SMS | Host v16.0

Configuration and Use of Booking Center Functionality
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Introduction

The Booking Center is the new itinerary management component of SMS|Host version 16.0.

The Booking Center facilitates the creation of itineraries for multifaceted guest stays. An itinerary may be comprised of an unlimited number of itinerary detail line items (one or more reservations, spa appointments, golf tee times and/or dining reservations).

The new functionality simplifies the search for rates and availability while ensuring bookings are created in compliance with your reservation policies.

This guide provides the information required to setup, configure and use the Booking Center functionality in SMS|Host version 16.0. This document is intended for SMS customer staff across all business functions.

Putting the Booking Center to work

Properties running SMS|Host with other modules that need to create track and manage multiple bookings in a single itinerary will benefit greatly by using the new functionality in the Booking Center.

An example scenario is as follows.

An agent in the reservations office of a destination resort is on the phone with a guest. The guest and her spouse wish to stay for two nights; play a round of golf on Saturday, dine Saturday night in the outdoor café, and spoil themselves in the resort’s renowned Spa on Sunday. The agent must coordinate bookings for all activities and be certain to accommodate any special requests.

The Booking Center interface enables the agent to create and coordinate bookings for the room and all of the guest activities from a single screen. The Booking Center interface will alert the agent to any conflicts regarding schedule, resources, and resort policies. The agent may make changes to resolve any conflicts and then complete the itinerary. The agent confirms the itinerary over the phone and gives the guest the confirmation number linked to this itinerary for future reference.
Understanding Booking Rules

One of the most powerful and customizable features of the Booking Center is the use of Booking Rules. It is important that you have an understanding of how these rules work and are used in the booking process before proceeding.

The Booking Center provides the ability to predefine a set of Booking Rules to be enforced systematically during the reservation process.

What is a booking rule?

Functionally a booking rule is a predefined condition that must be met before a booking is accepted by the system. A booking rule may be defined for, and apply to, any type of booking made through the Booking Center, including a room reservation, tee time, spa or dining booking.

Technically a booking rule is a logical expression that you define through configuration screens in SMS|Host to enable the system to calculate how and when new bookings are to be allowed.

Booking rules may be further customized to apply only to certain dates and only to certain SMS|Host users. Dates may be specified in the rule expression, and users may be included or excluded from the rule using override settings.

How are booking rules applied in the Booking Center?

When creating an itinerary through the Booking Center, the system will evaluate each line item (booking) to determine whether it meets each of the applicable pre-defined booking rules. If a booking does not meet the conditions of a booking rule, the itinerary line item is highlighted on the agent’s screen in red. The agent will view the reason for failure and edit the booking to comply with the rule. If the agent has been assigned the required clearance they may simply override the rule and continue with the booking process.

Example application of Booking Rules

Booking Rule Example #1

A stay and play resort may require a two night stay at the resort to accompany a tee time booking on the resort’s premier golf course.

A booking rule is defined using a logical expression in SMS|Host to enforce this restriction when agents make bookings through the Booking Center.

If an agent tries to book a tee time for a guest who does not have a two night room reservation, or tries to book a tee time outside of the date range of the stay, the booking center interface will alert the agent by highlighting the tee time booking in red and will display the reason for the condition. Either a two night room reservation must be made to satisfy the rule, or a manager (with the required system privileges) must override the booking rule before the itinerary may be confirmed.
Booking Rule Example #2

A resort may require credit card information to hold a golf tee time booking for individuals who are not staying on the property. In this case, a booking rule is setup by defining a logical expression to verify the presence of either the room reservation or the credit card information and require one or the other before accepting the booking.

If an agent tries to book a tee time for a guest who does not have credit card information on file, or an active room reservation, the booking center interface will alert the agent by highlighting the tee time booking in red and will display the reason for the condition. Either a room reservation must be made or credit card information collected to satisfy the rule, or a manager (with the required system privileges) must override the booking rule before the itinerary may be confirmed.

Configuring Booking Rules

A section on configuring Booking Rules is included at the end of this guide.

Booking Rules are created by building logical expressions to describe the failure condition of your restriction to the system. Expressions used in Booking Rules are written in FoxPro Programming Language using the FoxPro Expression Builder.

Building expressions in FoxPro requires a basic understanding of the FoxPro scripting language and a familiarity with the SMS|Host data structure.

See Configuration of Booking Rules on page 72 below.
System and User Code Configuration

Several aspects of your system need to be configured to get the most out of the functionality offered through the Booking Center.

The following sections of this guide will provide you the information necessary to understand Booking Rules and to configure your system to use the Booking Center.

Miscellaneous Rates and Defaults

System & General Settings (F,L,E,2)

There are several settings related to the Booking Center in the Miscellaneous Rates and Defaults section of SMS|Host configuration.

Access these settings through the character based SMS|Host menu, Miscellaneous Rates and Defaults, System & General Settings, Page 2.

The full menu path from SMS|Host character Main Menu is F,L,E,2.

The table below describes each setting on this form related to the Booking Center.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Itinerary Expiration Period</td>
<td>Specify the amount of time in hours and minutes (hh:mm), the user has to complete the itinerary. If the itinerary is not completed (saved) within this time the bookings (and inventory) are released. The timer is restarted each time an item is added to the itinerary. Typically the expiration is set to 30 minutes (00:30) so that the inventory may be released from availability hold if the itinerary doesn’t get completed.</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Itinerary Expiration Time Out Period</td>
<td>Specify the amount of time in hours and minutes (hh:mm), that the inventory will be held after expiration. This effectively creates an extension to the Itinerary Expiration Period and allows a manager or other staff member with clearance to save the bookings and extend the time out period using the <strong>Extend Itinerary Expiration</strong> button on the form. If the itinerary is not extended (saved) within this time the bookings (and inventory) are released. Typically set to 5 - 10 minutes (00:05).</td>
</tr>
<tr>
<td>Maximum number of nights</td>
<td>Specify the maximum number of nights for which a reservation may be made (using the Booking Center).</td>
</tr>
<tr>
<td>Default Tee Time Tab “Use Rate Filters” (Y/N)</td>
<td>This setting controls the default state of the <strong>Use Rate Filters</strong> checkbox on the Tee Time Tab in the Booking Center. When the check box is enabled tee times are filtered and only those tee times with valid rates are displayed. <strong>Note:</strong> The additional filtering can save time when making bookings by directing the user to valid rates but can slow down the initial display of results. To maximum the speed in which available tee times are displayed (regardless of rates) set this setting to N and leave the box unchecked.</td>
</tr>
<tr>
<td>Default Rate Tab “Dynamic Update” (Y/N)</td>
<td>If Y is specified, each time you change information in the header the displayed room rates will update in the Booking Center. <strong>Note:</strong> While this eliminates the need for manually updating the result set, with a large number of rates it can slow the booking process as the system will wait to update the results list each time criteria is changed.</td>
</tr>
<tr>
<td>GTT Tab Instant Avail and Rate Display (Y/N)</td>
<td>If N is specified the user must click on the “Update Availability” button in the Booking Center whenever filter conditions are changed. If it is set to Y, then the availability automatically updates itself whenever the filter conditions are changed.</td>
</tr>
</tbody>
</table>
Rates and Packages (F,L,U,2)

Access these settings through the character based SMS|Host menu, Miscellaneous Rates and Defaults, Rates and Packages, Page 2 Rate Versioning.

The full menu path from SMS|Host character Main Menu is F,L,U,2.

![Menu Path Image]

The table below describes each setting on this form related to the Booking Center.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
</table>
| The Number of Rates Returned in Booking Center (1-7000) | Specify the number of rates / rows to return when the "Get Next # Rates" button is selected in the Booking Center.  
**Note:** the Rate Calculator returns 6 rates at a time by default. |
User Clearance Settings

Settings in Setup and Installation / User Log-On Codes determine individual access to Booking Center functions. Settings specific to the Booking Center are illustrated and detailed below.

Configuring User Codes, Page 9 (F,J,9)

This configuration screen is accessible from the SMS|Host Main Menu by following menu path F,J,9.

