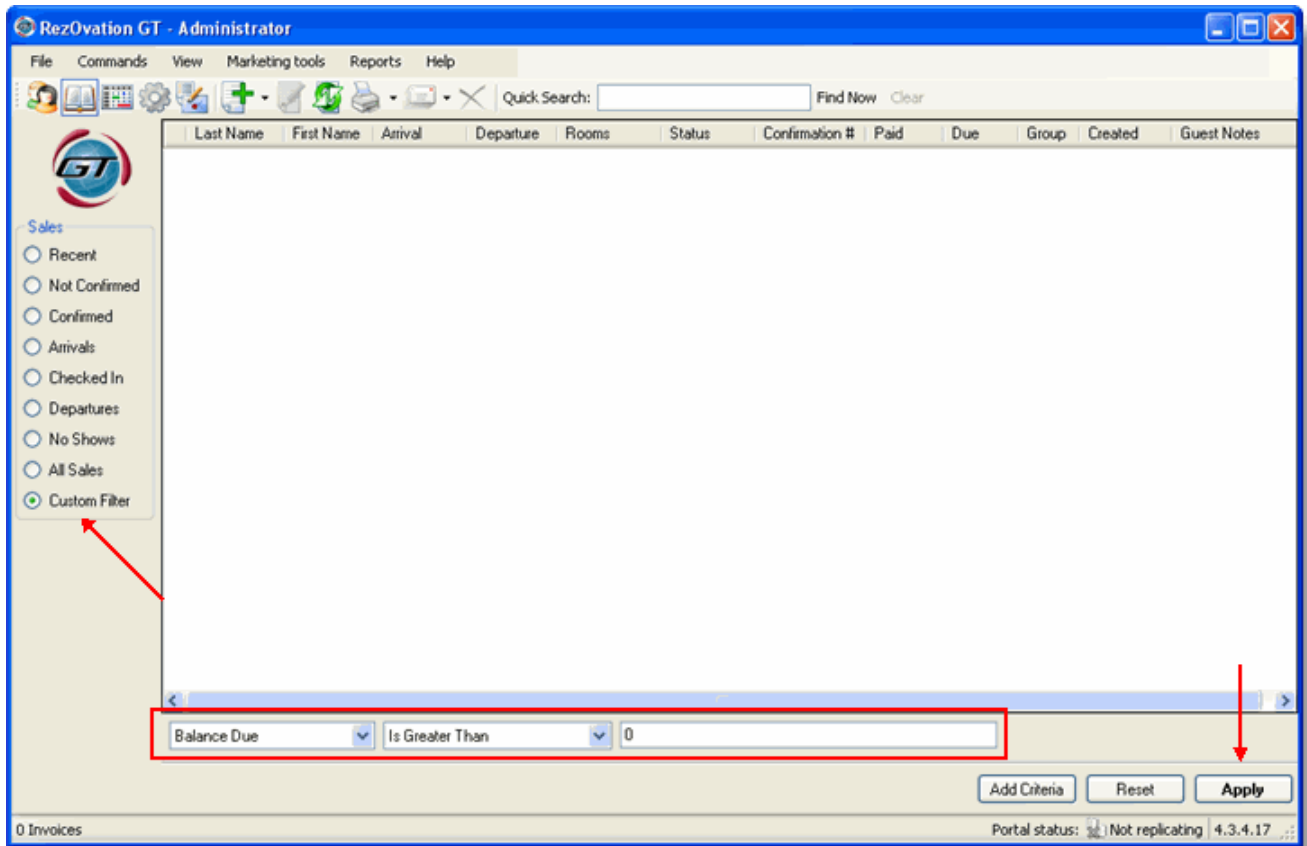
You can view reservations according to preset criteria called filters. For example, to view reservations for guest who will arrive today, select the radio button next to Arrivals.

You can also set up your own criteria for viewing reservations by using a custom filter. Perhaps you want to view all guests for a particular check in date. Select the radio button next to Custom Filter to display the custom filter at the bottom of the window.



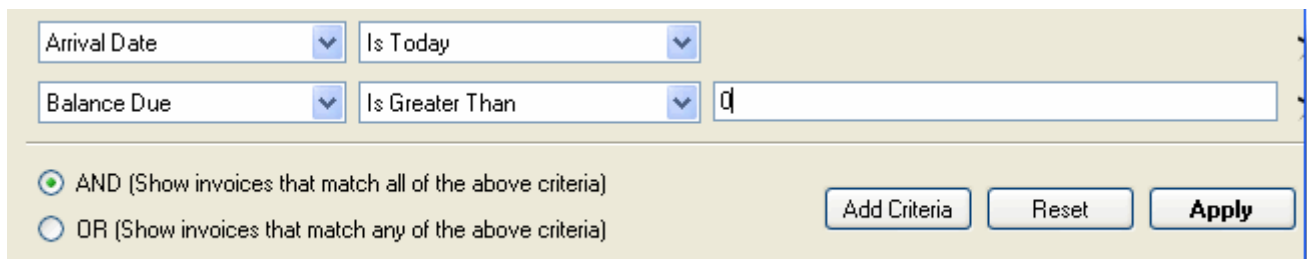
The left side drop-down box contains a list of fields for which you can set criteria. The middle drop-down box will automatically list the relevant choices for operators. The right side box is where you set the value.

To select all reservations for which a balance is due, select Balance Due from the left drop-down list, "Is Greater Than" from the middle drop-down list and type a zero in the right box. Click **Apply** and the window will display a list of all reservations with a balance due.



If you add more criteria, you can select AND or OR. Use AND if you want your reservations records to match all of the criteria, use OR if the reservation record just needs to match any one of the criteria. To delete a criterion, click the X next to it. To clear and start over, click Reset. To use the criteria to display matching records, click **Apply**.

As another example, if you want to see all guests arriving today with a balance due, your criteria would look like the following:

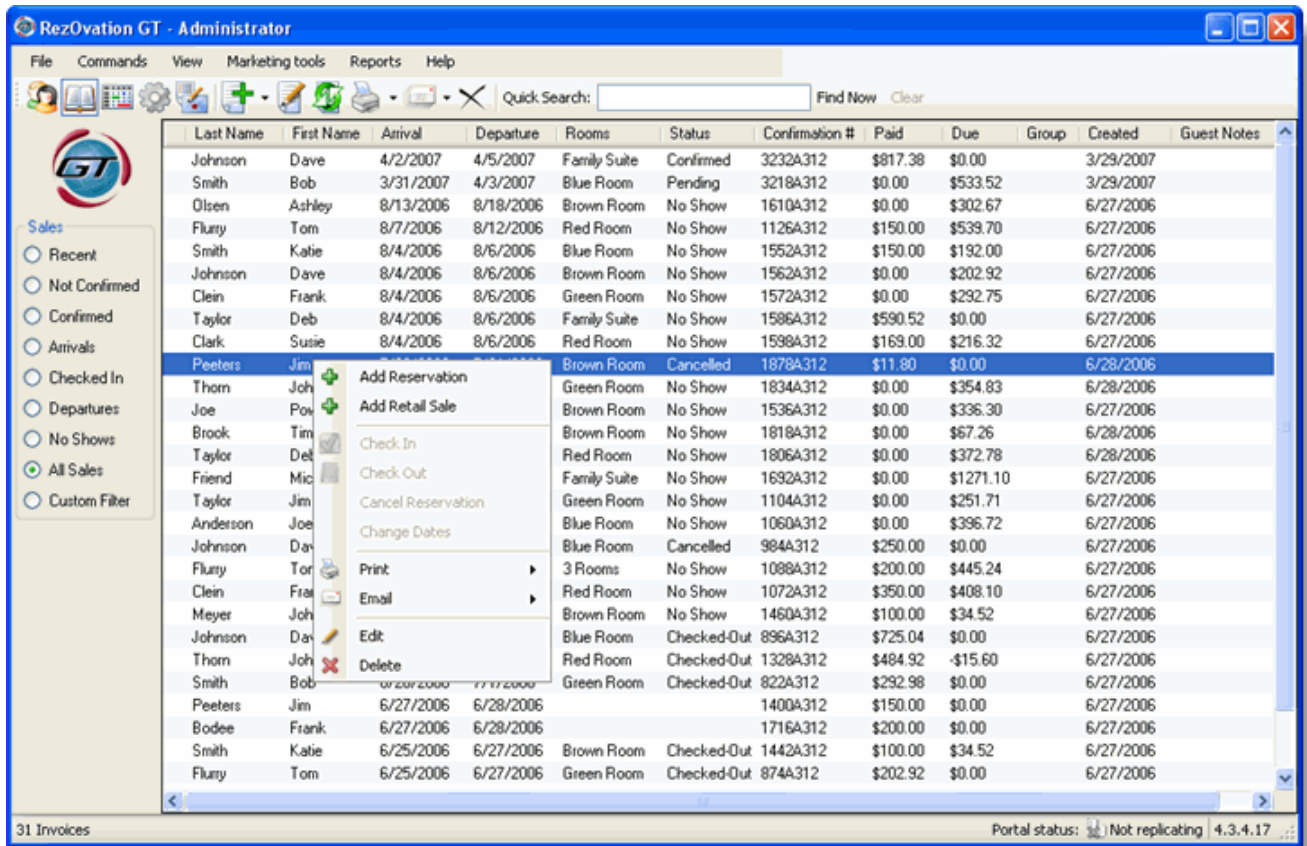


If you use Quick Search when a filter is active, the filtered list is further filtered by the last name entered in the Quick Search bar.

Right-Click Options

Right-click on a reservation to view a list of action options for that reservation.

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From here you can do the following:


- Add or edit reservations
- Add a room or an extra or package to a reservation
- Apply a payment, deposit, or refund to a reservation
- Select a credit card for payment
- Check guests in and out.
- Cancel or delete a reservation
- Change rooms or dates for a reservation
- View reservations using the occupancy map
- Manage out of service rooms
- Print and email reservations information

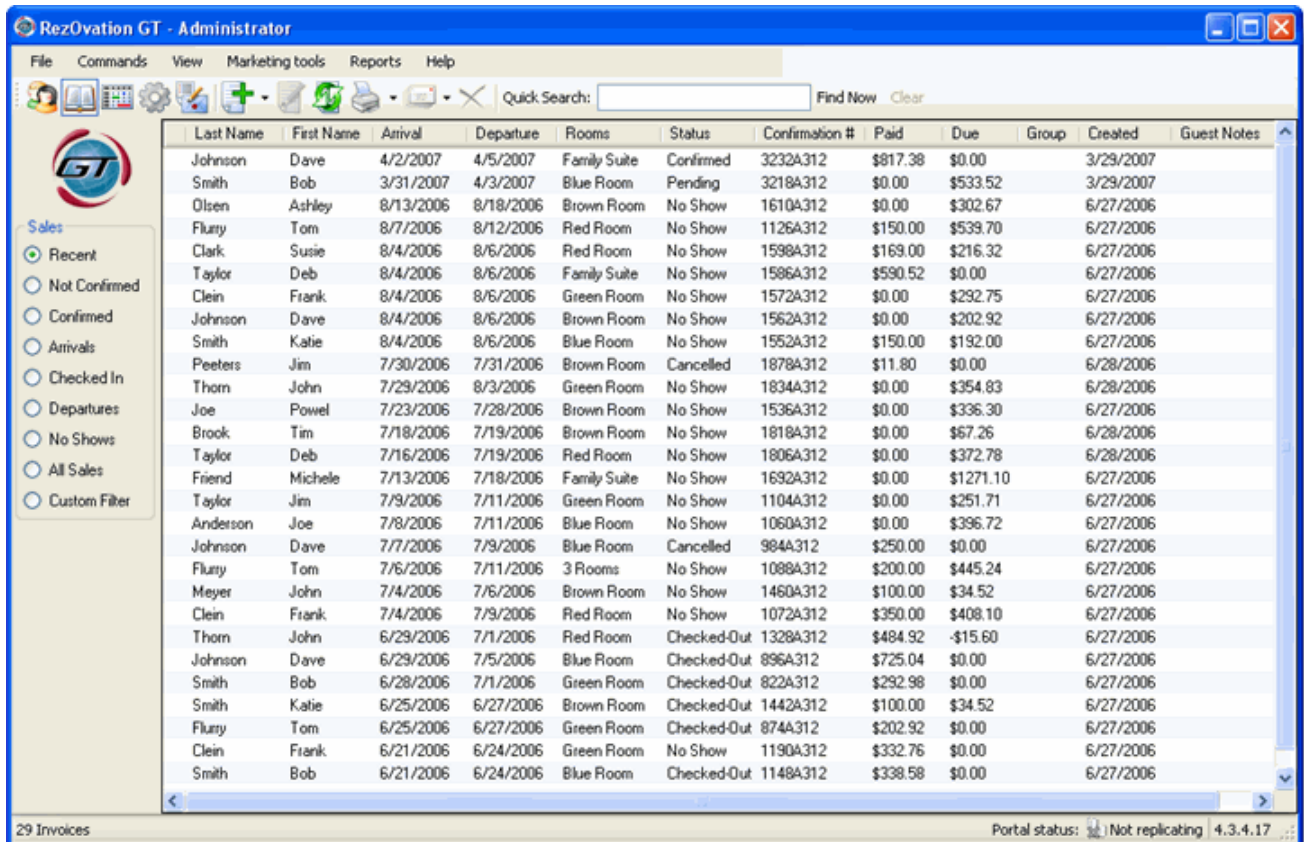
Retail sales are added to the customer record, not to the reservation record.

