Learning Five Star

Banquet & Catering Software

Five Star Hotel Systems Corporation

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Setting Up Banquet & Catering

Five Star's Banquet & Catering module manages room configurations, scheduling, equipment and services with integration to the Hotel Front Office management, Food & Beverage, Sales Analysis and Accounting modules. For promotional purposes, sample photos of room configurations are available for your guests' usage.

Our Banquet and Catering System is suited for the Hotel that wishes to eliminate manual Booking and the related inefficiencies associated with this function. Your Guests will have instant answers as to availability and status.

This application manages the system from a temporary hold, to a formal booking, through to the final billing and transfer to Act! 2000tm, if applicable. Bookings might include time confirmation, menu consultations, adjustments and bookings, and reservations of inventory items (e.g. projector, linens), as well as third party services (e.g. bands, flowers).

For the Hotel staff it provides the necessary function sheet to advise the kitchen, beverage services, housekeeping, and maintenance of their required services.

Since the Five Star system is completely integrated it offers many advantages, compared to stand-alone or interfaced systems, because all integrated areas, such as room inventory, guest accounting, labor costing, and POS are updated as a byproduct of this module.

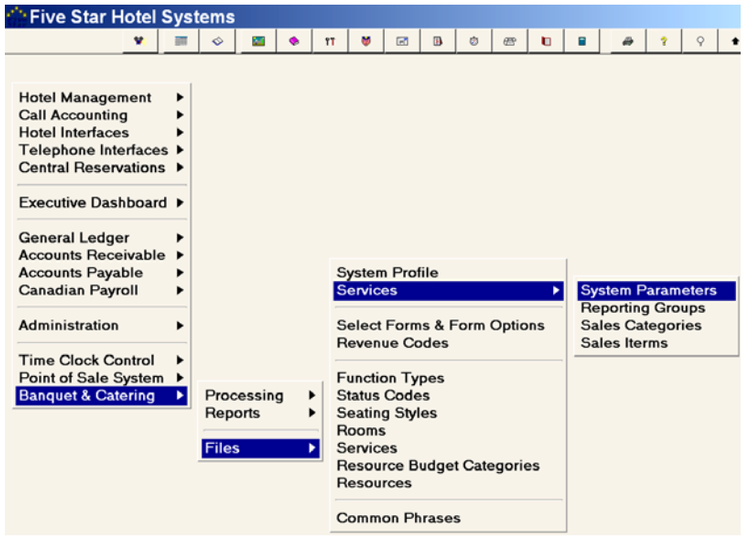


Figure: Main Menu

The module contains three main menus:

Processing - day-to-day input operations

Reports - reports, documents and graphs

Files - to describe how the system will operate

To set up your property, choose “Files”.

This screen provides all of the setups you require to maintain the Banquet software. This includes integration features into the other modules (i.e. GL/POS/Hotel) as well as setups for rooms, layouts, status codes, function types, and resources.

Before you set up the profile, a few items need to be verified and/or setup. Following these steps will make your installation easier to understand.

Set up Criteria:

If not already set up, you will need Hotel Billing Codes for Room Revenue, Food & Beverage Revenue, and Resources (or Equipment) Revenue. These Billing Codes will be attached to specific revenue and equipment codes in the Banquet module. You can create as many billing codes fore each of these three revenue areas, or you could keep it simple and have just a few. Since Billing Codes send transactions to the Five Star General Ledger, and other general ledger systems, you should have at least one billing code for each general ledger account you use for banquet and catering revenue.

The Banquet & Catering program uses files that the Five Star Point of Sale program also uses. These files are set up either on the Banquet & Catering Food Services menu or on the Point of Sale System Administration menu. If you use both programs you can make changes on either screen.

If you already use the Five Star Point of Sale program you can skip the steps in setting up the services programs, although you may still need to add sales items that are applicable to the banquet and catering area of your property, as they may be different from the sales items sold in your dining room or bar. If you already have banquet items set up and you use the point of sale program you can skip the services menu. If you do not use the Five Star Point of Sale system, the following four steps need to be set up. You can minimize the data setup to just what you need for banquet & catering, even though the screens allow you to enter more information that is applicable to a dining room or bar.

Food Services System Parameters

The Food Services system defaults are set up in the System Parameters screen. If you already use Five Star Point of Sale for banquet items you can skip this step, or you may need to add a new sales area called Banquet & Catering if you have not already done so. Choose the System Parameters program from the Food Services menu. You will need to set up the sales area line but you don't have to pick a menu. You will also have to set up taxes from this screen.

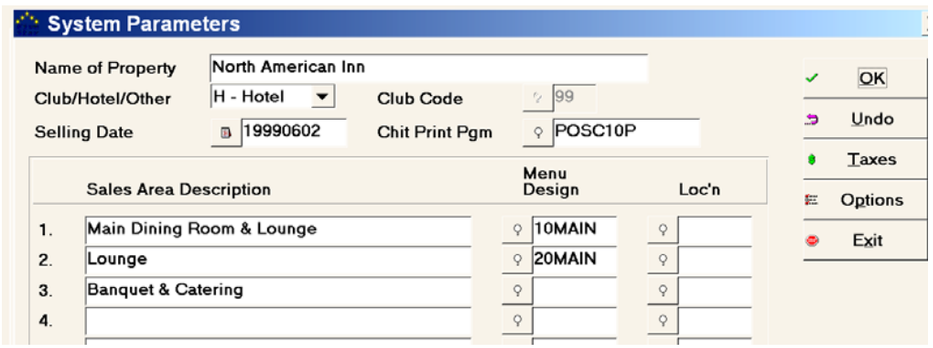


Figure - System Parameters

Using the screen:

If you already use the Five Star Point of Sale program this screen will already be partially or fully set up. You simply need to add a sales area called Banquet & Catering (or the like). If nothing is set up yet, follow these steps.

Name of Property: Enter the hotel name.

Club/Hotel/Other: Enter H.

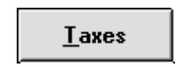
Selling Date: Skip over this field it is used only for Point of Sale and not by Banquet & Catering.

Company code: Enter the code that you use for your Company. This must be the same number as you have entered in the Accounting Company field of the General Hotel Profile screen of the Hotel Setup menu on the Hotel Management Menu.

Chit print program: Skip this field. It is used only for Point of Sale and not by Banquet & Catering.

Sales Area Description: If you are using only the Banquet & Catering Program, and not the Point of Sale Program, enter just the word Banquet on the first line.

Menu Design: Leave the menu design blank. It is used only for Point of Sale and not by Banquet & Catering.



From the button bar, select the Taxes button.

Taxes: A different Tax Table must be set up for each group of taxes. This includes tax rules for food and liquor. For example, in your area you might have the following rules:

- alcohol has a sales tax rate of 10% and food over $3.99 is 8%.
- federal tax is always 7%.

In this case, we need to set up at least 2 Tax Tables. One for the Bar with sales tax=10% + federal tax=7%; and one for Food with sales tax=8% if minimum amount of tax is $.32 + federal tax=7%.

This screen is also used to define automatic gratuities such as the 15% gratuity added to the bill automatically. If there is a Service Charge involved, there may be another Tax Table where some items are applicable to Service Charges and other

items are not, for example sundry items. All three of the taxes (service charges) are set up in each Tax Table, as required:

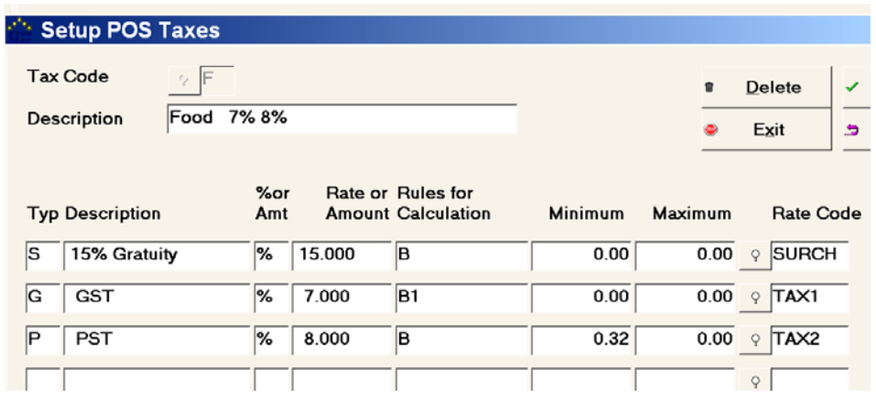


Figure: Setup POS Taxes

Using the screen:

Tax code: Enter a Tax Code for this Tax Table.