The table below describes each setting on this form related to the Booking Center.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Override Booking Rule Level</td>
<td>Valid booking rule level overrides are 0-9. Zero being the lowest level and 9 being the highest. Each user and each booking rule has an override level. If the user’s level meets or exceeds the level defined for the booking rule, then the user may override the rule when making a booking through the Booking Center.</td>
</tr>
<tr>
<td>Edit Booking Rules</td>
<td>Specify X to enable this clearance.</td>
</tr>
<tr>
<td></td>
<td>Users with this clearance can access the booking rule setup screen (Configuration / Booking Rule Setup) and add/edit booking rules.</td>
</tr>
<tr>
<td>Edit Level on Guest Tile</td>
<td>Specify X to enable this user to edit the Level field on the Guest Tile.</td>
</tr>
<tr>
<td></td>
<td>The guest’s override level determines which booking rules the guest is subject to when booking through the Booking Center.</td>
</tr>
</tbody>
</table>
Setting | Description
--- | ---
Extend Itinerary Expiration - Maximum number of hours and minutes (hh:mm) | A timer is started each time line items are added (inventory is allocated) to an itinerary. If not completed before the timer expires, the bookings are deleted and the reserved items are returned to inventory.
Enter the maximum time in hours and minutes (hh:mm) that this user may extend the Itinerary Expiration Period when using the Booking Center.

Use the Booking Center | Specify X to enable this user to access the Booking Center.

Configuring User Codes, Page 0 (F,J,0)

This configuration screen is accessible from the SMS|Host Main Menu by following menu path F,J,0.

The table below describes each setting on this form related to the Universal Lookup.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Universal Lookup Settings</td>
<td>Specify X to enable this user access to the Tuning button and Universal Lookup Configuration settings screen.</td>
</tr>
<tr>
<td>Use Central Guest Scan</td>
<td>Specify X to enable this system to query the Central Reservations System for guest and reservation records in Universal Lookup (this feature is used only in a Multi Property configuration).</td>
</tr>
</tbody>
</table>
Familiarization with the Booking Center Interface

The Main Window

The Booking Center main window is divided into several distinct functional areas. Each is summarized below and detailed in the following sections.

At the top left of the screen is the **Guest Selection / Information** pane. Guests are selected and relevant information regarding the active guest is displayed here.

**Itinerary Detail** is displayed in the grid in the upper right portion of the screen. The grid displays the Itinerary number, corresponding status, and detailed line items for the bookings it contains.

The information displayed within the **Tabbed Information Display Area** in the central panel changes according to the Tab selected along the top of the panel. Select Tabs to enable the search for rates and availability for each of the following: Guest Room, Resort Scheduling, Tee Times, Dining, and Vendor Activity. The Booking Info tab displays a summary and details on each booking made.

The current availability of the service (considering the selected criteria) is displayed in the **Dynamic Availability Grid**.

The **Button Bar** along the bottom of the window provides quick access to the functions required to create, view and edit guest itineraries.
Guest Selection / Information Pane

The Guest Selection / Information pane displays the currently selected guests and profiles attached to this itinerary as well as arrival and stay information.

![Image of Guest Selection / Information Pane]

Itinerary Detail

The information displayed in this area describes the booking line items of the itinerary. The Itinerary Detail section of the screen has several elements.

Each element is indicated and detailed below.

![Image of Itinerary Display Columns]

Itinerary Button Bar

Stay and Total Summary Fields

Display Filters

Itinerary Display Columns

The information is presented in columnar fashion under the column headings described below.

<table>
<thead>
<tr>
<th>Column title</th>
<th>Description of data displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ty (Booking Types)</td>
<td>Booking Type Code (one of the following):</td>
</tr>
<tr>
<td></td>
<td>(R)eservation - an SMS</td>
</tr>
<tr>
<td></td>
<td>(G)olf – a golf tee time booking</td>
</tr>
<tr>
<td></td>
<td>(S)pa – a spa booking</td>
</tr>
<tr>
<td></td>
<td>(D)ining – a dining booking</td>
</tr>
<tr>
<td></td>
<td>(V)endor – a vendor activity booking</td>
</tr>
<tr>
<td>Gst (Guest)</td>
<td>The 6 digit alphanumeric Guest Tile number of the currently active (selected) guest.</td>
</tr>
<tr>
<td>Column title</td>
<td>Description of data displayed</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Prf (Profile)</td>
<td>The Profile number of the currently active (selected) guest.</td>
</tr>
<tr>
<td>Res (Reservation)</td>
<td>The reservation number of the currently active (selected) guest.</td>
</tr>
<tr>
<td>Lev (Booking Level)</td>
<td>The booking level of the line item (NEW, CAN, CNF, INH)</td>
</tr>
<tr>
<td>Code (Booking Code)</td>
<td>The 6 digit code attached to the booking (rate code, service code, etc.)</td>
</tr>
<tr>
<td>Description</td>
<td>Description tag for the booking line item.</td>
</tr>
<tr>
<td>Date</td>
<td>The date or date range for the booking line item.</td>
</tr>
<tr>
<td>Time</td>
<td>The scheduled time for the booking line item.</td>
</tr>
<tr>
<td>Ppl (People)</td>
<td>Number of people in the booking (Total of Adults, Children, Other).</td>
</tr>
<tr>
<td>Location</td>
<td>Location (treatment room, course, restaurant, etc.).</td>
</tr>
<tr>
<td>Amount</td>
<td>The price for the booking line item.</td>
</tr>
<tr>
<td>Duration</td>
<td>The total length of the booking in minutes.</td>
</tr>
<tr>
<td>Booking #</td>
<td>The confirmation number for the booking line item.</td>
</tr>
<tr>
<td>Employee</td>
<td>The Employee currently assigned to the booking line item.</td>
</tr>
<tr>
<td>Completed</td>
<td>The status of the booking line item within the Itinerary “Completed” or blank (incomplete).</td>
</tr>
<tr>
<td>Deleted</td>
<td>(field not used)</td>
</tr>
</tbody>
</table>

**Itinerary Button Bar**

The row of buttons within this display area provides access to the functions needed to save or delete the itinerary. These buttons are dimmed when the action is unavailable or disallowed at that time.

<table>
<thead>
<tr>
<th>Button Name</th>
<th>Button Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete</td>
<td>Complete the Itinerary to save the bookings within it. All booking requirements and booking rules must be met or overridden before an Itinerary can be completed. Bookings can be confirmed once the Itinerary is complete.</td>
</tr>
<tr>
<td>Confirm</td>
<td>Change the level of a booking to CNF and apply a deposit if applicable.</td>
</tr>
<tr>
<td>Unlink All Items</td>
<td>Delete the Itinerary - cancel and kill all pending (incomplete) bookings.</td>
</tr>
<tr>
<td>Cancel Itinerary</td>
<td>Cancel all completed bookings within the Itinerary. Bookings such as reservations with a balance must be cancelled individually.</td>
</tr>
</tbody>
</table>
### Button Name

<table>
<thead>
<tr>
<th>Button Name</th>
<th>Button Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Pending</td>
<td>Cancel and kill all pending items within the Itinerary. The Itinerary number will remain in the header to allow you to continue booking for this Itinerary or as a record of what occurred if you choose to abandon this process.</td>
</tr>
</tbody>
</table>

### Stay and Total Summary Fields

Date range and totals are displayed.

**First / Last / Total**

The First and Last night of the itinerary and the total for the entire Itinerary including taxes, gratuities and extras.

### Display Filters

The following two filters affect the content displayed in the Itinerary Detail display.

**Display Cancelled Bookings**

This is a toggle that will either display or hide cancelled bookings within the displayed itinerary.

**Display Itinerary for Selected Guest**

Enabling this will display the itinerary for the guest selected in the Guest Selection / Information pane. This feature is used when there is more than one guest associated with the itinerary and you only wish to display their bookings.
Tabs and the Tabbed Information Display Area

The Tab bar along the top of the Tabbed Information pane enables you to quickly display the Guest Room, Resort Scheduling, Tee times, Dining, Vendor Activity and Booking Information screens.

Click on any tab to select it and display relative information.

The tools and information available when each is active is detailed in the next several sections of this guide.

Guest Room Tab

Select the Guest Room tab to book SMS|Host room reservations. Available room rates are displayed based on the criteria you define in the rate filters on this form.
Rate Filters on the Guest Room Tab

There are many filters available in the center section of the screen to define the booking.

The **Arrive**, **Depart**, and **Adults** (# of) fields, are required and must be populated before any rates can be calculated or displayed.