Creating and Editing a Reservation

You can add or edit reservations via the Reservations window or the Add Customer window. You can also add (but not edit) a reservation from the Occupancy Map.


To access reservations from the reservations window:

1. Click the **Reservations and Sales** icon  or select **View > Reservations and Sales** from the menu to display the Reservations window.



The screenshot shows the RezOvation GT - Administrator window. The main area displays a table of reservations with the following columns: Last Name, First Name, Arrival, Departure, Rooms, Status, Confirmation #, Paid, Due, Group, Created, and Guest Notes. The table contains 30 rows of reservation data. On the left side, there is a 'Sales' filter menu with options: Recent (selected), Not Confirmed, Confirmed, Arrivals, Checked In, Departures, No Shows, All Sales, and Custom Filter. The bottom status bar shows '29 Invoices' and 'Portal status: Not replicating 4.3.4.17'.

Last Name	First Name	Arrival	Departure	Rooms	Status	Confirmation #	Paid	Due	Group	Created	Guest Notes
Johnson	Dave	4/2/2007	4/5/2007	Family Suite	Confirmed	3232A312	\$817.38	\$0.00		3/29/2007	
Smith	Bob	3/31/2007	4/3/2007	Blue Room	Pending	3218A312	\$0.00	\$533.52		3/29/2007	
Olsen	Ashley	8/13/2006	8/18/2006	Brown Room	No Show	1610A312	\$0.00	\$302.67		6/27/2006	
Flury	Tom	8/7/2006	8/12/2006	Red Room	No Show	1126A312	\$150.00	\$539.70		6/27/2006	
Clark	Susie	8/4/2006	8/6/2006	Red Room	No Show	1598A312	\$169.00	\$216.32		6/27/2006	
Taylor	Deb	8/4/2006	8/6/2006	Family Suite	No Show	1586A312	\$590.52	\$0.00		6/27/2006	
Clein	Frank	8/4/2006	8/6/2006	Green Room	No Show	1572A312	\$0.00	\$292.75		6/27/2006	
Johnson	Dave	8/4/2006	8/6/2006	Brown Room	No Show	1562A312	\$0.00	\$202.92		6/27/2006	
Smith	Katie	8/4/2006	8/6/2006	Blue Room	No Show	1552A312	\$150.00	\$192.00		6/27/2006	
Peeters	Jim	7/30/2006	7/31/2006	Brown Room	Cancelled	1878A312	\$11.80	\$0.00		6/28/2006	
Thorn	John	7/29/2006	8/3/2006	Green Room	No Show	1834A312	\$0.00	\$354.83		6/28/2006	
Joe	Powel	7/23/2006	7/28/2006	Brown Room	No Show	1536A312	\$0.00	\$336.30		6/27/2006	
Brook	Tim	7/18/2006	7/19/2006	Brown Room	No Show	1818A312	\$0.00	\$67.26		6/28/2006	
Taylor	Deb	7/16/2006	7/19/2006	Red Room	No Show	1806A312	\$0.00	\$372.78		6/28/2006	
Friend	Michele	7/13/2006	7/18/2006	Family Suite	No Show	1692A312	\$0.00	\$1271.10		6/27/2006	
Taylor	Jim	7/9/2006	7/11/2006	Green Room	No Show	1104A312	\$0.00	\$251.71		6/27/2006	
Anderson	Joe	7/8/2006	7/11/2006	Blue Room	No Show	1060A312	\$0.00	\$396.72		6/27/2006	
Johnson	Dave	7/7/2006	7/9/2006	Blue Room	Cancelled	984A312	\$250.00	\$0.00		6/27/2006	
Flury	Tom	7/6/2006	7/11/2006	3 Rooms	No Show	1088A312	\$200.00	\$445.24		6/27/2006	
Meyer	John	7/4/2006	7/6/2006	Brown Room	No Show	1460A312	\$100.00	\$34.52		6/27/2006	
Clein	Frank	7/4/2006	7/9/2006	Red Room	No Show	1072A312	\$350.00	\$408.10		6/27/2006	
Thorn	John	6/29/2006	7/1/2006	Red Room	Checked-Out	1328A312	\$484.92	-\$15.60		6/27/2006	
Johnson	Dave	6/29/2006	7/5/2006	Blue Room	Checked-Out	896A312	\$725.04	\$0.00		6/27/2006	
Smith	Bob	6/28/2006	7/1/2006	Green Room	Checked-Out	822A312	\$292.98	\$0.00		6/27/2006	
Smith	Katie	6/25/2006	6/27/2006	Brown Room	Checked-Out	1442A312	\$100.00	\$34.52		6/27/2006	
Flury	Tom	6/25/2006	6/27/2006	Green Room	Checked-Out	874A312	\$202.92	\$0.00		6/27/2006	
Clein	Frank	6/21/2006	6/24/2006	Green Room	No Show	1190A312	\$332.76	\$0.00		6/27/2006	
Smith	Bob	6/21/2006	6/24/2006	Blue Room	Checked-Out	1148A312	\$338.58	\$0.00		6/27/2006	

2. Click the **Add** button  to display the Add Reservation window or select **Commands > Add > Reservation** from the menu..


3. Define the following information:

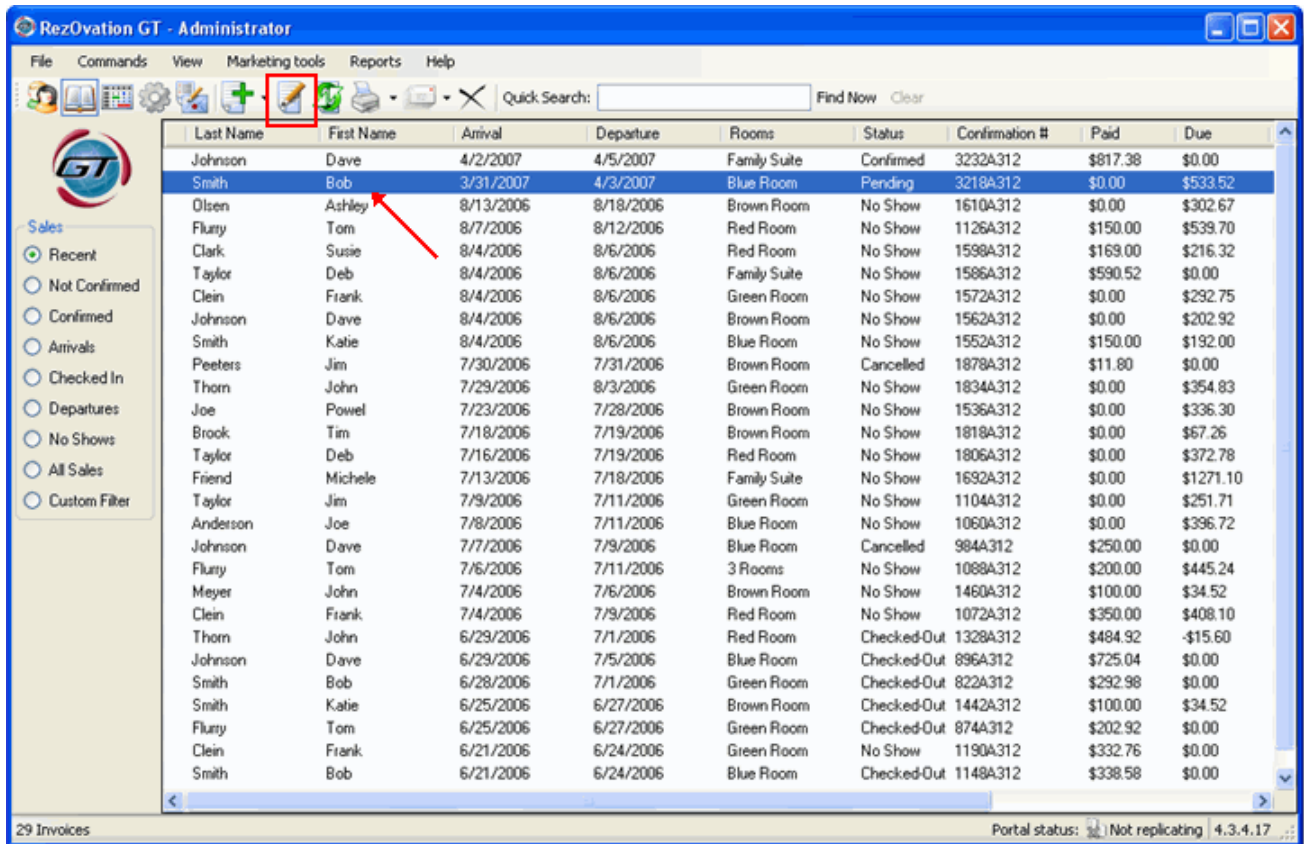
- **Arrival Date** - click the down arrow to select a date from the calendar.
- **Departure Date** - click the down arrow to select a date from the calendar.
- **Primary Guest Name** - begin typing the last name or first name to populate the name fields with an existing customer. To add a new customer, click Create New to access the Add Customer window.
- **Taken By** - type the name of the person who took the reservation.
- **Group Name** - enter a name for the group if the reservation is part of a group reservation. If a Group Name is entered, the Occupancy Map will display the name of the group rather than the Primary Guest Name.
- **Source** - select the referral source from the drop-down list. If the referral source is not on the list, click Source to set up a new referral source.
- **Reason for Stay** - select the reason for stay from the drop-down list. If the reason for stay is not on the list, click Reason for Stay to set up a new reason.
- Custom Fields and Checkboxes - if you set up any user defined fields or checkboxes make the appropriate selections for the reservation.
- **Guest Notes** - add any notes about the guest or reservation.
- **Internal Staff Notes** - add any notes for staff about the reservation.

Once the basic information for the reservation is entered you can do the following:

- Add a room - this is where you set the number of adults and number of children.
- Add a package or an extra
- Add a deposit, payment, or refund
- Add correspondence
- Print or email confirmations

To edit a reservation:

1. Highlight the reservation on the reservation window and click the **Edit** button  or right-click and select **Edit**.