Description: Enter a description of this Tax Table.

Keep the Tax Table uniform. For example, if Line 1 is used for Service Charge for this Tax Table, use line 1 for the Service Charge for all of the Tax Tables.
Type: Enter S to indicate a Service Charge, G for GST, P for PST, R for Gratuity, O for Other, or D to delete the current row.

Description: The Description should also be uniform from Table to Table.

Rate or Amount: Enter a % sign if this code is a percentage calculation. Service charges and taxes are usually entered as a percentage. Enter an A if the row is a dollar amount.

Rate or Amount: Enter the rate. For example, if it is 10%, enter 10 (not .10). If the previous field has an A in it the figure you enter here is a dollar figure.

Rules for Calculation: The Rules for Calculation refers to "what is this being charged on?" If it is being charged on the base (net) amount, enter B. If, for example, GST is being charged on the Base Amount plus the Service Charge (and Service Charge is on Line 1), enter B1. The typical entry with a gratuity and two taxes in Canada is shown in the example above.

Minimum: If there is a minimum amount before this tax should be calculated, enter the minimum amount of tax. As in our above example, PST is only charged in Ontario if the food order is a minimum of $4, you will enter .32 (8% of $4).

Maximum: If there is a maximum amount of tax that should be charged, enter that amount here.

Enter the Billing code that you wish the applicable taxes to be posted (usually a liability account).

Reporting Groups

Report Groups apply only to the reporting system of the Point of Sale program, but must be set up before you can create sales categories. Therefore if you do not use the Five Star Point of Sale system we suggest you create only one report group called ALL. If you do use the Point of Sale system we suggest you create a Report Group called Banquet Food and one called Banquet Alcohol.

To set up report groups, select the Reporting Groups program from the services menu. Enter the desired codes and descriptions for your Reporting Groups.

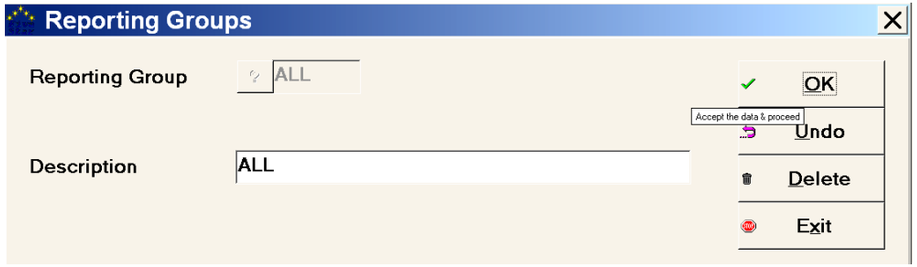


Figure: Reporting Groups

Sales Categories

The sales category program defines the tax rules that will be applied to all sales items that are included in each category. Therefore as a minimum you need a category for each set of tax rules you set up in the taxes screen. For example you may have sales categories for liquor, which has liquor taxes, applied, and for food, which has a different set of rules applied.

Secondly, the sales category program links the sales items to your billing codes in the hotel program. Therefore you need at least one sales category for each billing code, and you need at least one billing code for each general ledger account that shows revenue for the banquet area.
To set up sales categories, select Sales Categories from the POS administration menu:

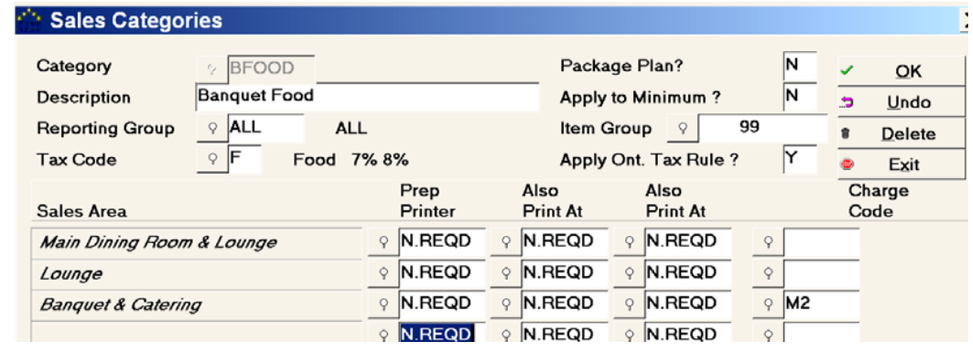


Figure - Sales Categories

Using the screen:

Category: Enter a code for the Sales Category you wish to set up. We suggest that if you also use the Five Star Point of Sale system make all of your banquet categories start with a B for Banquet. This way the sales of food items in the point of sale system will display banquet items in a section of any POS reports.

Description: Enter a description for the Sales Category.

Reporting Group: Use the search icon or press F2 to select, or enter the desired Reporting Group.

Tax Code: Use the search icon or press F2 to select, or enter the desired Tax Code applicable to this Sales Category.

Package Plan: Skip this field it is used only for Point of Sale.

Apply to Minimum: Skip this field.

Item Group: Skip this field.
Preparation Printer: Skip this field.

Charge Code: Press F2 and select the Billing Code from the front office program that this category should appear as on the final folio after the function has been billed. Five Star posts banquet & catering functions to the front office program folios for final adjustments or any other type of handling.

Sales Items

Sales Items are the individual food & beverage products you sell. This is the screen you do the big job of entering all your foods and beverages. If you have a single food item like club sandwich that you sell for a different price at lunch and at dinner you set the item up twice, once for each price.

To set up sales items, select the Sales Items program form the POS administration menu:

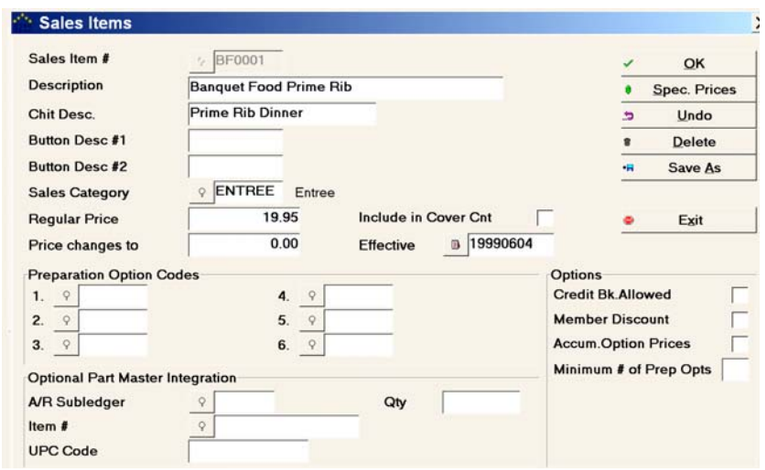


Figure - Sales Items

Using the screen:

Sales Item #: Enter a code to the Sales Item you wish to set up. We suggest you use letters to match the sales categories followed by numbers. For example all items should start with B if you also use the Point of Sale system. Then make the next letter the first letter of the sales category. Then follow with a 4-digit number. Thus banquet food would start with a code like BF0001 then BF0002. This way you can use the speed search capability to quickly find the things you are looking for. If you don't use the Point of Sale system the B is redundant. Thus you might use F001 for the first food item and L001 for the first liquor item.

Description: Enter the item description you wish to see on your report.

Chit Desc: Enter the item description you wish to see on the guest bill.

Button Desc #1: Skip this field.

Button Desc #2: Ship this field.

Sales Category: Use the search icon or press F2 to select the Sales Category you wish this Sales Item to belong to.

Regular Price: Enter the regular selling price of this item.

Price Changes to:, Effective: If you are changing the price of this item in the future, you may enter the new price and date it will be effective. Otherwise, leave it blank. This may be changed at any time. This feature sets the POS system apart from others because without it, you must stay up all night the day you change your prices, after the old prices expire, and before your new prices take effect. By setting new prices up in advance, you have plenty of time to make the changes.

Skip all the rest of the fields as they are used only for the point of sale program.

When you have set up all your sales items you have completed the setup of the food services section. You can return to the Banquet & Catering Files menu for the rest of the setup.