Enter criteria in any of the filter fields to refine the rate search as indicated below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Arrive</strong></td>
<td>Guest’s intended date of arrival for the room reservation.</td>
</tr>
<tr>
<td><strong>Depart</strong></td>
<td>Guest’s intended date of departure for the room reservation.</td>
</tr>
<tr>
<td><strong>Note</strong>:</td>
<td>The Arrive and Depart dates will default to the dates entered into the Master Date Range fields. You may adjust these to any dates within the master date range.</td>
</tr>
<tr>
<td><strong>Adult/Child/Other</strong></td>
<td>The number of expected Adults, Children or Others for the Guest Room reservation. An ‘Other’ is often considered a non-package guest.</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>Room type field. Select the down-arrow next to this field to display a list of available room types. Rates generally vary based on the type of room the guest is occupying.</td>
</tr>
<tr>
<td><strong>Unit</strong></td>
<td>Room number field. Clicking on the down arrow next to this field will display a list of available room numbers for the type entered above. Selecting a unit at this time would result in a ‘hard blocked’ reservation.</td>
</tr>
<tr>
<td><strong>Units</strong></td>
<td>Indicates the number of units for this particular reservation.</td>
</tr>
<tr>
<td><strong>Note</strong>:</td>
<td>If a room number is selected above, this field cannot be edited. Rates calculate based on the number of units entered.</td>
</tr>
<tr>
<td><strong>Corp</strong></td>
<td>Enter a corporate code into this field to display rates that are applicable to the specific corporate code entered.</td>
</tr>
<tr>
<td><strong>Secy</strong></td>
<td>Enter a secretary code into this field to display rates that are applicable to the specific secretary code entered.</td>
</tr>
<tr>
<td><strong>Group</strong></td>
<td>Enter a group code into this field to display rates that are applicable to the specific group code entered.</td>
</tr>
<tr>
<td><strong>T-Agent</strong></td>
<td>Enter a travel agent code into this field to display rates that are applicable to the specific travel agent code entered.</td>
</tr>
<tr>
<td><strong>Pkg/Rate</strong></td>
<td>Use to filter for rates that have a specific feature attached.</td>
</tr>
<tr>
<td></td>
<td>Select the down-arrow to choose from a list of available package / rate feature codes.</td>
</tr>
</tbody>
</table>
### Requests
Specify unit (room) criteria.

**Note:** Unlike all other fields in this section, this option will not narrow down the selection of rates displayed. This will only narrow the selection of units displayed when selecting a unit to attach to the reservation.

### Market
Market segment defines the type of guest stay. Rates generally have a market segment attached to them. Entering a market code here will return only rates that are available to that particular market segment.

### SubSegm
This field displays the active SubMarkets (if configured). This field is not currently used in the rate filtering process.

### Multi-Prop
If the system is configured for Multi-Property and if rates are configured to filter by Multi-Property, then entering a Multi-Property code into this field will narrow the selection of returned rates accordingly.

### Meals
If rates are configured with a meal plan attached to them, entering a meal plan code into this field will return only those rates for the specific meal plan.

### Rate/Pkg
Specify **R** to display Rates only or **P** to display Packages only.

### Rate Group
Affects the order in which rates are displayed within the available rate scan.
Rate Display Controls

There are several options available to affect how the rates are presented.

| **Currency** | Select currency in which to display rate values. Default is $US. |
| **Override Restrictions** (checkbox) | Check this box to display restricted rates. Note: This checkbox and option is only available if the current user has clearance to override rate restrictions. The configuration setting for this clearance is in User Log-on Codes, menu path, F,J,1. |
| **Display One Row per Rate** (checkbox) | Check this box to display each unique rate on a single row in the result set. You may then double-click any row / rate to drill down and view available room types (as in the F5 Rate Calculator.) |
| **Dynamic update** (checkbox) | Check this box to activate the dynamic update feature. The Dynamic update feature enables the system to begin displaying rates as soon as filter conditions are entered. Note: While this eliminates the need for manually updating the result set, with a large number of rates it can slow the booking process as the system will refresh the results list automatically each time criteria is changed. |
| **Column Selector** | Choose from several presets to determine the columns displayed. |
| **Zoom** | Select Zoom to drill down into the selected rate and view details regarding its configuration, deposit requirements, and value. |
| **Quotes** | You may quote a guest a rate and save it for future bookings. Quotes are stored and quote numbers are automatically assigned. When you select the Quote button you are prompted as follows: Scan for Quoted Rate or Quote the Rate (S/Q)? Scanning enables you to look up a previously saved rate and apply it to this booking. |
| **Get All Rates** | Select this button to return a listing of all available rates based on the selected criteria. |
| **Get Next 25 Rates** | Select this button to return only the specified # of rates. Note: The number to be returned is configurable through Misc. Rates & Defaults, menu path F.L.U.2. “The Number of Rates Returned in Booking Center (1 THROUGH 7000).|
Resort Scheduling Tab

Select the Resort Scheduling tab to make Individual and Class bookings as well as bookings for “Ticketing Products” based on availability and the criteria you select within the header.

Within the Resort Scheduling tab there are two vertically oriented tabs on the left side of the screen; Classes and Individual Services. Individual Services allows you to book anything that qualifies as a Service that does not use Products. The Classes tab allows you to book Classes as well as Services that utilize Products.

Resort Scheduling / Individual Services Tab

Select the Individual Services tab to book a Service that does not involve the sale of additional products.

Service availability is displayed on the sheet in the lower section of this screen based on the criteria you have selected above.

**Note:** The Individual Services tab always utilizes Max Availability. The numbers displayed as being available for the Services are based on the lesser of Resource and Employee availability. For example, if you have 10 resources available for a particular service, but only 7 employees are qualified and scheduled to work, availability will be calculated and displayed as ‘7’.
Filtering the displayed data

Use the filters on this screen to affect the set of displayed data as described below.

<table>
<thead>
<tr>
<th><strong>Calendar Selector</strong></th>
<th>Select the desired date.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Day, AM, PM radio buttons</strong></td>
<td>Select the portion of the day you wish to display on the sheet.</td>
</tr>
<tr>
<td><strong>Display Range Indicator</strong></td>
<td>Indicate vertical and horizontal scale of the sheet. Higher numbers will compress the scale.</td>
</tr>
<tr>
<td><strong>Vertical Scale Selector</strong></td>
<td>Choose from three pre-defined vertical scale selectors to apply to your sheet scale.</td>
</tr>
<tr>
<td><strong>T1, T2, T3</strong></td>
<td>These buttons are used to jump to the preset times of the day. The system can be configured with 3 time presets. Clicking on each of these will jump to the time configured for that particular button.</td>
</tr>
<tr>
<td><strong>Facility Filters</strong></td>
<td>Select the Facility you wish to book for.</td>
</tr>
<tr>
<td><strong>Service Category Filter</strong></td>
<td>Select a Service Category to filter. For example - If you have defined ‘MS’ as a category for massages, only massages would display in the Service listing.</td>
</tr>
<tr>
<td><strong>Employees Filter</strong></td>
<td>Filter Employee listing using All, Male, Female radio buttons, or select a specific Employee to assign to your booking(s) by single-clicking on the Employee. Availability in the sheet will update based on qualifications and who is scheduled to work.</td>
</tr>
</tbody>
</table>
Resort Scheduling / Classes Tab

Use the Classes tab to book Classes as well as Classes that utilize Products. Scheduled Classes and related products may be easily added to the booking using the controls on this tab.

Filtering the displayed data

Use the filters on this screen to affect the set of displayed data as described below.

**Calendar Selector**  
Display availability by date. Select the desired date for the class booking.

**Adult/Child/Other**  
The number of expected Adults, Children or Others for this booking. An ‘Other’ is often considered a non-package guest.

**Facility**  
Select a facility – only services for this facility will be displayed.

**Category**  
Select a category – only services for this category will be displayed.

Services / Times / Classes

**Services**  
Select a Service. Double-clicking on a Service will add it (as a line item) to the itinerary.

**Scheduled Times**  
Select a time for this booking. Double-clicking on the time will book the service if products are not associated with it. If products are associated with the service, apply a single-click to the service to highlight it. You may then double-click on the product to add it (as a line item) to the itinerary.

**Class**  
Displays the available classes for the selected Service. Double-clicking on a class will add it (as a line item) to the itinerary.
Tee Times Tab

Select the **Tee Times** tab to book a tee time. All rate and availability information required to make a tee time booking is accessible via this form.

![Tee Times Tab](image)

Filters available on Tee Times Tab

The filters on this form affect the display of tee time information as indicated below.