OR

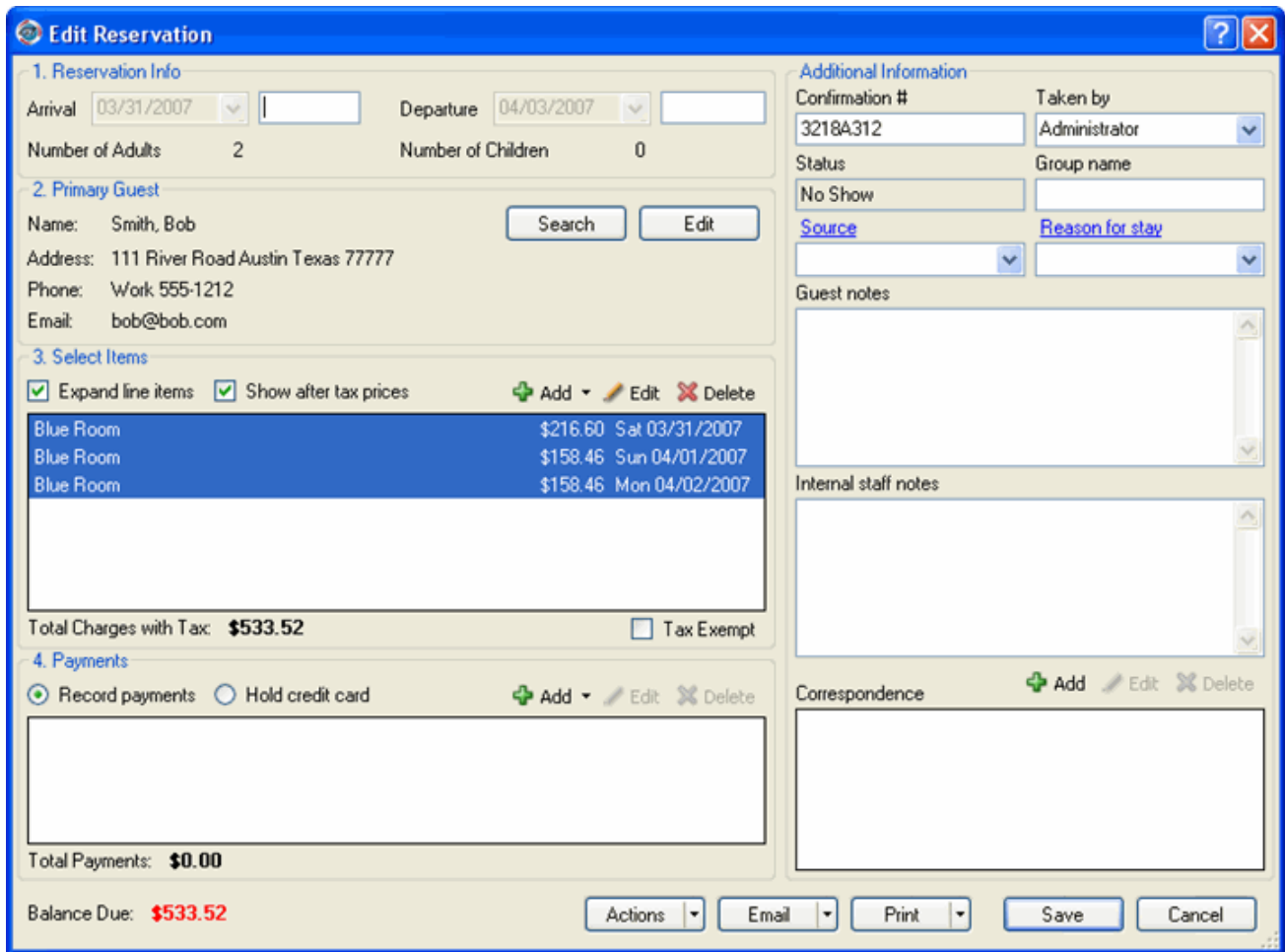
RezOvation GT Quick Start Guide

Last Name	First Name	Arrival	Departure	Rooms	Status	Confirmation #	Paid	Due
Johnson	Dave	4/2/2007	4/5/2007	Family Suite	Confirmed	3232A312	\$817.38	\$0.00
Smith	Bob	4/2/2007	4/2/2007	Blue Room	Pending	3218A312	\$0.00	\$533.52
Olsen	Ashley			Brown Room	No Show	1610A312	\$0.00	\$302.67
Fluny	Tom			Red Room	No Show	1126A312	\$150.00	\$539.70
Clark	Susie			Red Room	No Show	1598A312	\$169.00	\$216.32
Taylor	Deb			Family Suite	No Show	1586A312	\$590.52	\$0.00
Clein	Frank			Green Room	No Show	1572A312	\$0.00	\$292.75
Johnson	Dave			Brown Room	No Show	1562A312	\$0.00	\$202.92
Smith	Katie			Blue Room	No Show	1552A312	\$150.00	\$192.00
Peeters	Jim			Brown Room	Cancelled	1878A312	\$11.80	\$0.00
Thom	John			Green Room	No Show	1834A312	\$0.00	\$354.83
Joe	Powel			Brown Room	No Show	1536A312	\$0.00	\$336.30
Brook	Tim			Brown Room	No Show	1818A312	\$0.00	\$67.26
Taylor	Deb			Red Room	No Show	1806A312	\$0.00	\$372.78
Friend	Michele			Family Suite	No Show	1692A312	\$0.00	\$1271.10
Taylor	Jim			Green Room	No Show	1104A312	\$0.00	\$251.71
Anderson	Joe	7/8/2006	7/11/2006	Blue Room	No Show	1060A312	\$0.00	\$396.72
Johnson	Dave	7/7/2006	7/9/2006	Blue Room	Cancelled	984A312	\$250.00	\$0.00
Fluny	Tom	7/6/2006	7/11/2006	3 Rooms	No Show	1088A312	\$200.00	\$445.24
Meyer	John	7/4/2006	7/6/2006	Brown Room	No Show	1460A312	\$100.00	\$34.52
Clein	Frank	7/4/2006	7/9/2006	Red Room	No Show	1072A312	\$350.00	\$408.10
Thom	John	6/29/2006	7/1/2006	Red Room	Checked-Out	1328A312	\$484.92	-\$15.60
Johnson	Dave	6/29/2006	7/5/2006	Blue Room	Checked-Out	896A312	\$725.04	\$0.00
Smith	Bob	6/28/2006	7/1/2006	Green Room	Checked-Out	822A312	\$292.98	\$0.00
Smith	Katie	6/25/2006	6/27/2006	Brown Room	Checked-Out	1442A312	\$100.00	\$34.52
Fluny	Tom	6/25/2006	6/27/2006	Green Room	Checked-Out	874A312	\$202.92	\$0.00
Clein	Frank	6/21/2006	6/24/2006	Green Room	No Show	1190A312	\$332.76	\$0.00
Smith	Bob	6/21/2006	6/24/2006	Blue Room	Checked-Out	1148A312	\$338.58	\$0.00



You can highlight the reservation and double-click the left mouse button to access the Edit Reservation window, or you can highlight the reservation and select **Commands > Edit** from the menu.

The Edit Reservation window will appear.



2. From here you can do the following:

- Edit the primary guest by clicking the Edit button next to the guest's name.
- Change the primary guest by clicking the Search button. When you click the search button you will also have the option of creating a new guest.



If you click the Search button, the guest info will disappear. To restore the guest information either click the ESC key to return to the reservation list where you can try to edit the reservation again, or type the name of the guest in the search box to put the guest's name back on the reservation.

- You can expand items in the lodging and extras section to view more details such as each night of stay.

RezOvation GT Quick Start Guide

3. Select Items

Expand line items Show after tax prices + Add ▾ ✎ Edit ✕ Delete

Austin	\$498.75	3/8/2006 - 3/10/2006	Curtis Daley
--------	----------	----------------------	--------------

Lodging not expanded

Total Charges with Tax: **\$498.75** Tax Exempt

Click the **Expand items** box.

3. Select Items

Expand line items Show after tax prices + Add ▾ ✎ Edit ✕ Delete

Austin	\$157.50	Wed 03/08/2006	Curtis Daley
Austin	\$157.50	Thu 03/09/2006	Curtis Daley
Austin	\$183.75	Fri 03/10/2006	Curtis Daley

Lodging expanded

Total Charges with Tax: **\$498.75** Tax Exempt

You can also handle the following tasks:

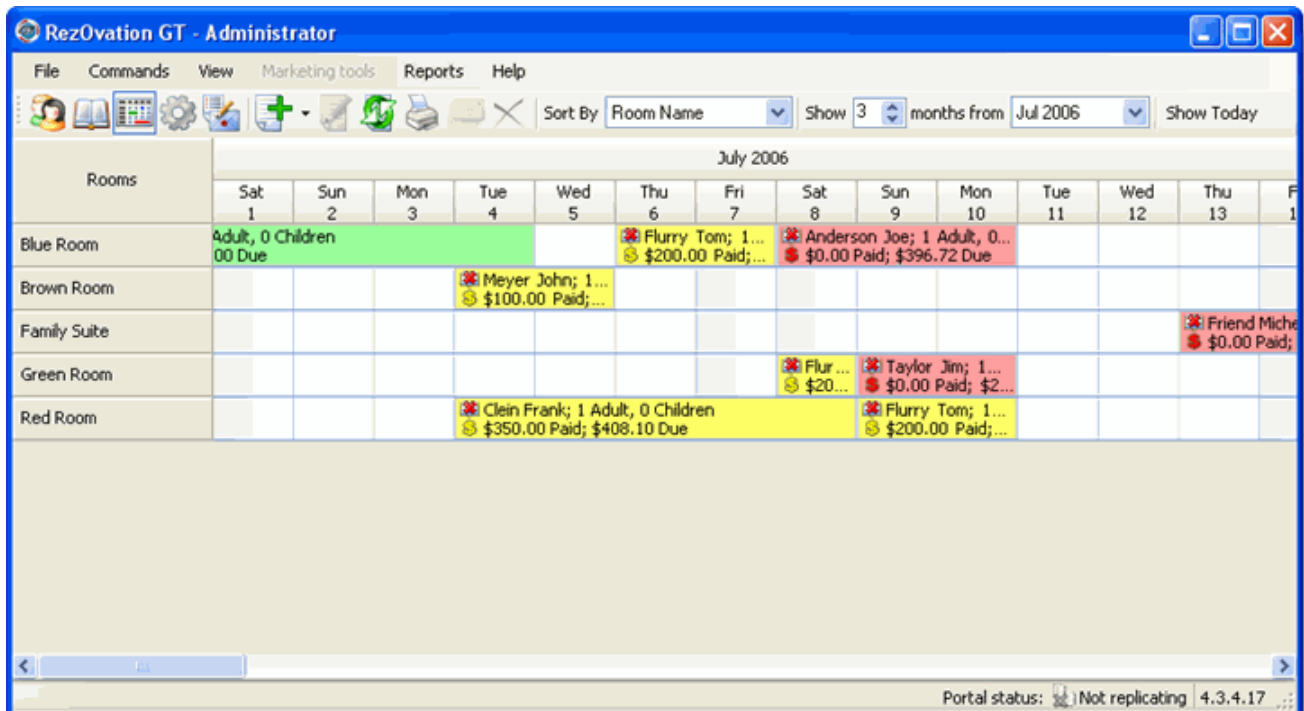
- Add a room
- Add a package or an extra
- Add a deposit, payment, or refund
- Add correspondence
- Check the guest in or out
- Cancel the reservation
- Delete the reservation
- Change the rooms on the reservation
- Change the dates for the reservation
- Print or email reservations information

Using the Occupancy Map

The occupancy map allows you to view your rooms and reservations (for up to two years in the future) along with payment status, arrivals and departures. You can also add a reservation from the occupancy map, move a reservation to a different room, and print the occupancy map.

To access the Occupancy Map:

Click the **Occupancy Map** icon  or select **View > Occupancy Map** from the main menu to display the Occupancy Map.



About the Occupancy Map

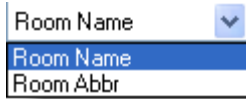
You can select the number of months to display and the month on which to begin displaying. For example, if you want to see four months of occupancy information beginning in May 2006 your selection at the top of the occupancy map will look like the following:











You can also click the Show Today button to set the view to begin at two days before today's date.

You can sort by room name or by room abbreviation.

RezOvation GT Quick Start Guide



The icons on the occupancy map indicate the following:

	Reservation made
	Guest checked in
	Guest checked out
	No payment received
	Deposit received
	Paid in full
	Double booking
	No show

If the cells in your Occupancy Map are not color coded to indicate payment status, you can enable the display of payment status color bands from the Configuration window.

Use the horizontal scroll bar to navigate through dates.

To book a room using the occupancy map:

1. Select a date or date range for a room by dragging the mouse over the appropriate date boxes with the left mouse button depressed.