Setting up the Banquet & Catering Profile

Choose the System Profile option from the Files menu:

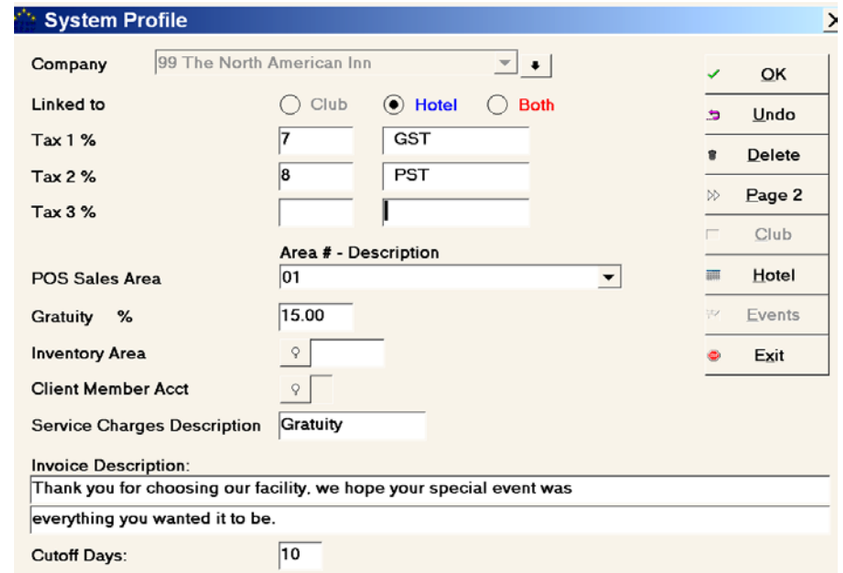


Figure: System Profile

Using the Screen:

Company code: This must be the same code as you have entered in the Accounting Company field of the General Hotel Profile (found on the Hotel Setup Menu on the Hotel Management Menu).

Linked to: Click on “Hotel”.
Taxes: Enter the default percentages and descriptions for the taxes. Do you have various tax rates for your POS, rooms and resource items? If so, you will activate the POS Tax rule flag in the next screen. A detailed discussion of this option will be provided there.

POS Sales Area: Choose the appropriate POS area to link the POS. This is used to pull in the service items (i.e. food/beverages) as well as to update the statistical data (i.e. revenue stats) and revenue Billing Codes.

Service Charge (Gratuity/Facility Fee) Percentage: Enter the default percentage for the Service Charges/Gratuity/Facility Fee. Note that the description of this item may be changed, depending on your terms. The last field in this screen allows you to identify your term to be used throughout the module. Notice that entering your description will change the description of the percentage field.

If you have different percentages for Rooms vs. Services vs. Resources then set this percentage to ‘zero’. The next screen will allow input for your various percentages.

Inventory Area: This feature is not presently activated.

Client Member Account: Skip this field.

Service Charges Description: This field will allow you to change the terminology for “Service Charge”. For example, some Hotels would prefer to use Service Fees, or Facility Fees. What you enter in this field will change the “Service Charge” term in all your areas of the module.

Invoice Description: This is used if you would like a specific message to print on the bottom of your invoice.

This part of the setup is now complete. There are two other profiles on this screen to complete:

allows you to link taxes, gratuities and discounts to the hotel billing codes.

allows you to customize the Bookings and reports to your specifications.

inactive – used only by our Country Club Clients.

inactive – used only by our Country Club Clients.

In order to make the rest of the set up flow smoothly we will be visiting the other two profile screens after certain setups are complete. Select the OK button to accept the data. This will bring you back to the main Setup menu.

Forms and Forms Options

To choose form printing options, a custom event order or custom invoice form, use the Select Forms and Form Options program:

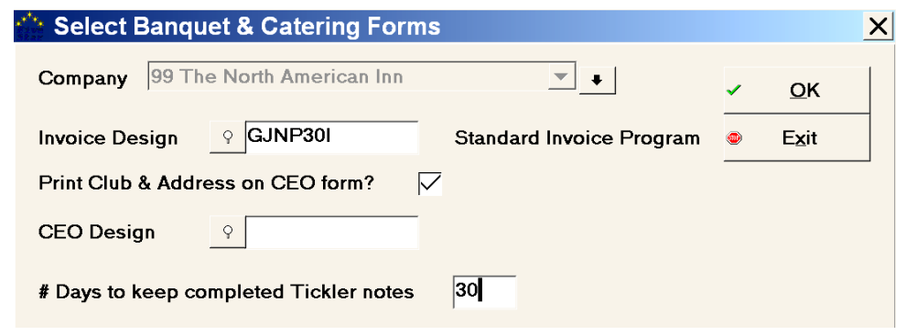


Figure: Select Banquet & Catering Forms

The standard Five Star Invoice Design code, GJNP30I is defaulted. This is a text-formatted invoice form. The default CEO (Catering Event Order) design code is GJNR20A. This is the Five Star standard GUI form. You also have the option of using the GJNR20T form that has been text-formatted. Both forms are available for viewing on the screen as well as for printing to a printer.

If you would like to print the Hotel name and address on the CEO form, activate this feature by clicking the mouse or pressing the spacebar in the box. The name and address will print in the top left of the form. Alternately, you may use the Hotel's letterhead in which case this feature would not be required.

Revenue Codes

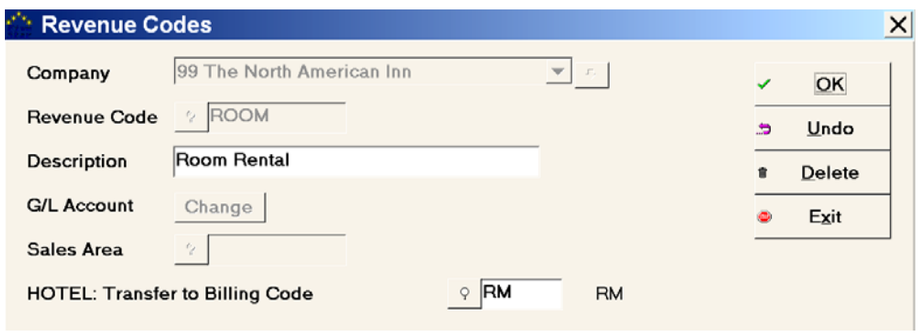


Figure: Revenue Codes

The linkages contained in your POS setup control the revenue linkages for any services (i.e. food, beverages, etc.). Hence we do not need to set up revenue codes for these items. However your Rooms and Resources you will be setting up do not

have automatic Billing Codes. When you are setting up these rules you must have the person in charge of adding new Billing Codes, along with their appropriate financial line presentation, set up the accounts in their Billing & Receipt Code file on the Hotel Management's Hotel Setup menu if they do not currently exist.
You must set up at least one Room Revenue code and a Resource (Equipment) Revenue code and link them to the appropriate Billing Code. Note that you may set up multiple codes with their linkages if you would like a more detailed breakdown in the Daily Revenue Report. For example, instead of having one code for equipment rentals your could have one for general rentals, one for audio visual rentals and one for third party rentals. This will allow for matching revenues to their associated costs for a more thorough analysis. These codes will be used in the Room Setup and Resource Setup screens.

Attach the code to the appropriate Sales Area (Hotel) for reporting purposes. For those of you who have the Hotel module, you will also need to input the Billing code for Banquet purposes.

The following set of items being established is used for describing the features of each Booking:

Function Types

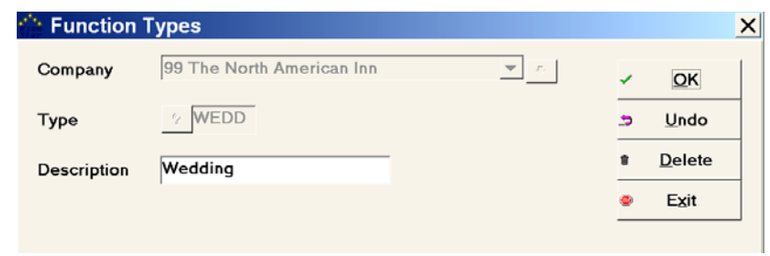


Figure: Function Types

Enter a meaningful code to identify the type of function - e.g. Conf = Conference; Meet = Meeting; Wedd = Wedding. Use all four characters of the field to set up the codes. You will find this helpful when looking at the setup screens. You may add to these at any time as your list of function types grows.

Status Codes

In order to control the standing of each booking setup the Status Codes:

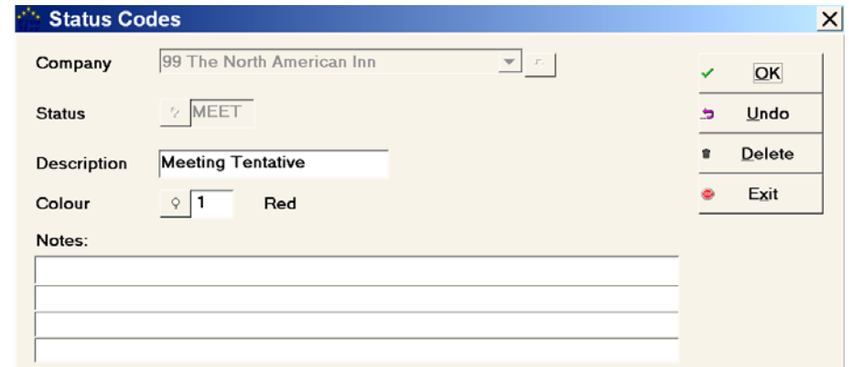


Figure: Status Codes

Enter a meaningful code to identify the status of the function in question. You should set up a minimum of three codes:

Confirmed: this code will be used in the Main Profile and is used with the double Booking flag.