**Calendar Selector** Display availability by date. Select the desired date for the tee time to be booked.

**# Players** Enter the # of players that will play in this group.

**# Days** Enter the # of days (from the selected calendar date) for which availability is to be displayed.

**Guest Type** (radio buttons) Select from Hotel Guest, Day Guest, or Member. The displayed (available) tee times are filtered based on the guest type you select.

**Member Type** Enter the type of member. Select from options in the drop down list. The displayed (available) tee times are filtered based on the member type you select.

**Use Rate Filters** Use your mouse to enable (check) or disable (uncheck) this checkbox.

If enabled only those tee times with available rates will be displayed. Tee times without an available rate are not displayed. The default for this setting may be specified via a setting in Miscellaneous Rates and Defaults (menu path F.L.E.2).
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfect Fit</td>
<td>Enabling this feature will cause only tee times that are available and considered a ‘Perfect Fit’ to be displayed. For example: If you are looking for a tee time for a twosome, only tee times for twosomes will be displayed. Tee times for foursomes will be eliminated from the list.</td>
</tr>
<tr>
<td>Course</td>
<td>Select a golf course from the list of available courses. Select All Courses to view available tee times for all courses.</td>
</tr>
<tr>
<td>Day Part</td>
<td>If you are utilizing Day Part functionality, select the portion of day you wish to book for.</td>
</tr>
</tbody>
</table>
Dining Tab

Select the **Dining** tab to make a reservation for fine dining. The information you need to make the dining booking is available on this form.

Filters on the Dining Tab

Use the filters on this screen to affect the set of displayed data as described below.

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Calendar</strong></td>
<td>Display availability by date. Select the desired date for the dining reservation to be booked.</td>
</tr>
<tr>
<td><strong># of Days</strong></td>
<td>Enter the # of days (from the selected calendar date) for which availability is to be displayed.</td>
</tr>
<tr>
<td><strong># of People</strong></td>
<td>Enter the # of people that will be dining under this reservation.</td>
</tr>
<tr>
<td><strong>Facility Selector</strong></td>
<td>Select a facility – only services for this facility will be displayed.</td>
</tr>
<tr>
<td><strong>Display Range Indicator</strong></td>
<td>Indicate vertical and horizontal scale of the sheet. Higher numbers will compress the scale.</td>
</tr>
<tr>
<td><strong>Vertical Scale Selector</strong></td>
<td>Choose from three pre-defined vertical scale selectors to apply to your sheet scale.</td>
</tr>
<tr>
<td><strong>AM / PM / Day</strong></td>
<td>The AM button will show the first bookings available in the morning. The PM button will show bookings starting at 12pm noon. The Day button will condense the schedule so that the entire day can be viewed on one screen.</td>
</tr>
<tr>
<td><strong>T1, T2, T3</strong></td>
<td>These buttons are used to jump to the preset times of the day. The system can be configured with 3 time presets. Clicking on each of these will jump to the time configured for that particular button.</td>
</tr>
</tbody>
</table>
Display / Selection Grids on this screen

**Dining Service Grid**

The Dining Service Grid provides a list of dining services available for booking.

Double-clicking on a Service will add it (as a line item) to the active itinerary.

*Note:* Typically there is a separate service for each meal period for each facility / restaurant.

---

**Availability Grid**

The Availability Grid will display the number of bookings remaining for each time slot. These time slots are called **Waves**. Waves can be configured by People, Tables or Bookings. The type of wave that is configured will be displayed in the lower left hand quadrant of the screen right above the dates in the availability grid.
Vendor Activity Tab

Select the **Vendor Activities** tab to make a Vendor Activity Booking. The information you need to make a Vendor Activity booking is found on this form.

![Vendor Activity Tab](image)

**Filters on the Vendor Activity tab**

- **Calendar Selector**
  - Display availability by date. Select the desired date for the dining reservation to be booked.

- **Quantity**
  - Enter the number of people for this booking.

- **Time**
  - Enter the time for the activity booking.

**Activity Category Selector**

Select an Activity Category to display Services within the category. For example, if you have defined ‘A1’ as a category for adult horse back rides, then only Vendors who provide that particular service will appear in the Activity Vendors grid.

**Activity Vendors Listing**

The listing on the right hand side of this tab displays all vendors that offer the activity according to the filters and preferences indicated.

The information displayed in the columns is described in the table below.
**Columns in the Activity Vendors Listing**

| **Category** | Categories are attached to Vendors. The category is a way of grouping together the various types of activities that are available.

For example, a category code of **A1** might be used to indicate **Adult 1-Hour**. This category code is then attached to each vendor that offers an Adult 1-Hour activity. |
| **Code** | This is the 6 character alphanumeric Vendor code. |
| **Rating** | The rating is used to determine the order in which vendors appear in the list of available vendors for each category. |
| **Name** | The name of the Vendor. |
| **Price** | The “per item” price. |
| **Per** | Per Unit, Person, Adult, Child, or Other. |
| **Phone 1** | The main phone number to use to contact the Vendor. |
Booking Info Tab

Select the **Booking Info** tab to view the details of a particular booking. The details of the selected booking are displayed in the body of this form.

Position the mouse cursor over each booking line item (row) in the Itinerary Detail pane to display details for a booking in this panel.
Universal Lookup and Guest Profiles

Search functionality enabling the speedy location of all types of records in SMS|Host is incorporated through the Universal Lookup feature.

Guest Profiles and the ability to capture, retrieve and apply guest preferences are significantly enhanced in version 16 of SMS|Host. The Booking Center factors information pulled from Guest Profiles into new room rate lookups and recreation bookings.

A brief introduction to each of these features is included in this guide. A solid understanding of these features will help you and your staff to become more efficient working in SMS|Host and the Booking Center while providing a higher level of customer service.

If you are not intimately familiar with these features we highly recommend that you review these documents:

- **SMS Document # 1010330, SMS|Host, Guide to Universal Lookup**
  For information regarding the use and configuration of the Universal Lookup feature in SMS|Host.

- **SMS Document # 1010310, SMS|Host, Guide to Guest Profiles**
  For information regarding the use and configuration of the Guest Profile functionality in SMS|Host.

These documents are available through SMS Support Services or may be downloaded directly from customer documentation section of the SMS website at [http://www.springermiller.com](http://www.springermiller.com).

Universal Lookup

The Universal Lookup form provides a quick and convenient way to locate guest records, reservations, spa appointments, golf tee times, and condominium owner contracts. The Universal Lookup form provides the ability to locate a record using a variety of search criteria.

Press the **F3** function key on your keyboard (while in Host) to open Universal Lookup.

*Note: The Misc Files and Options screen previously attached to this function key is now accessed through the function key combination **Ctrl+F3**.*

Search by Name

Search by name is the default search mode for the form. Upon entering the form the **Name Search For** dropdown menu is open for you to select a method by which to search. To reopen the dropdown menu press the **Alt+N** hotkey combination.
Guest Tiles
By Guest Last (Shortcut key: “G”)
Profiles (Shortcut key: “P”)
Guest Tiles and Profiles (Shortcut key: “Q”)
By Company Name (Shortcut key: “C”)

Reservations
All Reservations (Shortcut key: “=”)
NEW & CNF Reservations (Shortcut key: “N”)
INH Reservations (Shortcut key: “+”)
Cancelled Reservations (Shortcut key: “X”)

Itineraries
Itineraries (Shortcut key: “I”)

Bookings
All Scheduled Bookings (Shortcut key: “K”)
Spa Bookings (Shortcut key: “S”)
Golf Tee time Bookings (Shortcut key: “T”)
Dining Bookings (Shortcut key: “D”)
Membership Accounts (Shortcut key: “M”)
City Ledger Accounts (Shortcut key “L”)

After selecting a search option, type the first few characters of the guest’s Last Name and the form will dynamically update the result list for you.

Double-click on any line in the Results Listing to open the associated record.
Narrowing the Search by Name results list using Filters

The results may be further refined by entering data in any of the Filter fields to the right of the Last Name field.

![Image of Universal Lookup]

**Note:** These filters work only in conjunction with the Last Name field and will not produce results unless characters are entered in the Last Name field.

Adjusting the Tuning Settings

Tuning settings (across the top of the form) are provided to adjust the sensitivity of the dynamic search functionality and determines the number of characters that need to be entered in order for the system to begin displaying results.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Local System</strong></td>
<td>Enter the number of characters in the data field required to initiate the search in the local system.</td>
</tr>
<tr>
<td><strong>Central System</strong></td>
<td>Only applies to SMS Enterprise systems. This field determines the default setting for the number of characters required to pull data from the central system. Enter the number of characters in the data field required to extend the search to the central reservation system.</td>
</tr>
</tbody>
</table>

The number of characters required by each filter is indicated in the parenthesis (#) to the right of each filter name. The results list is updated only after this required number of characters has been entered in a given filter field.