When you release the left mouse button, there will be a slight pause and then the Reservation window for the particular room will appear.

Reserve King Room, arrival 5/8/2006, 2 nights

1. Select Guests
 # Adults # Children To assign guests by name, [click here](#).

2. Select Rate
 (When you change this selection, the rates and adjustments below will be recalculated)

3. Adjust Rate
 No adjustment
 % Discount
 \$ Discount
 Flat rate per night
 Override each night manually

4. Select Room
 Show Lodging Packages

Rooms	May 2006	
	Mon 8	Tue 9
King Room	\$110.00	\$110.00
Queen Room	\$90.00	\$90.00

Total: \$220.00 (\$220.00 + \$0.00 taxes)

2. Add a guest as follows:

Select the guests for the room. You can add a guest now, or you can add a guest after you book the room. (When you click **Book**, the Add Reservation window will appear - you can add a guest from there). If you decide to add a guest now:

- a. Click **click here** in the Select Guests section of the window to add a guest.

RezOvation GT Quick Start Guide

1. Select Guests
Adults # Children To assign guests by name, [click here.](#)

2. Select Rate
Rack (When you change this selection, the rates and adjustments below will be recalculated)

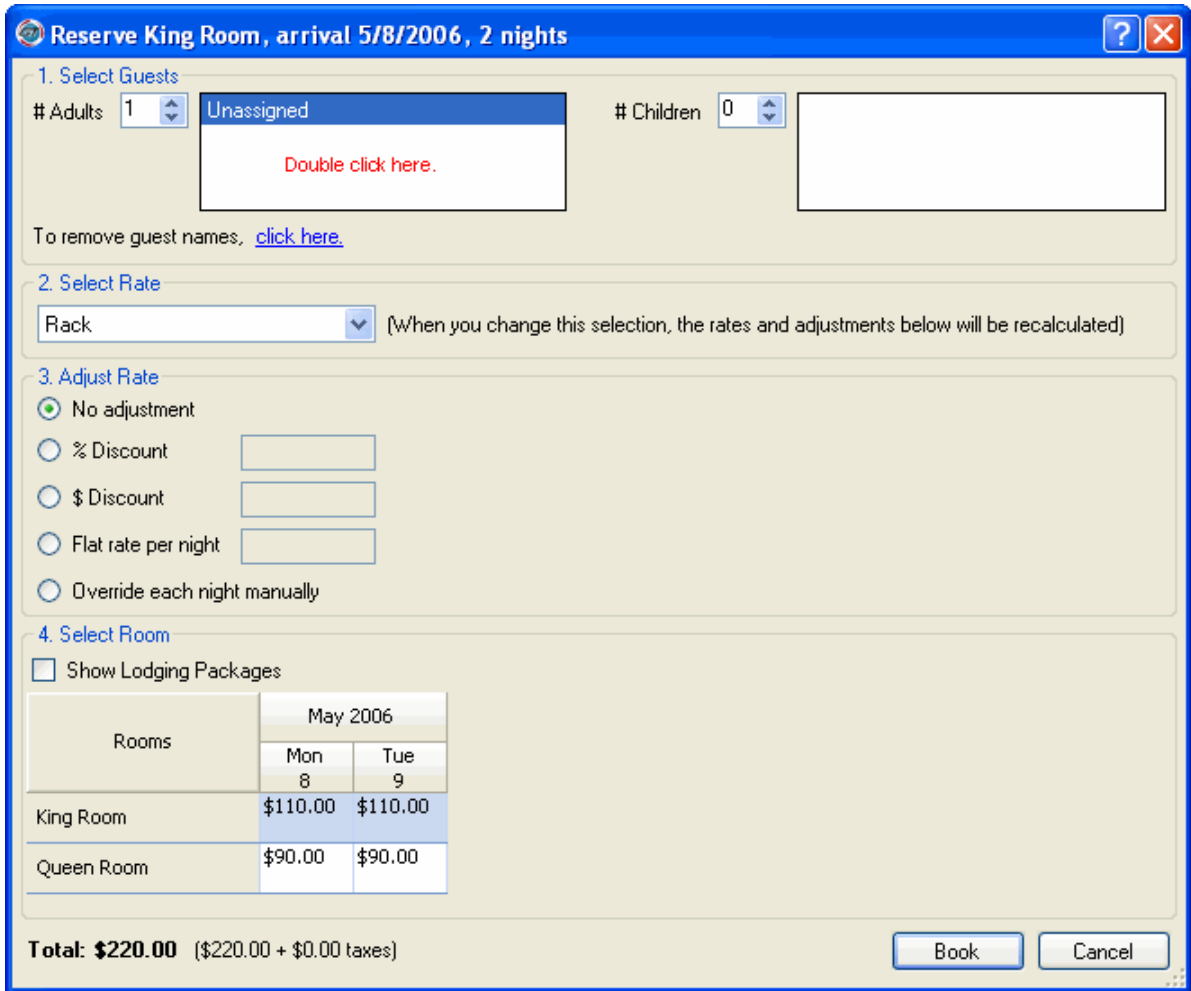
3. Adjust Rate
 No adjustment
 % Discount
 \$ Discount
 Flat rate per night
 Override each night manually

4. Select Room
 Show Lodging Packages

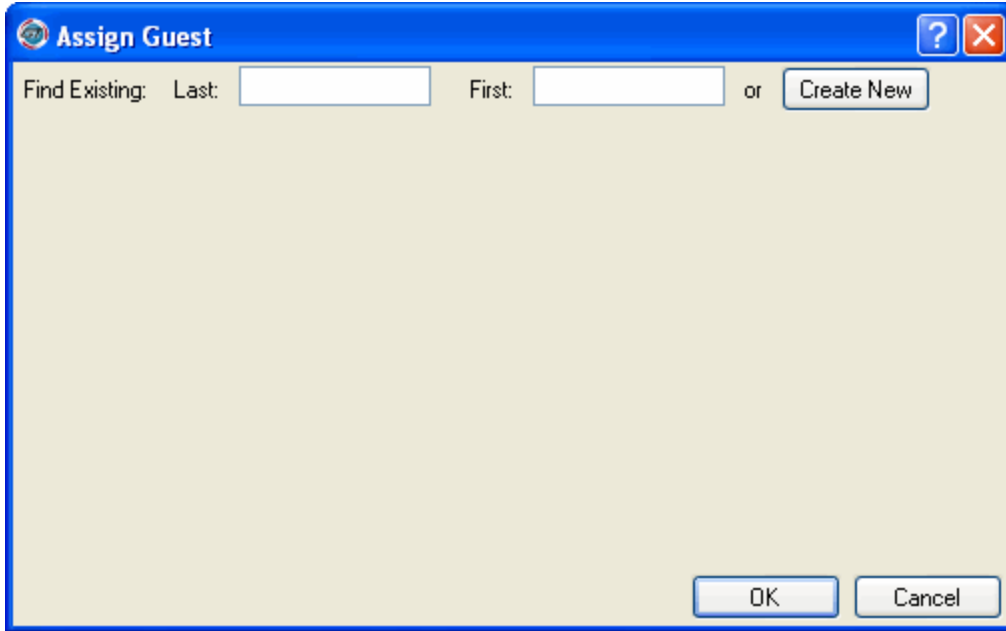
Rooms	May 2006	
	Mon 8	Tue 9
King Room	\$110.00	\$110.00
Queen Room	\$90.00	\$90.00

Total: \$220.00 (\$220.00 + \$0.00 taxes)

The Select Guests section of the window will change as indicated below.



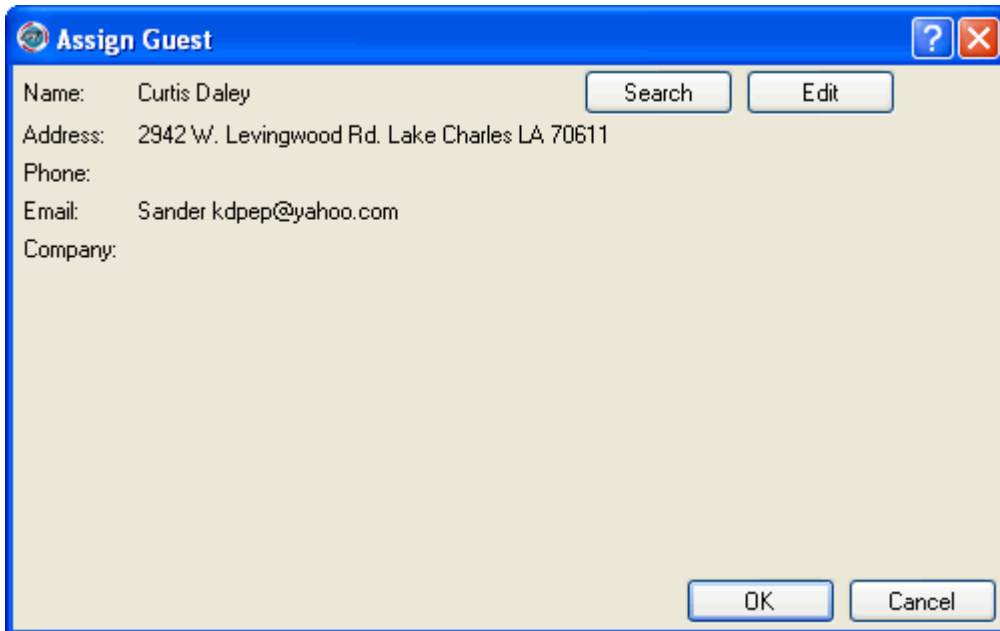
b. Double click in the guests box to display the Assign Guest window.



- c. Begin typing in either the last name or first name field to bring up a list of guests beginning with that letter.

- d. Click the guest name to select it.

The guest's information will appear.



- e. Click **OK** to accept the guest or **Edit** to [edit](#) the guest's information.

When you click **OK**, you will return to the Reservation window and the guest's name will appear in the Select Guest section of the window.

Reserve King Room, arrival 5/8/2006, 2 nights

1. Select Guests
 # Adults: 1 | Curtis Daley | # Children: 0

To remove guest names, [click here](#).

2. Select Rate
 Rack (When you change this selection, the rates and adjustments below will be recalculated)

3. Adjust Rate
 No adjustment
 % Discount
 \$ Discount
 Flat rate per night
 Override each night manually

4. Select Room
 Show Lodging Packages

Rooms	May 2006	
	Mon 8	Tue 9
King Room	\$110.00	\$110.00
Queen Room	\$90.00	\$90.00

Total: \$220.00 (\$220.00 + \$0.00 taxes)

Book Cancel

3. Complete the rest of the information for the reservation as follows:
 - Select the number of adults and number of children.
 - Select the rate at which to book the room from the rate drop-down list.
 - Adjust the rate if necessary.
 - % discount - apply a discount percentage
 - \$ discount - apply a dollar amount discount
 - Flat rate per night - change the rate to a certain amount per night (not enabled for packages)
 - Override each night manually - displays a grid where you can enter a different rate for each night of stay (not enabled for packages)
 - You can also click **Show Lodging Packages** to view available lodging packages for the date(s).