Cancelled: this code will also be used in the Main Profile to identify a Booking that has been cancelled while retaining the main Booking details.

Setup/Teardown: this code will be used to identify additional time to add to the Booking for set up and/or teardown (optional). As with the other codes above, it will be used in the Main Profile screen.

For each status choose a color code (use the lookup for a list) that will identify this type of status. This will be used for the Booking graph to provide a quick visual display.

The Notes field contains four lines to enter information related to the status, and these notes will print on the bottom of the Catering Event Order.

Seating Styles

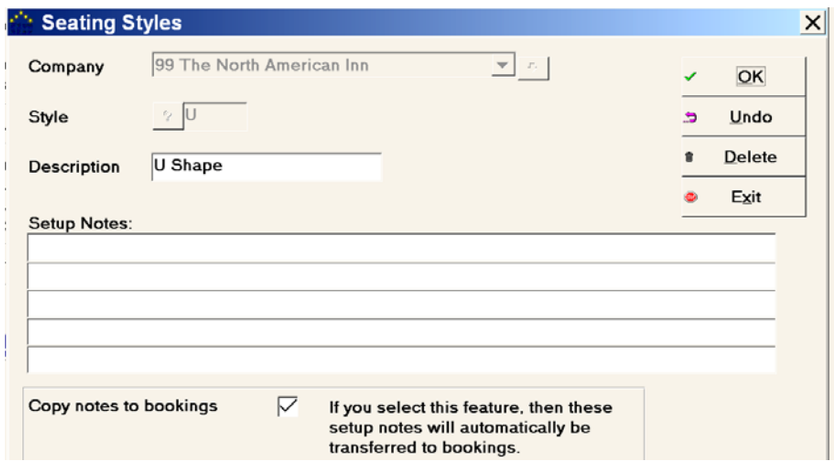


Figure: Seating Styles

These codes are used when entering room setup information for a booking and their description will be used in the Room Setups screen and will be printed on the Function Report.

Enter a meaningful code to identify a Seating Style: e.g. – Lect = Lecture Style; RounL - Round Large Tables; TS - T-Shaped, 10R=Rounds of 10.

A note may be entered on the line following the description to provide you with more information. This will appear when choosing this code in the Rooms setup.

Rooms

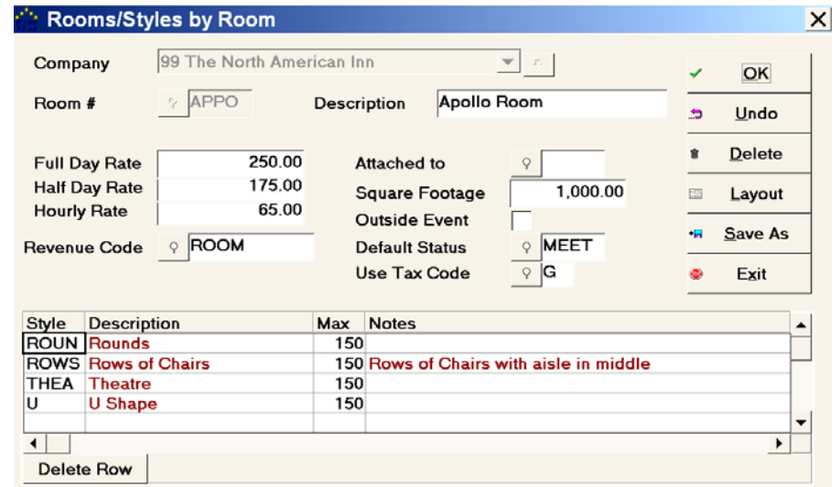


Figure: Rooms/Styles by Room

Rooms are the focal point of the Banquet Module.

Enter a Room code and description. The description will show on the graphical display when entering Booking details. Again, make them meaningful (for example, use FL for Fiji Lounge or GL for Gold Room.)

After the description, enter the rates you would charge for this Room – the Full Day Rate would be used when booking a function.

Attach the Room Revenue code, as previously set up, for this Room by entering the code or choosing from the list box. This code will direct the revenue to the appropriate Billing Code.

Is this room attached to or part of another room? For example, you may have one large room with wall dividers. This will allow for splitting of the room. When booking a function you may be able to use two small rooms that are joined into one instead of using one large room. Or you may be able to take a large room and split off part of it while keeping the other part open for another function. If any of these types of situations occur you may attach the other room code in this field or leave it blank if you do not require this feature. When conflicting checking occurs any attached rooms will also be checked.

Next you will find the Square Footage field. This is a memo field for information purposes only.

The Outside Event box is to identify whether this room is available for outside events. Press the spacebar or click with the mouse to activate the flag.

The next two optional items to set up are the Default Status and the Use Tax Code. Setting up a Default Status code in this field will prefill the Status field when setting up a booking. This will save a little time for those people who use the same status every time they enter a booking. Note that when booking the function the status code may be changed. The next field, Use Tax Code, is used to override any tax setups in the Profile screen. For instance, there may be two tax rates instead of one, or the tax rate for the room may be different than the tax rate for the equipment. If this is the case you will need to setup the tax code in the Point of Sale System Parameters program prior to attaching the code in this area. Once this has been established you may enter the code in this field. If your taxes follow the rules established in the Profile then skip this field.

Now you can attach a Seating Style code (e.g. LS-Lecture Style), to this Room and identify the maximum number allowed for this setup in this Room. The maximum

number is checked in the Booking-Rooms/Event Details screen. A warning will appear if you try to book more than the allotted number of guests.

You may attach as many codes as you need. To delete a Style code, select the row to be removed and click the Delete Row button.

Would you like to design a view of what the styles would look like in this Room?? - Select the Layout Button.

For those of you familiar with the Design Area Layout from the POS module, you will recognize this function. Choose the Seating Style for your design and you will now be able to start by adding tables. Then follow the instructions and lookups and drop the item where required.

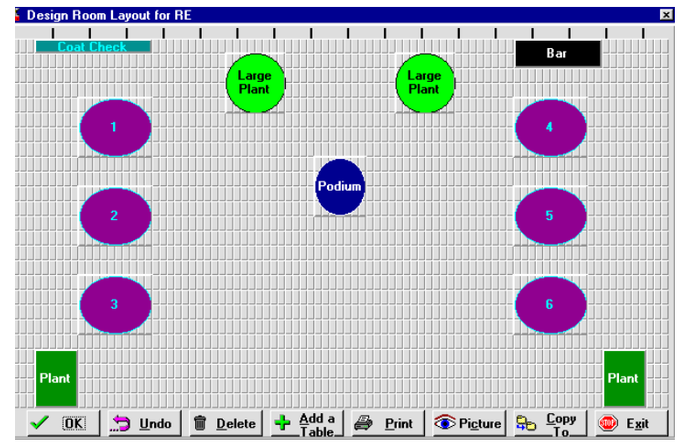


Figure: Design Room Layout for RE

To add a new table or display item, select the Add a Table button. To edit a table or display location, description, size or format selects the table/display item. Keep adding able/displays until complete.

To Delete a Room display, select the Delete button.

To attach a digital picture or bitmap of the Room to the style, choose the Picture button.
This will bring up an entry screen for you to attach the bitmap, and a description. You can view it by clicking on the "Eye" icon. In future enhancements the Print icon will allow you to print the picture.

If you do not want to design a layout at this time, exit this screen and continue entering additional Rooms and setup Styles.