More on the Universal Lookup

See SMS Document # 1010330, entitled [SMS/Host, Guide to Universal Lookup](http://www.springermiller.com) for more information regarding the use and configuration of the Universal Lookup feature in [SMS/Host](http://www.springermiller.com).

The document is available through SMS Support Services or may be downloaded directly from customer documentation section of the SMS website at [http://www.springermiller.com](http://www.springermiller.com).
Guest Profiles

Keeping detailed profile and preference information on your guest enables you to provide a quality level of service to your guests.

Preferences stored in a guest profile are factored by SMS|Host when performing a room rate lookup and when making Resort Scheduling or Golf Tee Times bookings.

Each primary guest may have a profile and may have up to nine (9) additional profile names (family members, related individuals) defined. You may attach a profile to a booking in the Booking Center using any of the profile names.

Accessing guest profiles

From the guest tile

Select the Profile button from the button bar at the bottom of the guest tile. This will access an existing, or create a new, guest profile for the active guest.
Search and open profiles via Universal Lookup

The universal lookup search functionality enables a search for, and quick access to, a specific guest profile.

Press the **F3** key on your keyboard to launch the universal lookup form.

Specify to search for “Profiles” in the **Name Search For** drop down box.

When the results appear and you have located the record you are looking for, position your mouse pointer over the record, and double-click your mouse to open the guest profile form.
The guest profile screen

The basic parts of the Guest Profile screen are illustrated below.

Each of these screen elements is briefly described below.

**Tab Bar**

The selectable “tabs” across the top of the guest profile screen help organize the different types of data stored for each profile. Selecting a specific tab causes the data related to the tab name to be displayed in the Tab Specific Display Area and Memo Code Display Area of the screen.

<table>
<thead>
<tr>
<th>Screen Tab</th>
<th>Purpose / Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Displays a summary of notes entered regarding the selected guest.</td>
</tr>
<tr>
<td>Recreation</td>
<td>Store and retrieve information regarding health restrictions, special needs, service provider preferences, height and weight.</td>
</tr>
<tr>
<td>Reservation</td>
<td>Store information regarding room requests and market segment to be considered when making room reservations for this guest.</td>
</tr>
<tr>
<td>Dining</td>
<td>Displays a summary of notes regarding dining preferences.</td>
</tr>
<tr>
<td>Biographical</td>
<td>Store and retrieve information regarding marital status, income, and number of children.</td>
</tr>
</tbody>
</table>
In-Room

Store preferences regarding in-room features such as room temperature, TV and music channels, genres and restrictions.

Communication

Store preferences regarding language and means of communication.

Transportation

Displays a summary of notes regarding transportation preferences.

Housekeeping

Displays a summary of notes regarding housekeeping preferences.

Casino

If the optional Casino module is installed, this screen displays a summary of notes regarding gaming preferences.

All

Displays a full summary of notes across all areas of preferences.

Property Selector

If your SMS|Host system is configured for Enterprise, each of the property names will appear, and will be selectable, in this list.

A complete profile and set of preferences may be compiled for each guest at the enterprise or the specific property level. This is important as each of your properties may present different options for the guest. For example at a seaside property the guest may prefer an ocean view suite while at a golf resort they may prefer to be pool-side.

Profile Detail

This section of the guest profile screen displays the name of the guest and related profiles and provides a means of switching between them. Use your mouse pointer to click on the desired profile name. Specify first and last name, title, SSN#, gender and birth date for the selected guest.

Tab Specific Display Area

The information displayed in this area of the screen is dynamic and changes according to the specific Tab selected on the Tab Bar.

Memo Code Display Area

Memo code records enable the capture and retrieval of guest profile related notes and preferences at a very detailed level. The specific set of memo codes displayed while each tab of the Tab Bar is selected is determined in the configuration of the memo code. Memo code records are displayed in this area of the screen as individual line items. Use your mouse pointer to double-click on any line item to open it and review associated details and notes.

Button Bar

The button bar along the bottom of the guest profile screen provides access to the tools you need to manipulate guest profiles and access profile information.
Create a new profile

Select the **Profile** button from the button bar at the bottom of any Guest Tile. This will access an existing, or automatically create a new guest profile for the active guest.

When the new profile screen is displayed, enter the last name, first name, title, social security number, gender, birth date and any notes desired. The **Suppress Age** checkbox will hide the calculated age on this form and others should this be the guest’s preference.

Select `<PgDn>` to save your changes and continue.

Add a name to a profile

Each guest may have up to nine (9) associated profile names (family members, related individuals) defined. In addition to specific guest preferences for each, the guest’s last name, first name, title, social security number, gender and birth date may be entered for each name added to the profile.

You may attach a profile to a booking using any of the profile names and the preferences associated with the individual name may be considered during the booking process.

The ‘**Add Profile Name**’ button is used to add additional names to the profile.

While viewing an existing profile, select **Add Profile Name**.

The prompt is displayed:

*Are you sure you want to add another profile name? Y/N*

Select the **Yes** button or press the **Y** on your keyboard to create an additional profile name.
Enter the last name, first name, title, social security number, gender, birth date and any notes desired for each guest name added to the profile.

Select <PgDn> to save your changes and continue.

Remove a name from a profile

The ‘Kill (Delete)’ button on the button bar is used to remove names to the profile.

While viewing an existing profile, select Kill (Delete).

The prompt is displayed:

Are you sure you want to (K)ill / Delete this profile? Y/N

Select the Yes button or press the Y on your keyboard to remove the profile name.

Why is the name still there but dimmed?

As in many cases when deleting records in SMS|Host, the record is not entirely removed until an additional step is taken. The record (in this case the profile name) may be restored using the UnKill (UnDelete) command until such time the SMS|Host database is re-indexed using the PACK option.

Re-indexing is usually performed on SMS|Host databases as part of a Night Audit procedure.

More on Guest Profiles

See SMS Document # 1010310, entitled SMS|Host, Guide to Guest Profiles for more information regarding the use of Guest Profile functionality in SMS|Host.

The document is available through SMS Support Services or may be downloaded directly from customer documentation section of the SMS website at http://www.springermiller.com.
Creating a Guest Itinerary

The Booking Center facilitates the creation of complex itineraries. An itinerary may include multiple guests and may be comprised of an unlimited number of itinerary detail line items.

This section walks through the steps In order to follow along you will need to have a basic level of familiarity with the Booking Center interface.

You may wish to review the previous sections Familiarization with the Booking Center Interface and Universal Lookup and Guest Profiles before continuing.

Select a Guest and Profile for the Itinerary

A guest name may be attached to the itinerary at any point in the process of creating the itinerary, but a guest must be attached to the itinerary before it can be ‘Completed’.

Note: Although you may begin making bookings without a specific guest selected, doing so will not allow you to take advantage of any guest preferences specified in the guest’s profile. In order for a guest’s preferences to be considered in the booking process the guest and profile must be selected before adding bookings to the itinerary.

Without a guest attached to the itinerary, the Guest Selection / Information pane will not display any names or profiles, and the Guest button is inactive (dimmed).
Attaching a guest to the itinerary

Click on the arrow button adjacent to the Guest field in the upper left hand corner of the screen to use the Universal Lookup to locate and attach a guest to the current itinerary. Specify or add your guest(s) and apply the Arrival date and number of nights to the itinerary.

Once a guest is attached, the guest (Primary Profile name) and all associated profile names are displayed. The Guest button becomes ‘active’ so that you may open the guest tile directly from this screen. Guest profile and appropriate preference information will be applied to each booking made from within the Booking Center.

See Universal Lookup on page 27, for more on locating and selecting guest tiles.

Working with Multiple Guests in one itinerary

It is possible to attach multiple guests to a single itinerary. The system provides the ability to match a component of the itinerary to each specific guest.

Select the Add Guest(s) button from the button bar along the bottom of the Booking Center screen. Locate the existing guest or create a new guest tile and select it to add it to the itinerary.

In this case we added Tiffany Johnson. Note that the original name is made the “Primary” name on the itinerary and because there are no saved Profiles for Tiffany, the option to create one is presented. See Guest Profiles on page 30, for more information on adding and editing guest profiles.
Create and add Bookings to the Itinerary

Booking a Guest Room

The Guest Room tab enables you to add a room reservation to the itinerary. The Booking Center uses the same criteria as the F5 Rate Calculator.