Reserve King Room, arrival 5/8/2006, 2 nights

1. Select Guests
 # Adults: 1 (Curtis Daley) # Children: 0

2. Select Rate
 Rack (When you change this selection, the rates and adjustments below will be recalculated)

3. Adjust Rate
 No adjustment
 % Discount
 \$ Discount
 Flat rate per night
 Override each night manually

4. Select Room
 Show Lodging Packages

Rooms	May 2006	
	Mon 8	Tue 9
King Room	\$110.00	\$110.00
3 Day Weekend	\$375.00	
	\$475.00	

Total: \$220.00 (\$220.00 + \$0.00 taxes)

Buttons: Book, Cancel

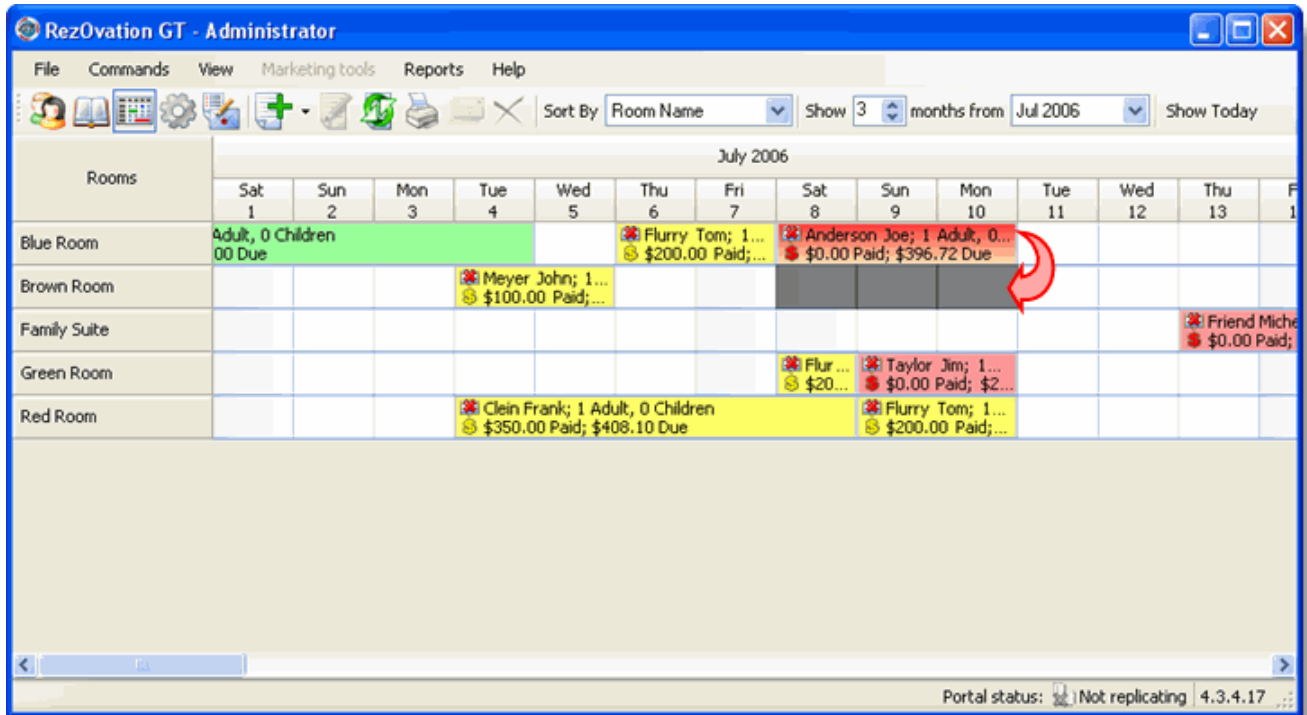
Note: Use scroll bar to view all available packages.

4. Click **Book** to book the room.

The Add Reservation window will appear where you can add additional information about the reservation.

To change rooms using the occupancy map:

Click the reservation and drag it to the new room.

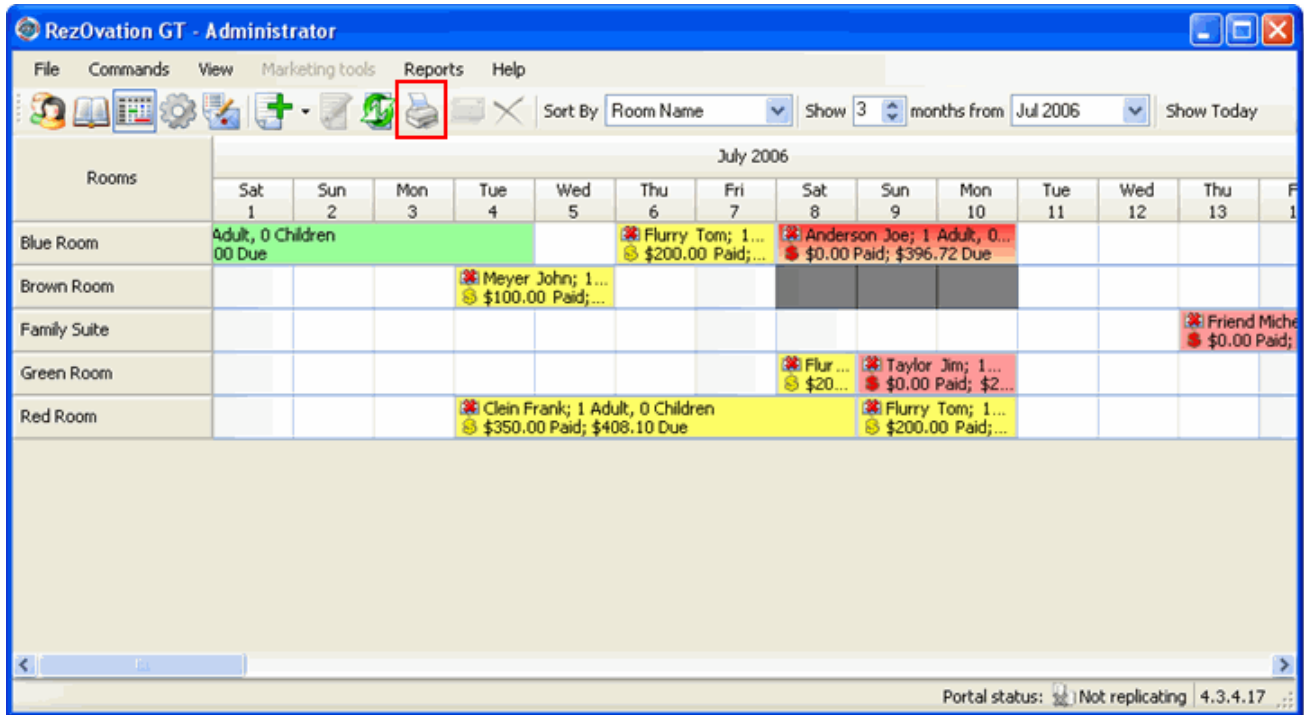


Reservation dates cannot be changed when changing rooms. You can change rooms via the occupancy map only when keeping the same dates.

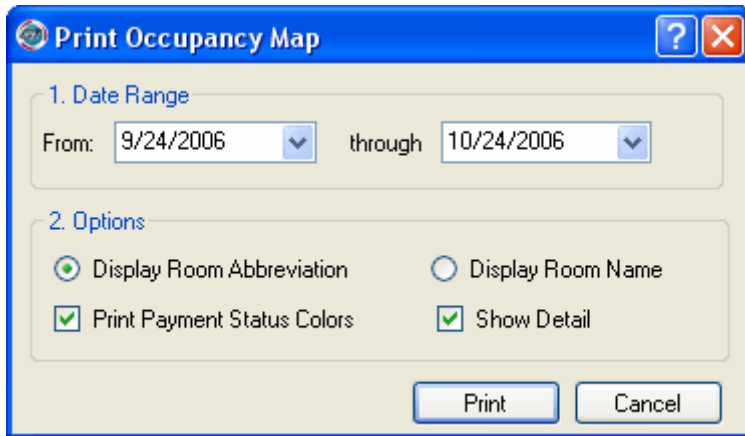
To print the Occupancy Map:

1. Click the **Print** icon.

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The following window will appear.



2. Select the date range to print, and select any options.

A copy of the occupancy map will generate in Excel. If you do not have Excel, it will generate an HTML page and display in your web browser.

Microsoft Excel - tmp2D.tmp.htm

File Edit View Insert Format Tools Data Window Help

SnagIt Window

A1 Occupancy for July 1 - July 31

	A	B	C	D	E	F	G	H	I	J	K	L
1	Occupancy for July 1 - July 31											
2												
3												July 200
4		Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue
5		1	2	3	4	5	6	7	8	9	10	11
6		Johnson Dave 1 Adult, 0 Children \$725.04 Paid; \$0.00 Due							Anderson Joe 1 Adult, 0 Children \$0.00 Paid; \$396.72 Due			
7	Blue Room											
8												
9												
10	Brown Room				Meyer John 1 Adult, 0 Children \$100.00 Paid; \$34.52 Due		Flurry Tom 1 Adult, 0 Children \$200.00 Paid; \$445.24 Due					
11												
12	Family Suite											
13												
14												
15												
16	Green Room								Flurry Tom 1 Adult, 0 Children \$200.00 Paid; \$445.24 Due	Taylor Jim 1 Adult, 0 Children \$0.00 Paid; \$251.71 Due		
17												
18												
19	Red Room				Clein Frank 1 Adult, 0 Children \$350.00 Paid; \$408.10 Due				Flurry Tom 1 Adult, 0 Children \$200.00 Paid; \$445.24 Due			
20												
21												


Occupancy Map

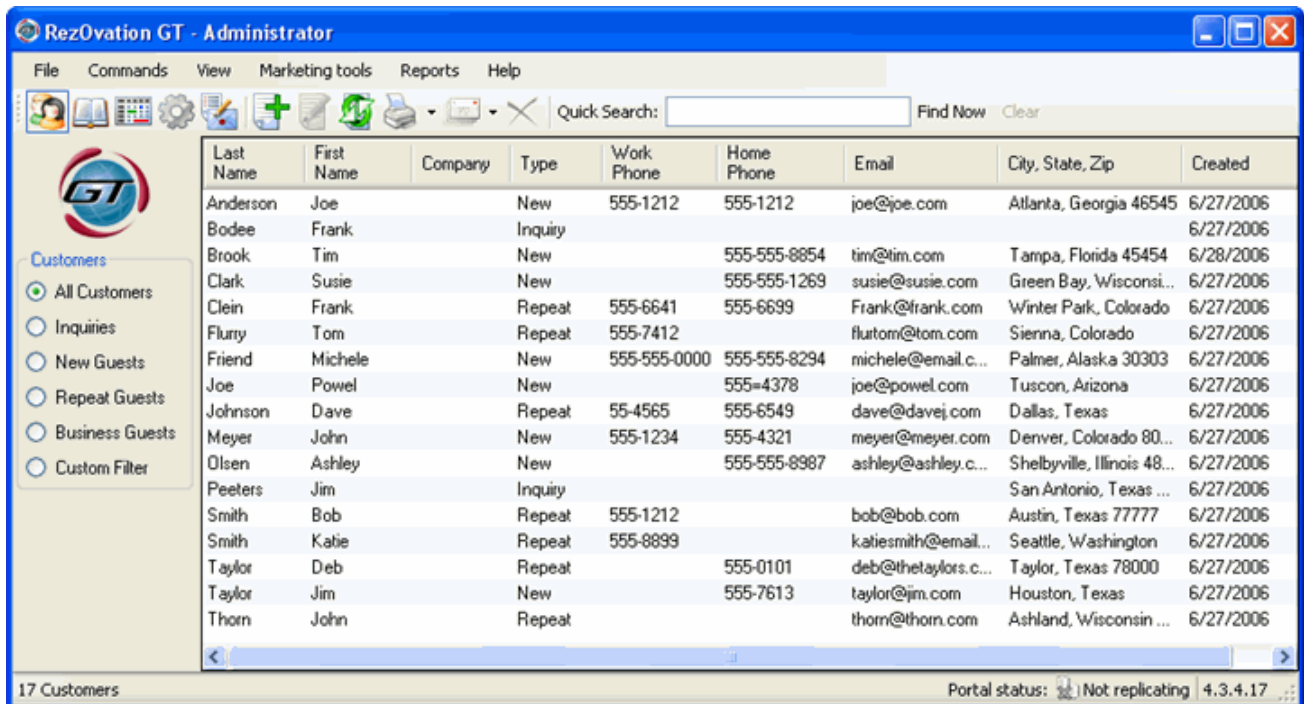
Ready

The Customer List

The customer list allows you to track inquiries, new and repeat guests, and contacts. You can filter the list to help you in your marketing efforts or to generate lists of customers that meet certain criteria. You can also add, delete, and edit customer records from the customer list as well as add reservations.

To access the customer list window:

Click the **Show Customers** icon  or select **View > Customers** from the main menu to display the Customer List.