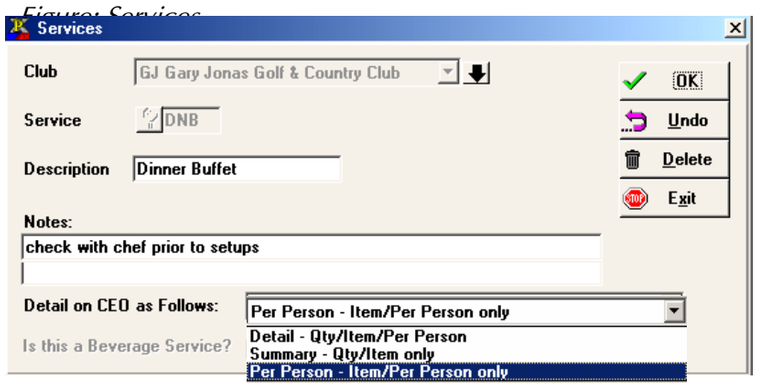
Do you have a room with roughly the same seating styles and rates? Use the Save As feature on the main room screen to copy all information to another code. This will copy all information, except the layout bitmaps, from your existing room to the new room. It also copies the room description so make sure that you change the description to identify the new room!

Did you make a mess when editing your design? If so, select the Undo button in the main layout screen and your original design will be restored.

The next item to set up is the types of Services you will require.

Choose Services from the Setup menu.

Figure: Services



Enter a meaningful code for the service required – e.g. DNB - Dinner Buffet; LS - Sit-down Lunch; HB - Host Bar.

You can add up to two lines of notes to be attached to the service.

'Detail on CEO as Follows' needs some explanation. The Catering Event Order is a document that contains all details of the event. This includes the services (i.e.-Host Bar, Buffet Dinner, Cocktail Party, etc.). You may have this service print the prices out in one of three ways:

Detail-Qty/Item/Per Person - this will print the quantities, item description and price per person

Summary - this will print the quantity and item description only

Per Person - this will print the item description and per person price

Choose the detail for the service you are setting up. Need the same service but with different levels of detail? You will then need to set up two codes to identify them.

Do you have items that you can supply for your Guest when they book a Room? (e.g. podiums, A/V equipment, etc.) or do you rent equipment from outside services and charge your Guest for it?

If you do, you can set those up next…

Resources

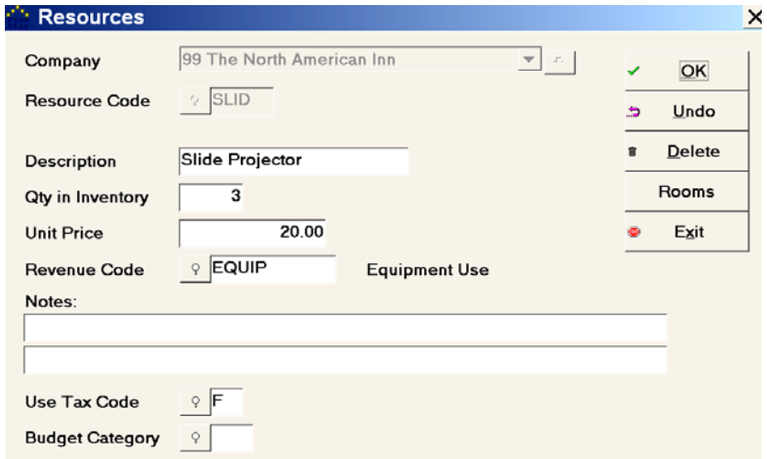


Figure: Resources

Enter a meaningful code to identify the resource/piece of equipment -e.g. PD - Podium; VCR - VCR, canopy rental, etc....

After entering the description, enter the quantity of this item you have on hand and its unit charge out rate. The quantity will be used as a basis to determine if items are available for use. If you are setting up resources without a unit price you will be able to attach a price at the time of Booking. This is useful for third party rentals.

Attach the appropriate revenue code for the resource. This code controls the placement of the revenue in the Daily Revenue Report.

You may also attach two lines of notes to this item. Again, this is for informative purposes and is only used in this screen.

There are two other optional features used for information for the resource. The Use Tax Code has the same use as it does in the Rooms program. It is used to identify an overriding tax structure for the equipment.

The other feature is the Rooms button. This will restrict the usage of the specific resource to certain rooms. Choose the room from the list and select the Include or Exclude button. To remove a room restriction click on the room in the display double click on the room, then select the Remove button.

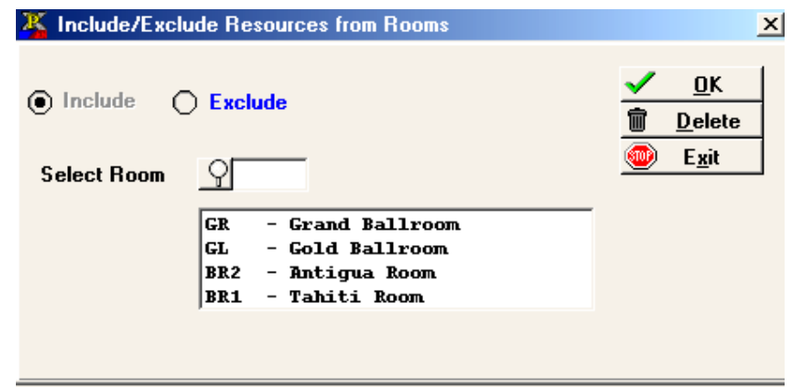


Figure: Include/Exclude Resources from Rooms

All of your codes have now been established. Feel free at any time to revisit these areas to modify, or add new information.

This next part of the System Profile controls several areas of the module through the use of codes and flags. To turn on a 'flag' click your mouse button (or press the Spacebar) to activate the 'checkmark' and the feature. Other areas require specific

codes. Prior to entering any information in this screen you should read through the next section to determine and discuss the items required.

Customizing Your System

In the Setup sub-menu, choose System Profile, then the button Page 2 from the screen.

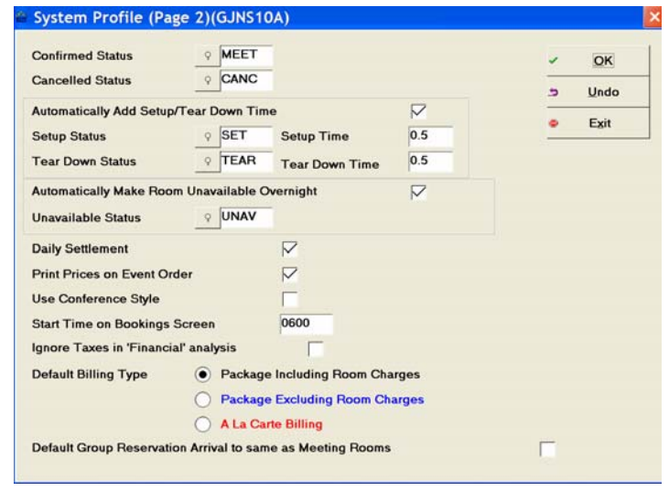


Figure: System Profile

Status Code Identification:

In the screen above you will see areas for four (4) Status Codes. Each of these codes is important for the day-to-day entry of your Bookings.

The Confirmed Status code will identify a Booking that cannot be “booked over”. A confirmed Booking takes priority over a non-confirmed (i.e. pending) if double Booking is not allowed.

A Cancelled Status code allows you to cancel a Booking, but retain all the main Booking details. This is useful reporting tool as you may print a list of cancelled Bookings for a specific period from the Reports sub-module.

The Setup and Tear Down Status codes are used with the Automatically Add Setup/Tear Down Time flag. Activation of this flag will add the allotted time to the beginning and end of a Booking in the Room/Event Details screen and the associated bar on the Booking graph. If you are not intending to use the automatic feature then you do not need to attach the status codes and related times in this area. You may enter the setup/teardown codes manually through the Events screen. Please note that if you decide to turn on this feature at a later date you will affect only subsequent Bookings. The feature is not retroactive.

Allow Double Booking - Activation of this flag will give you the ability to book more than one event in the same time period. A conflict message will arise to warn you of the overbooking. At that time you will then be given the option to continue with the Booking or to choose another Room and time. Please discuss the use of this with your trainer. The default is set to NOT allow double Bookings to occur.

Use POS Taxes for Services - Activate this flag to access the tax rules used by the POS system profile for your services (POS items). An assumption is made that the taxes relate to P,G and O codes in POS. Therefore the taxes you have set up on the initial System Profile setup screen will not be in use for the Services. See your Administrator regarding the tax rules.

If Service Chg % on Main Profile is Set to Zero use these - As stated in item #4 in the Main Profile descriptions, you have the option of charging different service charge percentages for event rooms, services and resources. If you would like to use this feature, set the service charge percentage to zero in the first profile screen, then enter the individual percentages, as required.

A couple of points should be kept in mind prior to using this feature:

There is only one General Ledger number linkage for the service charges. So even if you have different percentages they can be linked to only one account, and you may manually override the service charge amount in your Booking setup screens

Use Legal Paper for Event Order - Hotels with lengthy information for their events may find that printing the CEO (Catering Event Order) on legal size paper may eliminate the need for more than one page. If you would like to use this feature, make sure that the Five Star system is set up for a legal size printer and turn on this flag.