Select the Guest Room Tab to access the filters and controls needed to locate rates and add a guest room booking to your itinerary.

Filter for Rates

There are several filters available in the center section of the screen to assist in defining the booking and narrow the number of Rates returned in the Rate Result Set.

Note: Arrive, Depart, and Adults (# of) fields, are required and must be populated before any rates can be calculated or displayed.

See Rate Filters on the Guest Room Tab for a full description of each of these filters.
Display Available Rates

After specifying your criteria in the filter fields you will request and review available rates. There are several options available to affect how the rates are presented.

<table>
<thead>
<tr>
<th>Currency</th>
<th>Select currency in which to display rate values. Default is $US.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Override Restrictions (checkbox)</td>
<td>Check this box to display restricted rates. Note: This checkbox and option is only available if the current user has clearance to override rate restrictions.</td>
</tr>
<tr>
<td>Display One Row per Rate (checkbox)</td>
<td>Check this box to display each unique rate on a single row in the result set. You may then double-click any row / rate to drill down and view available room types (as in the F5 Rate Calculator.)</td>
</tr>
<tr>
<td>Dynamic update (checkbox)</td>
<td>Check this box to activate the dynamic update feature. The Dynamic update feature enables the system to begin displaying rates as soon as filter conditions are entered. Note: While this eliminates the need for manually updating the result set, with a large number of rates it can slow the booking process as the system will wait to update the results list each time criteria is changed.</td>
</tr>
<tr>
<td>Column Selector</td>
<td>Choose from several presets to determine the columns displayed.</td>
</tr>
<tr>
<td>Zoom</td>
<td>Select Zoom to drill down into the selected rate and view details regarding its configuration, deposit requirements, and value.</td>
</tr>
<tr>
<td>Quotes</td>
<td>You may quote a guest a rate and save it for future bookings. Quotes are stored and quote numbers are automatically assigned. When you select the Quote button you are prompted as follows: Scan for Quoted Rate or Quote the Rate (S/Q)? Scanning enables you to look up a previously saved rate and apply it to this booking.</td>
</tr>
<tr>
<td>Get All Rates</td>
<td>Select this button to return a listing of all available rates based on the selected criteria.</td>
</tr>
<tr>
<td>Get Next 25 Rates</td>
<td>Select this button to return only the specified # of rates. Note: The number to be returned is configurable through Misc. Rates &amp; Defaults, menu path F.L.U.2. “The Number of Rates Returned in Booking Center (1 THROUGH 7000).</td>
</tr>
</tbody>
</table>
Reviewing and selecting Rates

If a rate is available for more than one unit, that rate will be displayed multiple times. Once for each type for which it is available along with the number of units that are available to rent.

The scroll bar on the right indicates that there are more rates and/or packages than can be viewed on one screen. The up and down arrows will also work to display more rates and/or packages.

Double clicking on one of the rates will add the room reservation booking to the itinerary.

The booking will be displayed in the itinerary grid. The itinerary will be given a number and the system will start the itinerary clock. The amount of time the user has to complete the booking is displayed in the upper left hand corner of the screen above the guest name.

Bookings will display in red if there is a booking rule condition that has not been met by the booking. Right clicking on the booking and selecting View Failure Reason will display a form with the particular rule condition which has not been met.
Each failure reason will indicate the level of override necessary in order to complete the booking without ‘fixing’ the booking first. Each user is assigned an override level. The override level assigned to the user is displayed at the top of the screen. Placing a check mark in the override box on the left, will allow the user to complete the booking without fixing the failure reason.
If the failure reason is simply overridden the itinerary line item is highlighted in yellow.

To address the failure reason, the reservation needs to be accessed. In this instance, the reason for failure was that the system requires that the market segment, source code and guarantee code fields be completed.

Double click on the reservation to open the reservation and enter data into the required fields.

Once the reservation is displayed, clicking on the edit button and pressing the page down key will prompt the user to fill in the required fields. Press **Escape** to return to the Booking Center and complete the booking.

The red warning color is now removed from the booking line item indicating that the failure reasons have been corrected. Clicking on the **Complete** button will mark the itinerary as ‘completed’. 
Completing the Itinerary

When new line items are added to the itinerary, the itinerary must be “completed” again. As soon as elements are added to the itinerary, the itinerary time out clock starts to count down once again. It is important to remember to Complete the itinerary again; otherwise, the changes will be lost.

Activating the Complete button will once again, stop the clock and mark the itinerary as ‘Completed’.

Confirming the Itinerary

The Confirm command button is available once the itinerary has been tagged “Completed”:

Activating this button will launch the confirmation process for all bookings contained within the itinerary. If there are reservations that require a deposit, the system will prompt for those deposits. If multiple bookings require a deposit, the system will prompt the user to confirm each booking in sequence.

Note: Resort Scheduling and Golf Tee Time bookings will automatically be confirmed. There is no option at this time to take deposits for any Resort Scheduling bookings.
The system will open the Posting dialog and prompt for a transaction code as shown below.

Enter or select the appropriate transaction code. Selecting the down arrow in the transaction code field will provide a list of available codes.
The fields on the Bills form are detailed in the table below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Amount</strong></td>
<td>The Amount field is populated automatically depending upon defined deposit policies.</td>
</tr>
<tr>
<td><strong>Auth/Charge</strong></td>
<td>The Auth/Charge field accepts either an A for authorization or a C for Charge. This would be an actual charge to the credit card, so it would be appropriate to enter a C into this field.</td>
</tr>
<tr>
<td><strong>Folio</strong></td>
<td>This is the folio number to which the charge will be posted. This defaults to folio #1.</td>
</tr>
<tr>
<td><strong>Reference</strong></td>
<td>This field is rarely used; however, it will accept a 7 character alphanumeric entry. The information entered here can be viewed with reports only.</td>
</tr>
<tr>
<td><strong>Tax/Gratuity/Total</strong></td>
<td>These fields are non-editable. They are simply displaying what will be posted to the folio.</td>
</tr>
</tbody>
</table>

The following prompt appears at the bottom of the screen:

**Correct Yes / No (Y/N)?**

If the amount to charge is correct, respond to the prompt by typing Y into this field and continue with the confirmation process.

If confirming with a credit card, the system will prompt the user to enter the credit card number, expiration date and the CVV2 number. The CVV2 number is found on the back of the credit card. This field is not a required field.
Confirmation Correspondence

If you are running Visual Correspondence and your SMS|Host system is set to create an automatic confirmation letter (or email) upon completion of a Guest Room booking the Pending Letters screen is displayed next.

See the SMS|Host Guide to Visual Correspondence for more information on setting up and managing your confirmation notices.

Canceling the Itinerary

The Cancel Itinerary button is available after the itinerary has been “Completed.”

Selecting the Cancel Itinerary button will launch the cancellation process. All reservations will be cancelled. Any resort scheduling bookings attached to the itinerary will also be cancelled provided your system is set up to do this. You also have the option to unlink the bookings from the itinerary during the cancellation process. It is recommended that you do not unlink. This will delete the itinerary and make it impossible to find the itinerary from the booking center at a later point.

Note: Any bookings that have balances will need to be cancelled individually. This means that the right click option from the individual booking will need to be used.

The system will prompt...

This will cancel all itinerary bookings that are completed. Are you sure you wish to continue Yes / No (Y/N)?

Selecting Yes will prompt the following...

Do you want to unlink the cancelled bookings from the itinerary Yes / No (Y/N)?

Regardless of how the question is answered, the system will begin the process of canceling all bookings within the itinerary.
If your system is configured to use Cancellation Codes, you will be prompted to select from a pre-defined list of cancellation reason codes.

To select, enter the sequence number into the sequence number field using the keyboard or simply click on the appropriate sequence number in the scan list.
The option to enter a free form reason in addition to pre-defined reason codes is presented only if the system is configured to prompt for them.

Since the booking is a reservation that was confirmed and a deposit was taken, the booking will not be cancelled. The Itinerary Cancel form above shows what was cancelled, what was not, and the reasons why.

To cancel a reservation that has a balance, right click the booking line item and select Cancel Booking. Select Cancel and Unlink from Itinerary to unlink the booking from the itinerary when canceling.
The user will be prompted to select from a pre-defined list of Lost Business codes when selecting the option to cancel the individual bookings themselves. These are different from the cancellation reason codes.