Last Name	First Name	Company	Type	Work Phone	Home Phone	Email	City, State, Zip	Created
Anderson	Joe		New	555-1212	555-1212	joe@joe.com	Atlanta, Georgia 46545	6/27/2006
Bodee	Frank		Inquiry					6/27/2006
Brook	Tim		New		555-555-8854	tim@tim.com	Tampa, Florida 45454	6/28/2006
Clark	Susie		New		555-555-1269	susie@susie.com	Green Bay, Wisconsi...	6/27/2006
Clein	Frank		Repeat	555-6641	555-6699	Frank@frank.com	Winter Park, Colorado	6/27/2006
Flurry	Tom		Repeat	555-7412		flutom@tom.com	Sienna, Colorado	6/27/2006
Friend	Michele		New	555-555-0000	555-555-8294	michele@email.c...	Palmer, Alaska 30303	6/27/2006
Joe	Powel		New		555=4378	joe@powel.com	Tuscon, Arizona	6/27/2006
Johnson	Dave		Repeat	55-4565	555-6549	dave@davej.com	Dallas, Texas	6/27/2006
Meyer	John		New	555-1234	555-4321	meyer@meyer.com	Denver, Colorado 80...	6/27/2006
Olsen	Ashley		New		555-555-8987	ashley@ashley.c...	Shelbyville, Illinois 48...	6/27/2006
Peeters	Jim		Inquiry				San Antonio, Texas ...	6/27/2006
Smith	Bob		Repeat	555-1212		bob@bob.com	Austin, Texas 77777	6/27/2006
Smith	Katie		Repeat	555-8899		katiesmith@email...	Seattle, Washington	6/27/2006
Taylor	Deb		Repeat		555-0101	deb@thetaylors.c...	Taylor, Texas 78000	6/27/2006
Taylor	Jim		New		555-7613	taylor@jm.com	Houston, Texas	6/27/2006
Thorn	John		Repeat			thorn@thorn.com	Ashland, Wisconsin ...	6/27/2006

Using Quick Search

To quickly find a record use the Quick Search feature located at the top of the window.



You can search for values in the following fields:

- Last Name
- First Name
- Company
- Guest Type
- Home Phone

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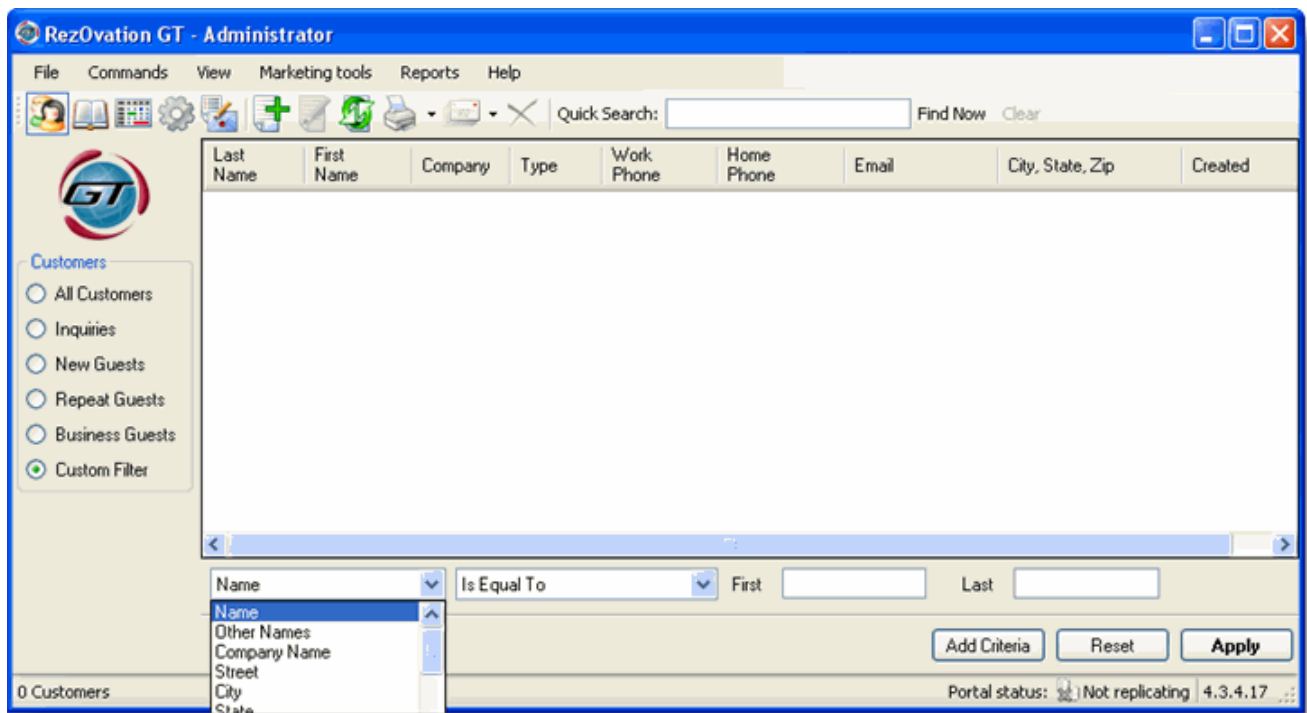
Email
City
State
Zip

Type any portions of the information you are looking for and click **Find Now**. The list will show only those records that match the criteria you entered.

Viewing Customers with Filters

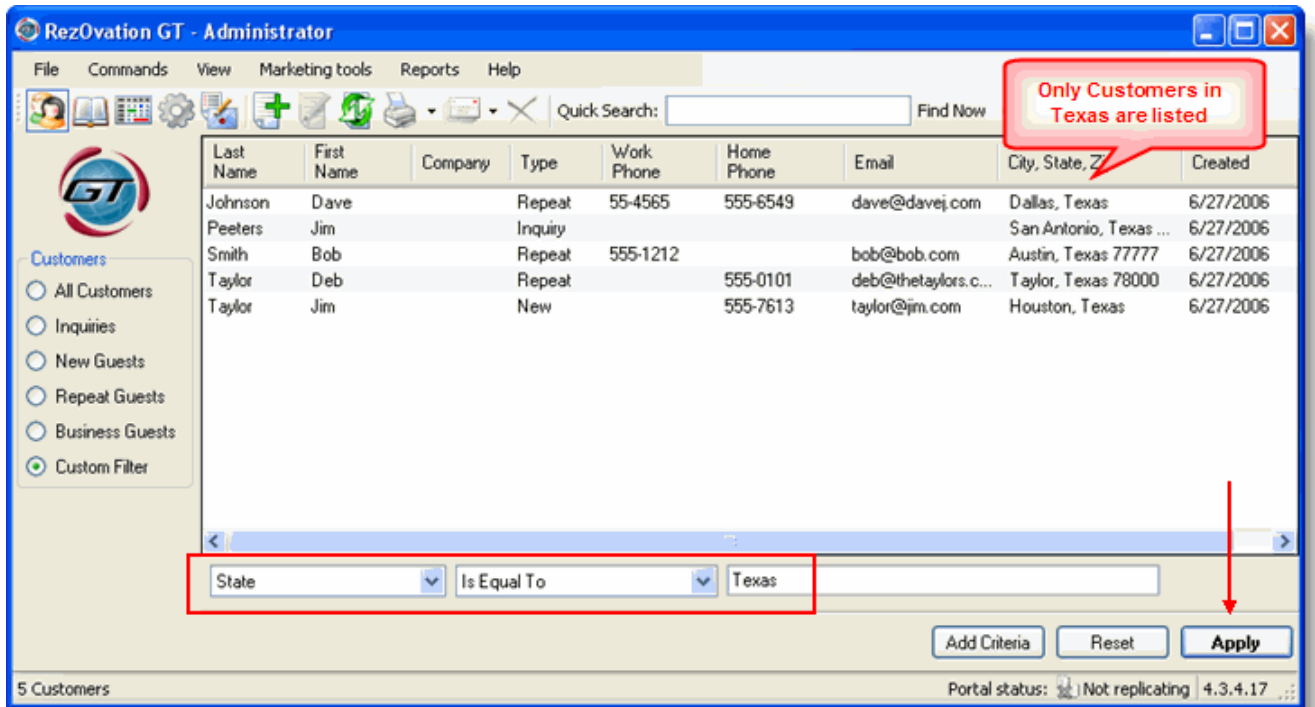
You can view customers according to preset criteria called filters. For example: to view customers that have stayed on your property more than once, select the radio button next to Repeat Guests.

You can also set up your own criteria for viewing guests by using a custom filter. Perhaps you want to view all guests from a particular state. Select the radio button next to Custom Filter to display the custom filter at the bottom of the window.



The left side drop-down box contains a list of fields for which you can set criteria. The middle drop-down box will automatically list the relevant choices for operators. The right side box is where you set the value.

For example, to select all customers from Texas, select State from the left drop down list, "Is Equal To" from the middle drop-down list and type "Texas" in the right box. Click **Apply** and the list will show only those customers from Texas.



If you want to add more criteria (perhaps customers in Texas AND having a particular interest), click **Add Criteria** and the bottom part of the window will display your choice and allow you to add more criteria.

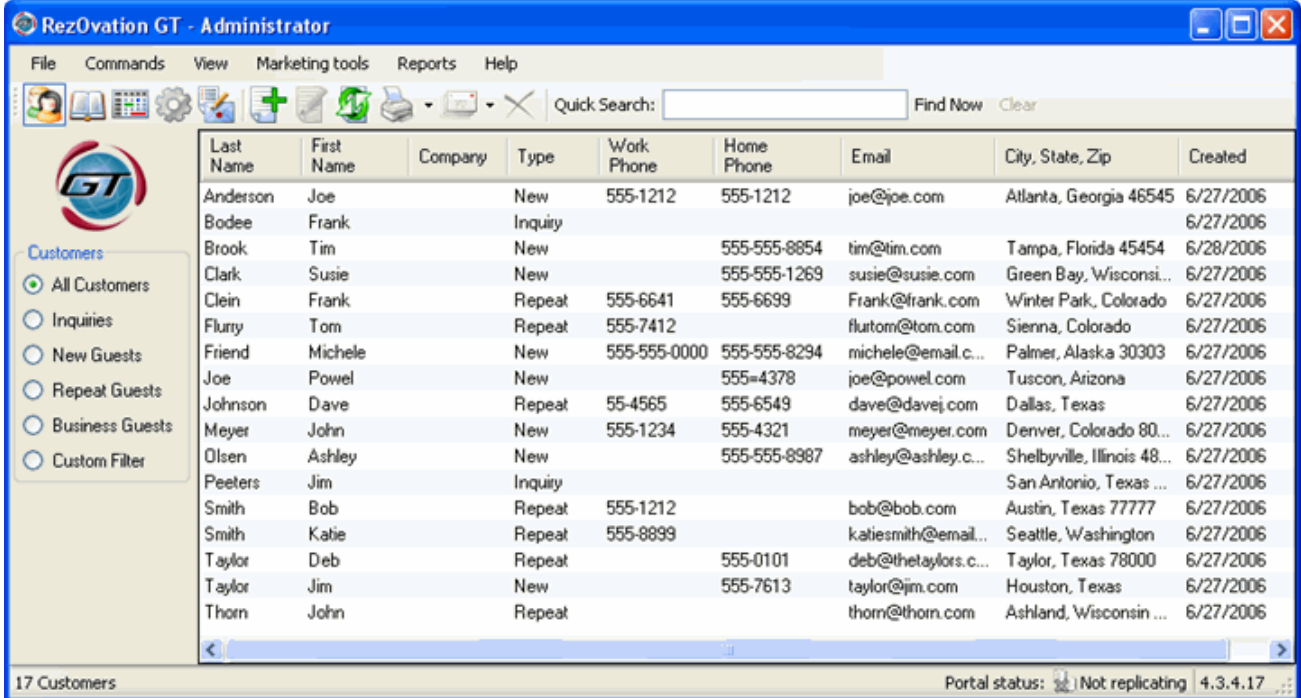
If you add more criteria, you can select AND or OR. Use AND if you want your customer records to match all of the criteria, use OR if the customer record just needs to match any one of the criteria. To delete a criterion, click the X next to it. To clear and start over, click **Reset**. To use the criteria to display matching records, click **Apply**.