Put Prices on Event Order - Some Catering departments would like to have prices for Rooms, resources and services print on the CEO (Catering Event Order). If this is a requirement, activate this flag by entering 'Y', or enter 'N' to suppress price printing. To print two CEOs, one with prices and one without, enter '2'. Note that the linkage for price display in the Service code setup also controls the display of service prices.

See the discussion on that feature in the Setups section.

POS Tax Code for Description - This code is set up in the POS System Profile-Tax Screen. If you use the POS taxes for your services (see above) you have the ability to use a specific description for these taxes on your invoice. The code will NOT have any tax rates attached to it, as it is for descriptive purposes only. Again, as stated above, it assumes tax codes P,G, and O. For example, your descriptions may be Food Tax, Liquor Tax, and Other Tax. Discuss this prior to setup in the POS Profile.

Print CEO with Each Invoice - Activating this flag will give you the option to print the CEO (Catering Event Order) along with the invoice. If you do not want this, leave the flag off.

Start Time on Bookings Screen - The graphical view for all of your Bookings is contained in the Bookings Screen. It will have a default start time of 7:00 a.m.. If you would like your screen to start at a different time (i.e. your Rooms are not

available until 8:00 a.m.) then fill in this field with the required time. You should note that the time must be in 60-minute increments.

Deposits Create a Journal Entry – If you would like a journal entry made every time you post a deposit, activate this flag. This will use the General Ledger accounts established in the Hotel screen of the Profile. Leaving this flag off will record the deposit information, but it does not affect the General Ledger.

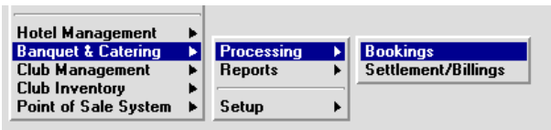
If this flag has been turned on after operating for some time in an inactive status, note that it will only affect those entries made after the flag activation. It is best decided at the time of initial setup or possibly at a specific point in time.

We have described how the different flags and codes can affect the operation of this module. If you have not already done so, enter the required information.

Using the System

Setting Up a Function

Choose Processing from the Banquet & Catering menu, then choose “Bookings”.



This will bring you to the following screen on the next page:

Booking Screen

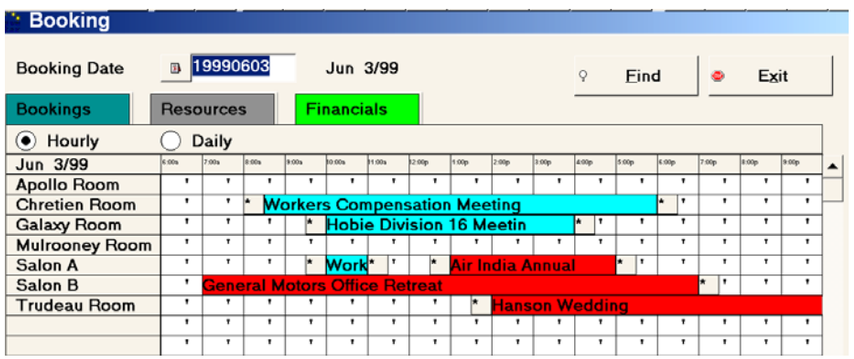


Figure: Booking

There are two ways to start a Booking, by dragging the mouse on the grid from the start time to the finish time for the room you want to book, or by clicking on the find button, and then following the instructions on the screen to either create a new booking or select an existing one. There are instructions on the bottom left of the screen to use the Mouse.

We will describe the Mouse function first.

First type the date you want to display on the screen. If the date you want to look at is the same month as the month that is already displayed on the screen you simply have to type the day you want. For example if June 3, 2001 is displayed and you want June 9, just type a 9 in the date field and press enter. The 9th will be instantly displayed. If June 3 is displayed and you want August 15th, type only the month and day and you get it. If you want a date in a different year, you will need to type the year month and day. The following paragraph describes how to do the same thing, but by using the mouse instead.

If you are a mouse person, instead of typing the date, click the icon to the left of the date field for a calendar to appear, click on the Calendar date that you want the function to start. If another member of your staff is working on the same date a warning will pop up to advise you. This is a quick reminder to warn of the possibility of booking an event for the same room and time.
Once you have the date selected and can see the existing bookings on the screen for the date chosen, point the mouse to the room and time you want the function to start. Drag the mouse from the Start Time to the End Time in the Scheduler for the room that you would like to book.

If you cannot see the End Time on the Scheduler, then before you click and drag, you need to use the horizontal scroll button to allow you to view later times. If you drag the horizontal scroll bar to see the end time but now you cannot see the start time (i.e. you are booking for a very early start and a very late end, you won't be able to do it using the mouse, and will have to use the Find button technique. Click the Find button instead and follow the steps on the screen.

To select an existing booking for editing, simply click anywhere on the booking times to display that booking and its details on screen.

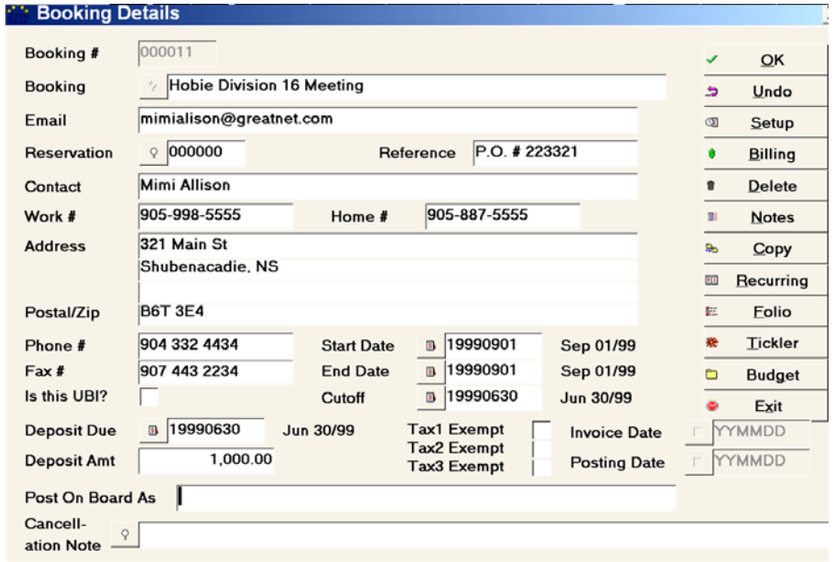


Figure: Booking Details

The information that you see here is what is required to set up the Booking details.

If you have come to this screen by dragging a new booking on to the previous screen, the software will automatically update the Booking Number. If you got here by clicking the Find button you will start in the Booking field. There you have two choices, either click the Add New Booking line at the top of the list to create a new booking, or you can select an existing booking from the list for modification.

If you choose to add a new booking, or if you dragged the mouse across a time range on the previous screen (to set up a new booking) you can fill in the fields for your booking.

Click the mouse or press Enter to "Set Up a New Booking".

Booking: Enter the description of the Booking.

Email: Enter the person's email address if you have it. This can be used to email contracts, function lists, etc.

Reservation: You can fill this field in or skip it. When a function is settled (i.e. billed) it is transferred to a front office folio. The folio becomes the invoice, and it can be edited in any way you need to after the function is settled. If you already have a folio (i.e. a reservation) created for this function you could press F2 in the field and select the folio it will be settled to. In most cases you will not already have set this up, and so you must come back to this field later, before you can settle the bill. Note: there is a handy button on the right side of the screen called Folio that you can use to create a group reservation in the front office program as you set up the function in the Banquet & Catering program. When you are finished setting up the group (bedroom and master folio) reservation you are returned to this screen.

Reference: This is a handy field for reference information such as a purchase order number.

Contact: Enter the name of the person who has booked the function.

Work & Home Phone: Next you need to enter a Telephone number for work and home, if applicable.

Address: For the Address, if it is a corporation, put the name of the corporation on the first address line. Otherwise, enter the first address line, and follow up with the rest of the address and Zip/Postal Code.

Telephone & Fax Numbers: Next, enter the Telephone number and a Fax number for the related address.

Start Date: Now you are at the Start Date -as you can see, this is already completed if you dragged the mouse over the rooms grid in the first step, as is the End date. Enter through both of them to the …

Cutoff Date: This is the date required for the receipt of confirmation. You can either type this in manually or choose the calendar input function button. The default uses the date chosen on the booking grid if you have not filled in a default number of days in the System Profile screen when you set up the program.