Once the Lost Business code is selected, the system will prompt the following:

This reservation has a non-zero balance. Are you sure you wish to cancel this reservation Yes / No (Y/N)?

Depending on whether or not the system is set up to allow canceling with a balance will determine whether or not the user is prompted to distribute the deposit on the account.
The system displays the amount that needs to be distributed and provides the ability to **Credit** the reservation; which would leave the deposit amount on the reservation, **Refund** the amount; which would create a cancellation refund check in the system, or **Forfeit** the deposit; which would post an off-setting charge to the reservation. Any combination of the above may be selected for all reservations. The amount distributed cannot be more than the system indicates the **Amount to distribute**.

**Note:** The CREDIT option will not invoke the Credit Card functions. The only way to give the guest a credit to their credit card would be to access the reservation and use the Bills command and select the appropriate credit card transaction code.

If the reservation is due to arrive today, the system will prompt:

**Is this a No-Show Yes / No (Y/N)?**

At this point, the user will be prompted to select from the pre-defined list of cancellation reason codes. The list provided will only include reason codes that are specific to reservations at this point.

The user will also have the opportunity to enter a free form cancellation reason if the system is configured to do so.

Once the reservation has been cancelled, the itinerary will no longer display the cancelled booking. Note the check box labeled **Display Cancelled Bookings**. Placing a check mark in that field will display any cancelled bookings on the itinerary.
Booking a Spa Appointment or Resort Activity

To access Resort Scheduling from within the booking center, the **Resort Scheduling** tab must be selected on the bottom grid.

When creating bookings for either Resort Scheduling or Golf Tee times, it is important to remember to select a Profile from the list if there is more than one profile name. This ensures that the booking is attached to the appropriate person.

Select a profile name from the Guest Selection / Information pane.

Once a profile is selected, any related preferences from the profile are displayed.
The calendar date defaults to the arrival date selected in the **Master Date Range**. Clicking on one of the dates inside of the calendar will allow a booking for a different date - provided the date selected is within the **Master Date Range**.

Displayed Availability will update immediately upon selection of a new date.

The system has the ability to filter employees based on the preferences of the profile selected. Because the profile selected has a **Female Employee** request, the system will automatically filter and display only female employees.

Additional filters available for **Facility** and **Categories**.

**Facilities**  
Facilities are a 3 character alphanumeric code. Facilities are the physical locations where services take place. A facility could simply be **SPA** or **GTT** for golf, but the facilities can also be more specific if your property is configured for multiple spas or golf courses.

**Categories**  
Categories are based on two (2) character alphanumeric codes. Categories are a way of grouping similar services together. For example, all Massages could be classified under **MS** for Massage. Categories make it easier when booking as they allow the user to narrow down the list of services from which to choose.

The grid at the bottom displays availability for the services selected. The service description is displayed on the left hand side of the screen. The time of service is displayed across the top. To scroll to later times, the scroll bar at the bottom of the screen can be used or the user can click on one of the day part filters next to the calendar. There is a day part filter for **Day**; which would show the entire day in a compressed format, **AM**; which displays the first time in the morning that a booking may be made, or **PM**; which would display times beginning at 12pm.
The availability grid in the bottom pane may be interpreted as follows:

<table>
<thead>
<tr>
<th>White Area</th>
<th>White blocks indicate that a booking cannot be made at this time. There may not by resources or employees available to perform the service at this time.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Box (no number)</td>
<td>A blue box without a number in it indicates that a single booking for the associated service may be made.</td>
</tr>
<tr>
<td>Blue Box w/number</td>
<td>A blue box that contains a number indicates that multiple bookings may be made for the associated service. The number inside the box indicates the number of bookings that may be made at that time.</td>
</tr>
</tbody>
</table>

To book an appointment at a particular time, locate the time and service and double click in the box and the booking will be added to the itinerary.

The booking has been made and a line item added to the itinerary. The booking is linked to profile 1. Note that this line item has a time attached to it. This is an easy way to know that it is either a Golf Tee Times booking or a Resort Scheduling Booking. The S in the TY field indicates that it is a Resort Scheduling booking.

As with room reservations, if the booking is red, then a booking rule has been broken. The failure reason can be viewed the same way as the failure reason on a room reservation; right click and select view failure reason. If the user doesn't have the clearance to override the reason for failure, the booking must be accessed and fixed.
Viewing the Resort Scheduling Booking

Double clicking on the resort scheduling itinerary line item will display the booking form with full details.

Clicking on the **Edit** button will allow the user to access the booking to resolve the booking rule violated in the process of creating the booking.

The employee and the resource assigned to the booking may be viewed from this screen, as can the cost of the service.

The system allows the ability to attach Market Segment, Sub-Market, and Source code to the booking.

Use the **Escape** button to return to the itinerary.
Booking into a Resort Scheduling Class

To access classes from within the booking center, the **Resort Scheduling** tab must be selected on the bottom grid and the **Classes tab** must be selected.

The steps to creating a class booking are similar to those used to create an individual resort scheduling booking.

When creating bookings for either Resort Scheduling or Golf Tee times, it is important to remember to select a profile from the list if there is more than one profile name. This ensures that the booking is attached to the appropriate person.

Clicking on one of the profile names in the upper left hand corner of the screen will select that particular profile.
Once a profile has been selected, the preferences for the profile are displayed on screen in yellow.

The date selected in the calendar will be based on the arrival date selected in the Master Date Range. Clicking on one of the dates inside of the calendar will allow a booking for a different date provided the date selected is within the Master Date Range.

Availability will update immediately upon selection of a new date and/or class.

Additional filters exist for Facility and Categories.

**Facilities**  Facilities are a 3 character alphanumeric code. Facilities are the physical locations where services take place. A facility could simply be SPA or GTT for golf, but the facilities can also be more specific if a property is going to have multiple spas or golf courses and a facility has been purchased for each.

**Categories**  Categories are a 2 character alphanumeric code. Categories are a way of grouping similar services together. For example, all Massages could be classified under MS for Massage. Categories make it easier when booking. They allow the user to narrow down the list of services from which to choose.
Adjacent to the calendar are the Adult/Child/Other fields. Classes that are associated with products will often have prices that vary based on the type of guest. The cost of the service/class will update immediately when additional people are added to the booking.

To book the selected guest into the class, simply double click on the Product and the class will be added to the itinerary.

As with room reservations, if the booking is red, then a booking rule has been broken. The failure reason can be viewed the same way as the failure reason on a room reservation; right click and select View Failure Reason. If the user doesn’t have the clearance to override the reason for failure, then the booking must be accessed and fixed.
Viewing the Resort Scheduling Booking

Double click on the resort scheduling itinerary line item to open the booking form and display the details of booking.

Click on the Edit button to access the booking to fix any booking rule violated in the process of creating the booking.

The Escape button may be used to return to the itinerary.
Booking a Tee Time

Select the **Tee Times** tab to access Golf Tee Times booking functionality in the Booking Center.

The Golf Tee Times tab has a calendar similar to that of the Resort Scheduling tab. The default date is the same as on the Resort Scheduling tab and should match the first date of the Master Date Range. The calendar functions the same as in the Resort Scheduling tab.

Below the Calendar is a **Course Grid**. This grid allows the user to select the course for which to view available tee times and the rates associated with those times.

Next to the Course Grid is the **Day Part Grid**. Tee times can be associated with Day Parts as can rates.

**Players**
The number of players selected will determine which tee times are displayed in the **Availability Grid**. When 4 players are selected, the system will display times when 4 players can book a tee time. When 3 players are selected, the system displays times where either 3 or 4 players can play. When 2 are selected, the system will show times where either 2 or 4 people can play. When 1 player is selected, the system displays times where 1, 2, or 4 people can play. This is done to try to help maximize available tee times.

**#Days**
If 1 day is selected, the system displays availability for only that day selected. If more than one day is selected, then you see availability for that number of days beginning with the date selected in the calendar.
**Hotel Guest, Day Guest, Member**

If **Hotel Guest** is selected, available rates will display for guests with hotel reservations.

If **Day Guest** is selected, available rates will display for any guest who is neither a member nor who is staying at the property.

If **Member** is selected, available rates for members will display.

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**Use Rate Filters (check box)**

Enabling this setting will cause the system to display only tee times with a rate available for the type of guest selected. For example, if member is selected and there are no member times available for any of the remaining tee times, then no times would appear in the **Availability Grid**.