From here you can do the following:

- Add or edit customers
- Add an occasion, interest, or correspondence to a customer record
- Add a reservation or a retail sale to a customer

Creating and Editing Customer Records

The task of adding and editing customers begins at the Customer List.



The screenshot shows the RezOvation GT - Administrator application window. The interface includes a menu bar (File, Commands, View, Marketing tools, Reports, Help), a toolbar with various icons, and a search bar labeled "Quick Search:". On the left, there is a "Customers" sidebar with radio buttons for "All Customers", "Inquiries", "New Guests", "Repeat Guests", "Business Guests", and "Custom Filter". The main area displays a table of customer records.

Last Name	First Name	Company	Type	Work Phone	Home Phone	Email	City, State, Zip	Created
Anderson	Joe		New	555-1212	555-1212	joe@joe.com	Atlanta, Georgia 46545	6/27/2006
Bodee	Frank		Inquiry					6/27/2006
Brook	Tim		New		555-555-8854	tim@tim.com	Tampa, Florida 45454	6/28/2006
Clark	Susie		New		555-555-1269	susie@susie.com	Green Bay, Wisconsi...	6/27/2006
Clein	Frank		Repeat	555-6641	555-6699	Frank@frank.com	Winter Park, Colorado	6/27/2006
Flurry	Tom		Repeat	555-7412		flutom@tom.com	Sienna, Colorado	6/27/2006
Friend	Michele		New	555-555-0000	555-555-8294	michele@email.c...	Palmer, Alaska 30303	6/27/2006
Joe	Powel		New		555-4378	joe@powel.com	Tuscon, Arizona	6/27/2006
Johnson	Dave		Repeat	55-4565	555-6549	dave@davej.com	Dallas, Texas	6/27/2006
Meyer	John		New	555-1234	555-4321	meyer@meyer.com	Denver, Colorado 80...	6/27/2006
Olsen	Ashley		New		555-555-8987	ashley@ashley.c...	Shelbyville, Illinois 48...	6/27/2006
Peeters	Jim		Inquiry				San Antonio, Texas ...	6/27/2006
Smith	Bob		Repeat	555-1212		bob@bob.com	Austin, Texas 77777	6/27/2006
Smith	Katie		Repeat	555-8899		katiesmith@email...	Seattle, Washington	6/27/2006
Taylor	Deb		Repeat		555-0101	deb@thetaylors.c...	Taylor, Texas 78000	6/27/2006
Taylor	Jim		New		555-7613	taylor@jm.com	Houston, Texas	6/27/2006
Thorn	John		Repeat			thorn@thorn.com	Ashland, Wisconsin ...	6/27/2006

At the bottom of the window, it shows "17 Customers" and "Portal status: Not replicating 4.3.4.17".

To add a customer:

1. Click the **Add** button  or select **Commands > Add** from the menu to display the Add Customer window

The screenshot shows the 'Add Customer' window with the following sections:

- Contact Information:** Includes a dropdown for honorific, fields for First and Last names, Other Names, Company, Address 1 and 2, City, State, Zip, and Country (USA). It also has fields for Work, Home, and Mobile phone numbers, Email 1 and 2, a Source dropdown, an 'Include in marketing list?' checkbox, and a Notes text area.
- Purchase History:** Features a table with columns 'Created', 'Arrival', 'Total', and 'Details'. Above the table are buttons for 'Add Reservation', 'Add Retail Sale', 'Edit', and 'Delete'.
- Additional Information:** Contains three sub-sections: 'Occasions', 'Interests', and 'Correspondence', each with an 'Add', 'Edit', and 'Delete' button.
- Footer:** Shows 'Created 4/1/2007' and buttons for 'Email', 'Print', 'Save', and 'Cancel'.

2. Add contact information.


The first drop-down box allows you to select an honorific (Mr., Mrs., Ms., Dr., Rev., Mr. & Mrs., or Dr. & Mrs.). The rest of the contact information section is self explanatory with the following notes: You can add a referral source on the fly if the source is not listed in the drop-down list, check a box to include the customer in your marketing list, and type a note about the customer. If you check the "include in marketing list" checkbox, then your customer will be included in generated marketing lists. If you type the zip code, the city and state will populate for you.

3. Once the contact information is defined, you can do the following from this window:

- Add reservations - Click Add Reservation
- Add retail sales - Click Add Retail Sale
- Add occasions - Click Add
- Add interests - Click Add
- Add correspondence - Click Add

You can also print and email customers information or import a customer list.

To edit a customer:


1. Double-click the customer's name or select the customer's name and click the **Edit** button  .
2. Change the information on the Edit Customer window.
3. Click **OK**.

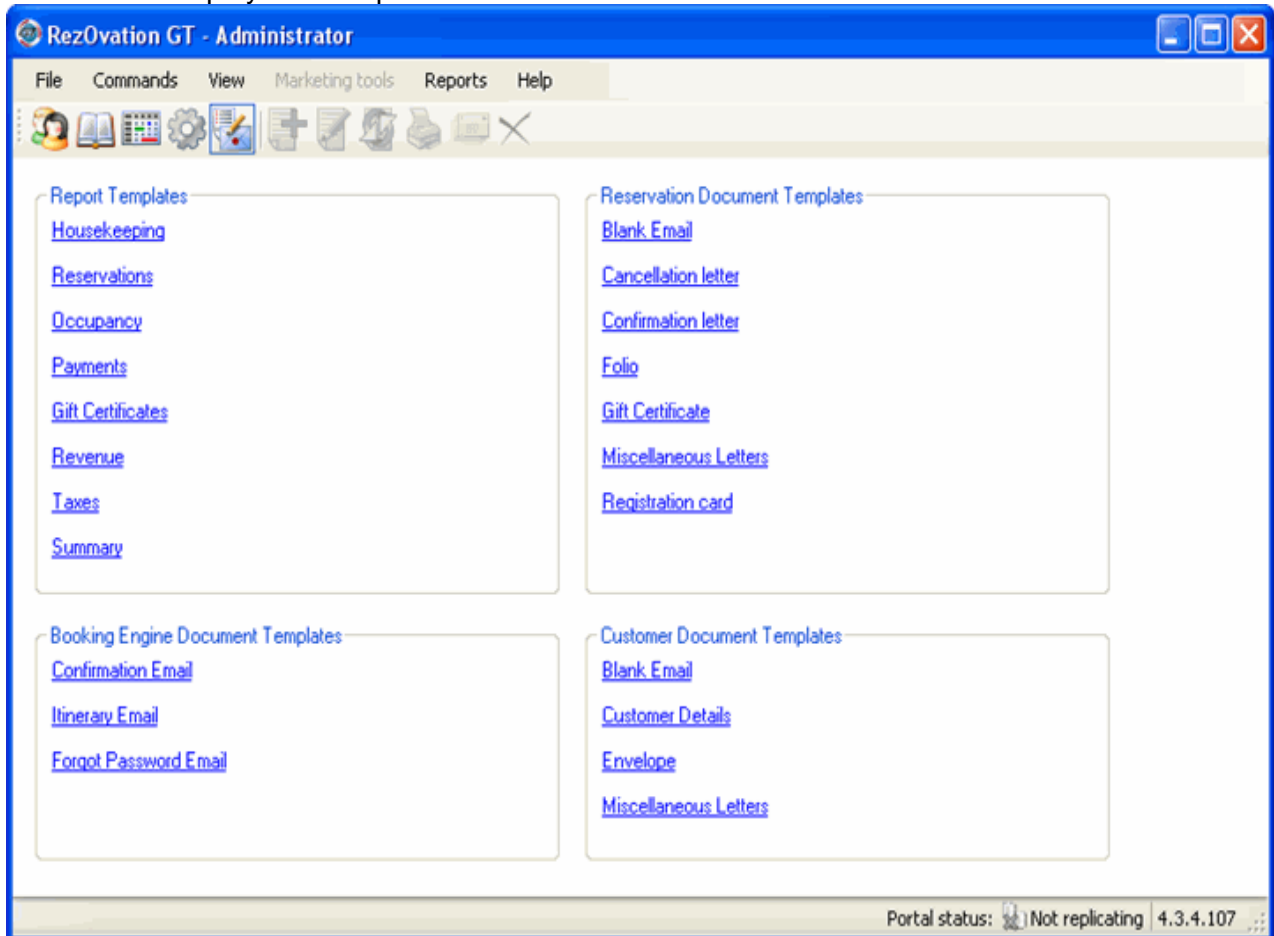
Document and Report Template Overview

In RezOvation GT, reports and documents are based on templates. A template determines the basic structure for a document and contains document settings such as fonts, page layout, special formatting, and fields. All templates are designed in Word using tables and field codes. Codes are used to pull data into the report or document such as invoice numbers, amounts due, names, etc.

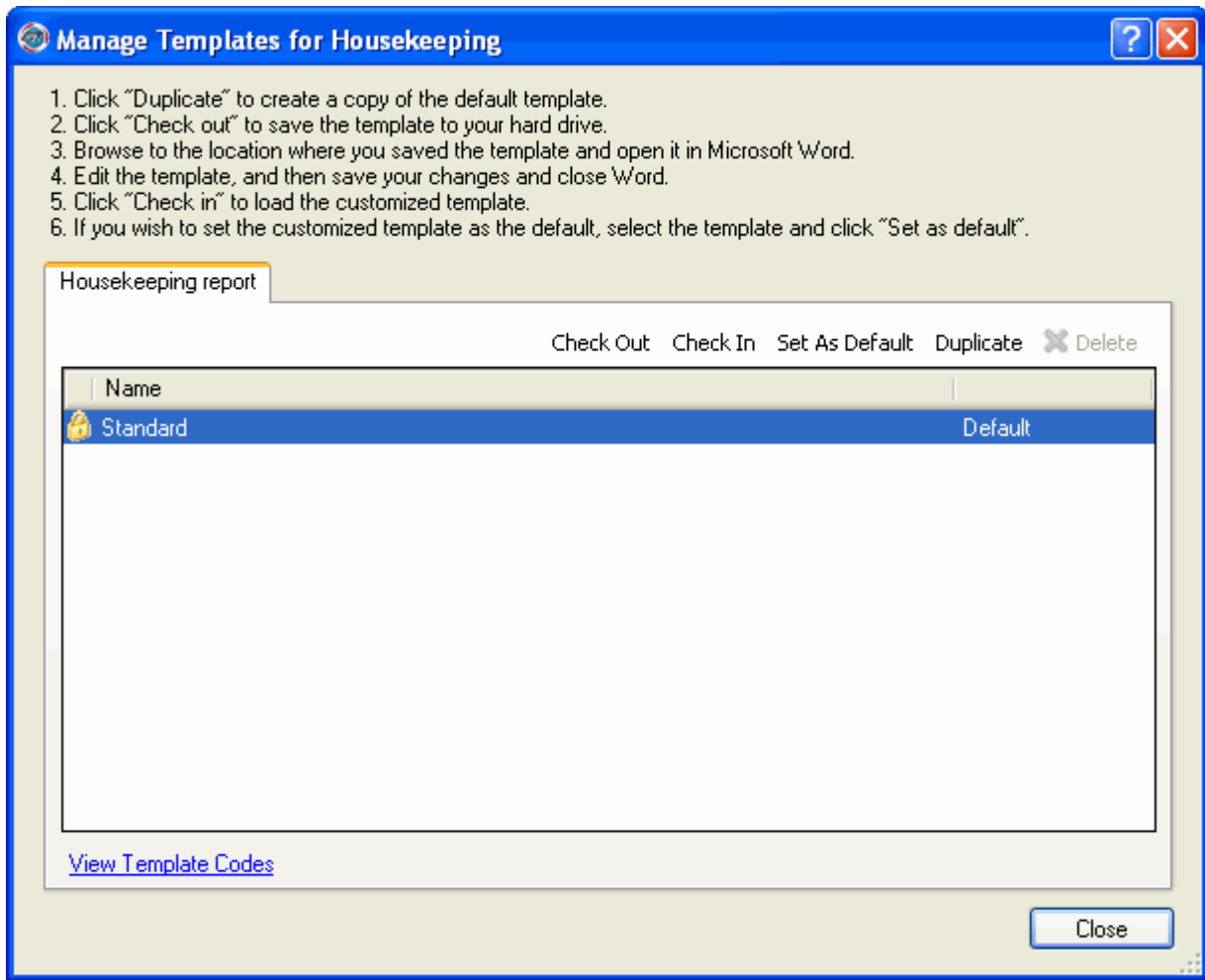
Editing templates involves checking them out of RezOvation GT, editing them in Word, and checking them back in to RezOvation GT.