Deposit Due Date: Enter the date that you require the deposit to be in your hands. Again, the default uses the date chosen on the booking grid.

Deposit Required - enter the initial deposit required…this is shown on the Catering Event Order.

Tax Exempt 1, 2 and 3 can be checked ONLY if the situation exists.

Post on Board as:

Cancellation Note: If the function is later cancelled you can enter details about why here.

The buttons on the right hand side are linked to other screens...the following is an explanation:

OK - For a new booking, accepts the input and takes you to Setup
(Rooms) For existing bookings, accepts the input and takes you back to the grid

Undo - For an existing booking, will undo main detail changes

Setup - Takes you to Rooms, Services and Resources

Billing - An overall view of charges, by category, with deposits/payments

Delete - Will delete ALL Booking information (rooms, services & resources)

Notes - Additional notes for the Booking-prints with Catering Event Order
Copy - To make a copy of a Booking

Recurring - To make multiple copies of a Booking

Folio – Click when you want to set up the bedroom requirements for a group.

Tickler – Click when you want to set a reminder for yourself about this function.

Exit - Returns you to the main Booking grid.

The next item that must be performed is confirming the Room and setting up the status, etc., of the function. Choose the Setup button.

Setup Room Details

From the Booking Details screen click the Setup button on the right side of the screen to bring you to the screen that allows you to set up the details for the Room, as well as to provide further descriptive information about the function. From the Room Setup screen you can further go to the food & beverage setup and equipment (or resources) screen.

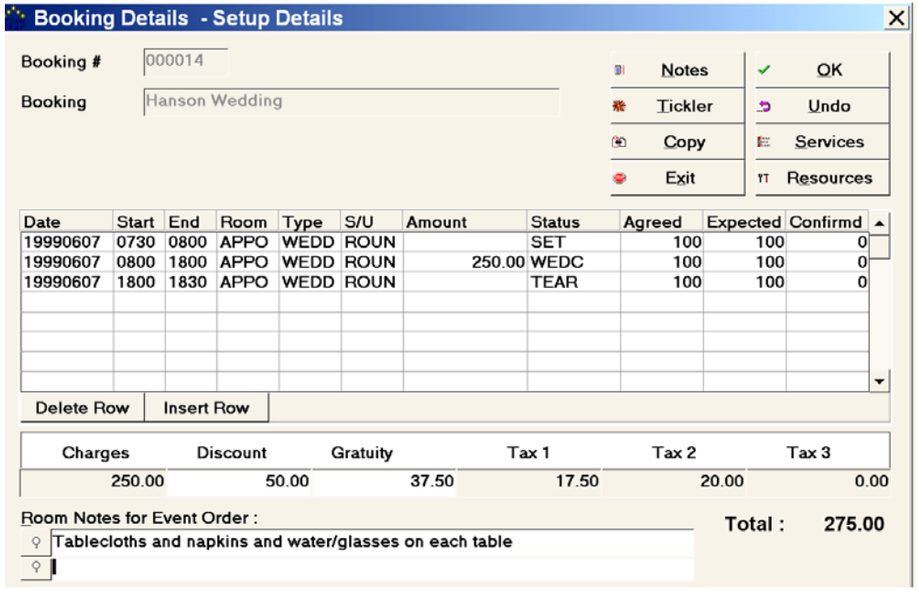


Figure: Booking Details – Setup Details

You will see that the Start Date, Start Time and End Time, as well as the Room code are already filled in. You can use the F2 lookup (by pressing the F2 key) in all fields in the screen except the date, start and end fields. Times are recorded in military format, based on 30-minute increments.

Using the screen:

Date, Start, End: These fields are normally filled in for you from the previous screen, but you can change them if you need to.

Room: If you started the booking by dragging the mouse on the room and date and time screen the room number will be filled in for you. If you started by clicking the

Find button on the first screen, and then clicking on Add a New Booking, you will have to select the function room number now. Press F2 and select from the list or type the room code.

Type, Setup : Press F2 to choose from a list of functions types.

Amount: The Amount field is used for the charge for the Room rental. This is defaulted from the daily rate in the Room setup and may be changed if you negotiate a different rate for the room. The rate you enter here is normally just the price of the room. Additional amounts for food or equipment are usually added later.

Status: Press F2 to select a status from the list.

Agreed, Expected, Confirmed: The next three fields will be printed on the Catering Event Order as well as several reports. Fill in the number of covers Agreed, Expected and Confirmed. A warning will appear if you input a number greater than the number entered in the Rooms setup. The warning will let you know that you will be exceeding the number of people recommended as a maximum for the room. This is a reminder only. It does not stop you from continuing.

You will note that the values on the bottom of the screen are cumulative, including the service charges and the taxes, giving you a total Room charge. You can override the service charge as well as enter a discount, if required.

If there are any special instructions for the Room you can list these in the Notes field. These will print along with the Room on the Catering Event Order. For lengthier notes choose the Notes button. This will give you 50 additional lines of notes for the event order and will print in the same place.

Now that you have the Room booked you can choose OK to go back to the main screen. At that point, choosing OK will confirm the minimal information required for the Booking. Or you can proceed further by selecting the Services button.

The Services button takes you to the screen that will be used to choose items for a menu or a package. These menu items and packages are created in the POS module. This linkage provides detailed pricing information.

Adding Food & Beverage Services

To get to the services setup screen as you create a new booking, from the Booking Details screen you are automatically taken to the Setup screen. On this screen (called Booking Details – Setup Details in full at the top of the screen when you are on the screen) click the Services button on the right side of the screen. You will be taken to the following screen:

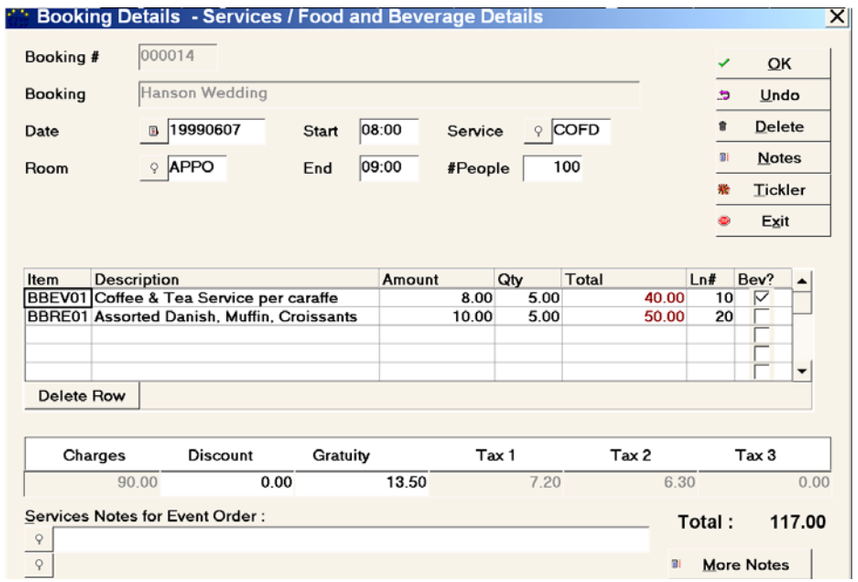


Figure: Booking Details – Services / Food and Beverage Details

Using the screen:

From the F2 lookup window that automatically appears, select “Add another service”

Date, Room, Start, End: The date and room are already filled in for you. The Start Time and End Time are filled in (military time format), but as the services are not usually at the same time as the total function, you may change the times. You will be able to use 15-minute increments for times, if desired. For the Catering Event Order, times are printed in AM/PM format, not in military time.

Service, # of People: Press F2 to select a Service. Then key in the total number of people confirmed.

Item, Description, Amount, Quantity: Press F2 to look up the actual sales item. We suggested that these items are pulled from the POS sales items file, and alternately, the POS Package menus as are their prices. Pick the items you would like by using the lookup. Key in the quantities required for each. You can change the description and the prices for each item, if required.

Total: This is calculated from the amount and quantity fields and can be changed by changing one of those two fields.

Ln #: If you leave this field blank, the Catering Event Order will be printed in the order you enter it on this screen, if there are more then one food item required. The line # field is used to sort the items differently from the sequence you enter them. Let’s say, for instance, that you enter a salad, an entrée, a dessert and coffee/tea. Enter numbers attached to each line of the grid, in increments of 10. On the Catering Event Order the item attached to the lower number prints first, followed by the next number, etc. If you wanted to add a soup, and have it print after the salad, you would enter the POS item after the last item and attach code 15 to the item. The Catering Event Order will print/display the soup on the line following the salad. This way you may control the look of your CEO.