---

**Columns displayed in the Availability Grid**

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course</strong></td>
<td>The course for which the time is available.</td>
</tr>
<tr>
<td><strong>Date</strong></td>
<td>The date the tee time is available. Multiple dates can be displayed in the Availability Grid based on the number of # days field.</td>
</tr>
<tr>
<td><strong>Time</strong></td>
<td>The tee time.</td>
</tr>
<tr>
<td><strong>DPT</strong></td>
<td>This is the Day Part. Remember that both tee times and rates can have day parts attached to them. The day part is used to filter out tee times. A common day part might be <strong>Twilight</strong>.</td>
</tr>
<tr>
<td><strong>HL</strong></td>
<td>First hole to be played (usually 1 or 9).</td>
</tr>
<tr>
<td><strong>Open</strong></td>
<td>Number of players this tee time can accommodate.</td>
</tr>
</tbody>
</table>
Selecting a Tee Time

Once a tee time has been located, clicking once on the tee time will display the available rates for that tee time.

Once the tee time is selected, the rates available for that time will display in the **Available Rates Grid**. This grid will display a list of all rates available at that time. It will tell you the price per player and the total based on the number of players selected in the **Player** field.

Double clicking on the rate will create the Golf Tee Time Booking.
As with Room Reservation Bookings and Resort Scheduling Bookings, Golf Tee Times bookings are also color coded. Red indicates that a booking rule has been broken and must be fixed prior to completing the itinerary. If you have the proper level of user clearance, the option to right click and **view the failure reason** will display the reason for failure. The reason for failure can then be overridden and the booking will turn yellow. In this particular case the tee time requires a hotel reservation for it to be booked.

If you do not have the clearance to override the booking rule failure, you will need to modify the booking and resolve the issue. Double-click on the itinerary line item to open the booking form.
For this example the guest decides to book a room reservation as it was confirmed that a tee time would be available. However you notice that the tee time booking is still red. Because the lodging reservation was booked after the tee time it must be linked to the tee time manually. To link the tee time you need to click within the “Res” column (clicking to within the far right of the column works best) to launch a pull-down container which will list all reservations within the Itinerary to which the tee time can be linked.

Select a reservation to apply to the tee time and the course booking rule will immediately be resolved as seen in the following screen shot:
Double-clicking on the tee time itinerary line item will open the tee time booking form as displayed below. Any further edits such as player information details may be applied to the booking.

Details such as player information may be applied to the Tee Time booking through this form.

Press <Esc> to return to the Itinerary when you have finished editing the booking information on this form.
Booking a Fine Dining Reservation

Select the Dining tab to access the functionality needed to create dining reservations.

Dining reservation information is displayed and the calendar defaults to the first date of the Master Date Range.

First, select a (or confirm the default) date for the reservation and the number of people dining.

Second, select a service from the Dining Services grid.
Third, double click on the time and date in the **Availability Grid** to create a line item in the active itinerary.

Once the booking has been made, the remaining number will decrease. If the booking is cancelled for any reason, the table will be released back to availability.

As with all other bookings created in the booking center; if the booking violates a predefined booking rule, then the booking line item is highlighted in red and you will not be able to complete the itinerary. Right clicking and selecting, **View Failure Reason** will display the rule that was violated. If the booking rule is overridden, the booking will highlight in yellow. If you do not have the clearance to override the booking rule, then the details of dining booking must be inspected and modified.

Double click on the dining itinerary line item to open the booking form.

Make any necessary modifications and then press the **Escape** button to return to the itinerary.

The itinerary time-out clock will reset and begin to count down until the itinerary is abandoned or completed.
Booking a Vendor Activity

To access Vendor Activities from within the booking center, the Vendor Activities tab must be selected.

Similar to other tabs, the Vendor Activities tab has a calendar control for selecting / changing dates. The date defaults to the first date of the **Master Date Range**.

Below the Calendar is the **Quantity** field. This allows the user to book several activities of the same type at the same time. Prices are generally based on the # of people.

Below the Quantity is the **Time** field. Specify the time the guest wishes to participate in the activity.

To the right of the Calendar is the **Activity Category Grid**. This grid displays the various types of activities that are available for that particular date.
Once the Activity Category has been selected, the Vendors that offer that particular type of service display in the Activity Vendor listing.

Double click on the desired Vendor to add the Vendor Activity booking as a line item in the active itinerary.
As with all other bookings created in the booking center, if the booking breaks any of the booking rules, the booking will be highlighted in red. Right-clicking and selecting, View Failure Reason will display the rule which was violated. If the booking rule is overridden, the booking will turn yellow. If the user does not have the clearance to override the booking rule, the dining booking must be accessed and fixed.
Viewing the Vendor Activity Booking

Double clicking on the vendor activity booking will access the booking so that it may be edited.

Press the **Escape** button to return to the itinerary.

The itinerary clock will rest and begin to count down as the itinerary now needs to be completed.

**Note:** It is not necessary to choose the **Complete** option after every booking is added. It can simply be completed when all bookings have been added to the itinerary, however it is important to note that if an itinerary had been previously completed and another booking is added to the itinerary at a later date, then the itinerary needs to be completed again.
Review the Itinerary

The Booking Information tab provides details related to each of the bookings within the itinerary. Move the mouse pointer over the itinerary line items to inspect the details of each.

The left hand column displays guest information including the guest name and guest number along with some basic profile information. The center column displays information specific to the booking itself. The information displayed varies based on the type of booking. Information displayed includes arrival, departure, room type, # of people, rate code and value for a room reservation. Service, resource, employee, cost, and duration are displayed for resort scheduling bookings, golf tee times bookings, and dining bookings.

Confirmation Number / Unique ID

A unique Reference ID is assigned automatically to each itinerary. The ID can be used as a record locator and confirmation ID for the guest. Itineraries may be recalled for viewing via the Lookup Itinerary button and/or editing using the Reference ID.
Manager / Administrative Tasks

Configuration of Booking Rules

The configuration of Booking Rules is a task reserved for management and system administrators with a working knowledge of the SMS|Host system and a basic understanding of the FoxPro scripting language.

Note: A number of pre-defined booking rules are provided by SMS as part of the upgrade to SMS|Host v16 and higher. These rules are disabled by default. You may wish to review these examples, edit them to suit your needs, and enable them for use at your property.

Create a new Booking Rule

The Booking Rules configuration screen is accessible from the main menu in visual SMS|Host by selecting Configuration, then Booking Rules Setup.
**For each Booking Rule:**

- Add a Name / Description to refer to this rule.
- Check the box to the right of the description to enable (uncheck to disable) this rule.
- Set the Booking Date range to define the booking dates to which this rule will apply.
- Set the Arrival Date range to define the arrival dates to which this rule will apply.
- Select the appropriate Booking Type radio button to specify the booking types to which this rule will apply.
- Booking Window – Min / Max. Specify a minimum and maximum number of days to create rules that take affect relative to the current date (creating a ‘Days out’ window). **Example:** Consider a golf course that will give members preference in booking tee times 5 to 10 days in advance. This could be accomplished by creating a booking rule that requires that the person booking the tee time be a member and setting the Booking Window Min field to 5 and the Booking Window Max field to 10.
- Define a Guest Override Clearance level (0-9) to correspond with a similar level assigned to each guest. If the guest’s level exceeds the rule setting then this rule is not enforced.
- Define a User Override Clearance level (0-9) to correspond with a similar level assigned to each user. If the user’s level meets or exceeds the rule setting then override is possible.
- Specify the Booking Rule Expression.

**Booking Rule Expressions**

Booking Rules are created by building logical expressions to describe the failure condition of your restriction to the system. Expressions used in Booking Rules are written in FoxPro Programming Language using the FoxPro Expression Builder.

**Note:** Building expressions in FoxPro requires a basic understanding of the FoxPro scripting language and a familiarity with the SMS|Host data structure.

**Permissions and Overrides**

**User Code based Permissions**

Individual users may be restricted from or granted permission to override Booking Rules. Each booking rule has a user override level. If the user’s level meets or exceeds the level defined on the booking rule, the rule can be overridden at the time the booking is made.

User levels are setup through User Clearances (character menu path F,J,9) to control the users ability to create and override rules. See User Clearances (F,J,9) above.
Guest Level based Permissions

Levels field on Guest Tile

Special guests may be included or excluded from booking rules. A booking rule may be configured in such a way that special guests may be made exempt from specific rules based on the Guest Level setting on the Guest Tile.