To access templates:

1. Click the **Manage Templates** icon  or select **View > Manage Templates** from the main menu to display the Templates List.

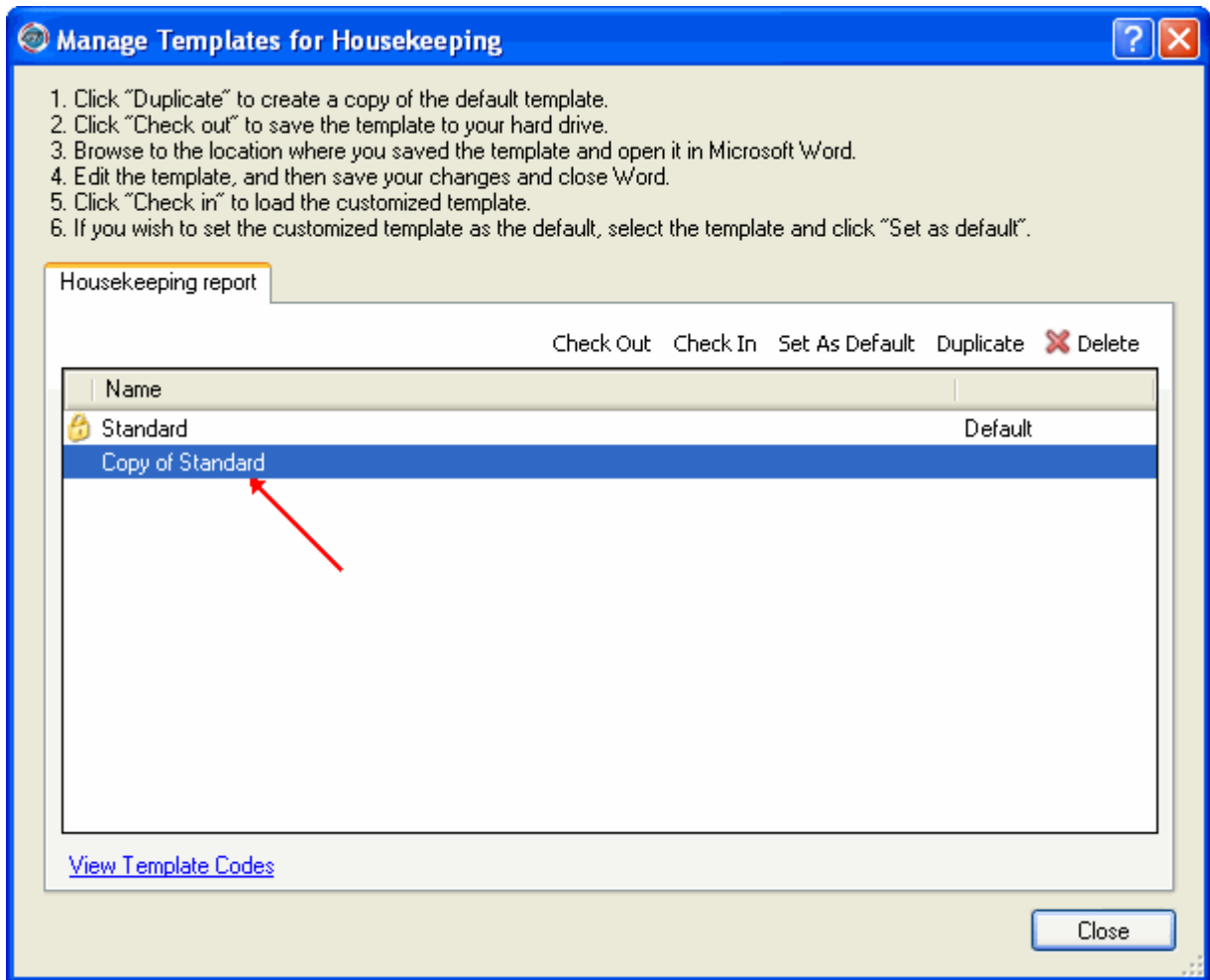


2. Click the report template or the document template to edit to display the Manage Templates window.



Templates are locked and cannot be deleted or edited directly. This ensures the original template will always remain as a fixed example on which to base other templates. You can customize a template by copying it and editing the copy. You can have several customized copies.

3. Click **Duplicate** to make a duplicate of the template.
4. Type a name for the duplicate when prompted.



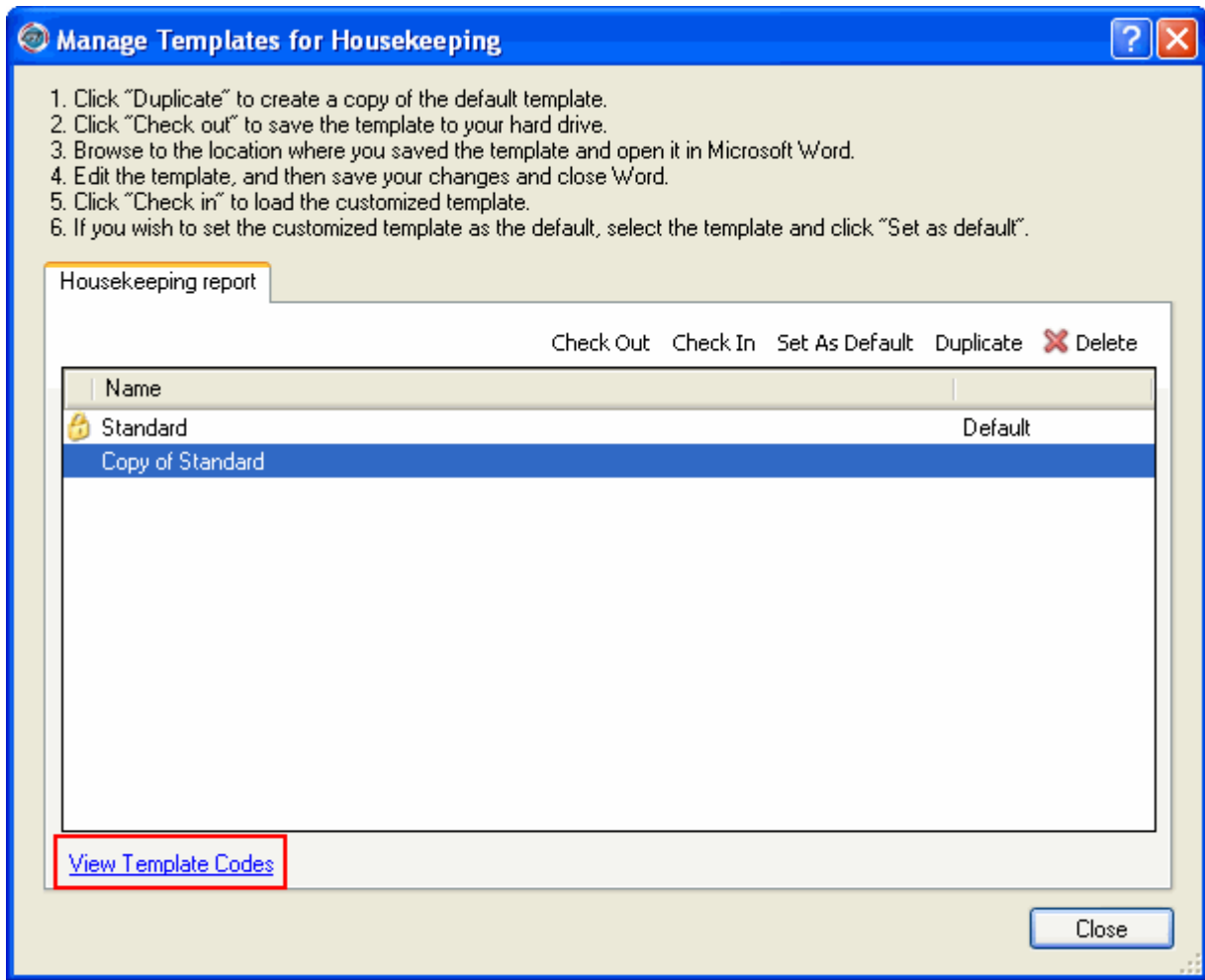
Note that the copy is not locked and you can now edit it, delete it, or duplicate it. To edit a template, you follow the process of checking the file out, editing it, then checking it back in so the program can use it. This ensures proper version control.

5. Click **Check out** to edit the template. You will be prompted for a location in which to save the file (similar to what you would see if you Save As in Word).
6. Open Word to edit the file.
7. Save the file in Word.
8. Click **Check in** to use the edited file in RezOvation GT.



*To use the edited template, rather than the standard template for the report or document, select the edited copy and click **Set as default**.*

If you want to add types of data to the template or change the types of data, you can add or change template codes. Each template has a set of valid template codes that can be viewed by clicking **View Template Codes**.



Information about the codes relevant for a specific template is provided in the Working with Reports and Working with Documents sections.

 **Glossary**

A

- Accrual Basis:** Accrual basis accounting recognizes the receipt of cash when it is earned rather than when it is actually received. Expenses related to the revenue are matched during the same accounting period.
- Add-on Package:** A package that does not include lodging charges and does not adjust the rate.
- Adjusted Rate:** A base rate that has been modified, for example, a seasonal rate or a rate override.
- Arrival:** An arrival minimum stay stipulates that the guest must stay on the arrival day plus a certain number of days after the arrival day.

B

- Base Capacity:** The number of persons who can stay in a room at the room rate.
- Base Rate:** The rate set for a particular room within a room type. The base rate is the rate normally charged for a room without any adjustment (a seasonal rate adjustment for example).
- Blackout:** A blackout makes a rate unavailable for a specified rate type.

C

- Cash Basis:** Cash basis accounting recognizes revenue when the cash is received, and expenses when the cash is disbursed.

E

- Effective Rate:** Base rate adjusted for specific dates = effective rate.

F

- Floating:** A floating minimum stay stipulates that the guest must stay a certain number of days and the arrival date must be one of those days, but not necessarily the first day.

L

- Lodging Package:** A package that includes lodging charges and adjusts the rate.

M

- Max Capacity:** The total number of persons who can stay in a room - extra per person charges may or may not apply.

O

Out of Service: Out of service makes a room unavailable at any rate. You can only make a room out of service from the occupancy map.

P

Per Day: Any fee or tax charged to the guest per day that is not associated with a room.

Per Reservation: Any fee or tax charged to the guest that is not associated with the room, but is for the duration of the reservation (a 5-day reservation would incur this type of charge once for the entire reservation).

Per Room per Day: Any fee or tax charged to the guest per day that is associated with a room.

Per Room per Reservation: Any fee or tax charged to the guest that is for the duration of the reservation and is associated with a room.

R

Room Rate: The rate at which a room is charged per day. The rate can be a base rate or a rate that has been adjusted seasonally.

Room Type: If room types are used, the name of a type of room that encompasses several similar rooms. For example, a king room type may be assigned to all rooms with a king sized bed.

Room Type Name: The name of the type of room. This is not the name of an individual room, but the name for a type of room to which individual rooms will belong; for example, "King."

Routing Number: A nine-digit identification number assigned to financial institutions and usually located on the bottom left of a check.

S

Secure SSL: Protocol developed for transmitting private documents via the Internet. SSL uses a cryptographic system that uses two keys to encrypt data - a public key known to everyone and a private or secret key known only to the recipient of the message. Many web sites use the protocol to obtain confidential user information, such as credit card numbers.

Sub-accounts: Sub-accounts are a way, in QuickBooks, to divide an account to provide more detail. For example, if you have a credit card account, you could create sub-accounts under the credit card account for Visa, Amex, MasterCard, etc. to track the credit card account by type of credit card used.

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