If you would like to have a descriptive line for further detail, enter an asterisk in the column that would normally contain the item code. You may type the description, quantity is zero and price is zero. For example, if you wanted to describe the Chicken a la Francais further, you could type “with Green Beans and Rice Pilaf” and attach a sort code number that would follow the code of the chicken. These descriptive codes are great for customizing your menu on the CEO. Note that you can only use the asterisk once per service. Need another line of description? Enter *1 instead of just an asterisk – this denotes a different description. Always follow the asterisk by a distinct character for a specific description.
Again, as in the Room screen, everything totals at the bottom and you can change the discount and the service charges. You can also add notes, which will print on the Catering Event Order after the service. The Notes button on the right toolbar is “non specific” which means they apply to all the services you set up.

The Catering Event Order will print/display the service in the following order-by day, then by time, then by room.

If you would prefer to attach a predefined menu to the service instead of ‘a la carte’ items, then you should enter the POS code for the ‘menu’ you would like to choose. This item should be set up in the POS sales items list in order to attach a price to it. For instance, you would set up a code for a Wedding Menu with the related price per person. Then select ‘Choose a Menu’ from the list box. This will bring up a list of all predefined packages from the POS Package program. A package will contain all of the items associated with the menu. For example, you could have a Wedding Menu that is made up of an appetizer, a salad, an entrée with vegetables and rice, along with a dessert. When you choose the package code from the list each of these items will be automatically displayed. If the “Banquet Package Item” flag has been activated the price for the set menu will be pulled into the services screen. And, of course, you may add additional items for further description such as ‘allow 10 minutes between entrée and dessert’.

Select OK when you have finished entering all of the services and related notes.

Equipment (Resources)

To get to the Resources Setup Screen as you create a new booking, from the Booking Details screen you are automatically taken to the Setup screen. On this screen (called Booking Details – Setup Details in full at the top of the screen when you are on the screen) click the Resources button on the right side of the screen. You will be taken to the following screen:

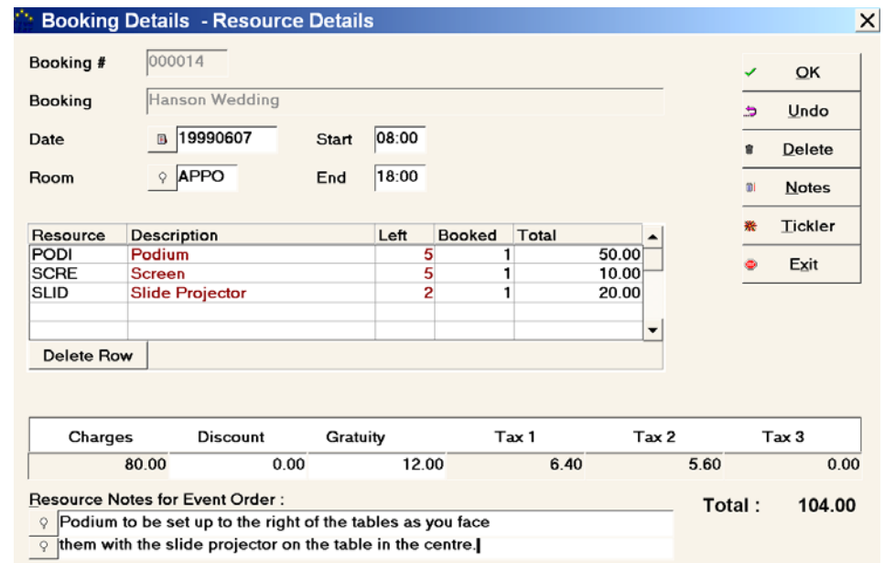


Figure: Booking Details – Resource Details

Using the screen:

Date, Room, Start, End: Enter this information if different from the original and select the Lookup to choose the resource. The program will display what you have left in stock for that day. Enter the quantity of the item required and it will compute and display the total. You may override the total price, if desired.

Notes may be added, which will print /display along with the resources.

Select OK when complete. Go back to the Main Details screen and choose OK. This has now booked your event and your screen should now show the graphed booking.

Further Information on the Booking Chart Screen

As you can see, the first screen is a chart of dates and times for Bookings. The alternately colored area beside the start/end times is the automatic time for setup/teardown. If you do not wish to have that time allotted for this Booking or if you want to increase or decrease these times you will need to edit the setup details for the Booking.

To edit any of the details of this or any such Booking, either select the graphed item or select the Find button to choose the Booking to edit. Clicking on a Booking displays the details of the Booking. Clicking on the Find button will display a list of all 'open' Bookings. An open Booking is described as one that has not been updated (posted) to a front desk folio.

Alternately, if you would like to view a list of all 'closed' Bookings, select the blue circular arrow button on the toolbar to the right of the list. This will bring up the list of all Bookings that have been updated. Select the circular button again and the open Booking list will be displayed.

To cancel a Booking but retain the main details select the Setup button. You will be in the Room/Event Details screen. Change the status code to your Cancelled code. Choose OK when complete to bring you back to the main screen, then choose OK again. This will open up that Room for Bookings, but retain the information for reporting purposes.

Now that you are back in the Booking again, you can select the Billing button to review the total dollar value of the item booked. You can also select the Notes button to add “free form” notes to the Booking with word wrap capabilities. These notes will be printed on a separate page following the CEO. If you have entered notes for the Booking you will see a prompt to the left of the “Setup” button as follows: *Notes on File*

The difference in booking any event using the Find button, is that you must enter Start Dates, End Dates, Start Times and End Times and Room codes manually. The system will use the data entered to graph the function. Further information required in all other screens would follow the same format. If you choose a Room that has already been booked you will be warned with a ‘Conflict’ message. And if you are setup to allow ‘Double Booking’ then the override exists.

Copying Functions to Save Time

You can also COPY from any of the existing bookings. If you have bookings that repeat frequently or even from time to time, we suggest that you set up a ‘template booking’ and copy from the template at this point in the program.

To set up a template booking, create a booking for a long time in the future (e.g. 10 years ahead). In the booking field make the name *IBM Meetings, i.e. put an * at the beginning of the name so all templates appear at the top of the list and so that they are clearly distinguished from real functions. You can fill in any screen of detail including rooms, food & beverage, equipment, and notes, and all will be copied from the template booking.

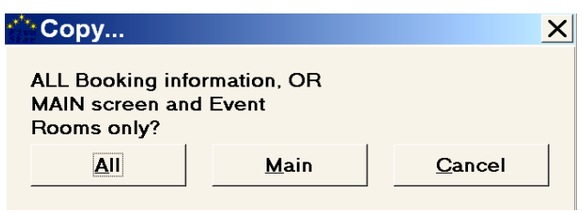
This is a real time saver for groups that come more than once. When you want to duplicate the booking, start by clicking Find on the previous screen. Then search for the template by speed searching in the Booking field by typing (e.g.) *IBM. When the IBM template is on the screen click the Copy button on the right side of the screen and follow the steps to duplicate the template to become an actual new booking.

You can also turn any booking or template into a recurring one using the Recurring button on the right side of the screen. This feature is for groups that come back, but on a regular basis, such as weekly, daily, monthly etc.

Note: There is a quick copy feature for multi day bookings. When you have a function that runs more than one day and the subsequent days are the same or similar to the first day, you can set up the first day, including room assignment, food & beverage, and equipment, and then use the Copy button on the Room Setup screen. You can copy all of the above or just the room assignments. This feature adds days to a single booking so that when it is billed it creates one invoice.
To copy a function which will create a new function on a different date use the Copy button or the Recurring button on the Booking Details screen (the first screen). The Copy button allows you to make a single copy while the Recurring button allows for multiple copies that recur periodically, like the Rotary club coming every other Friday.

To make a single copy of an existing Booking, go into a Booking by clicking on the grid or by choosing the Find button and pick from the list.

Select the Copy button and the system will ask the question….



If you choose All, the system will prompt for a date and copy over all Room/Event Details Setup, Services and Resources details.

If you choose Main, only the Main Booking details will be copied.

If you choose a date that has an overlap due to an existing Booking, the program will warn you of the conflict and ask if you want to continue. Saying Yes will set up the Booking and advise you of a conflict on the To Do List. It is up to you at this point to deal with the conflict. If you select No, the copy will not occur. If more than one Booking exists in any time slot on the graph, clicking on that time will produce a pop-up window, allowing you to choose from the Bookings on file. To make multiple copies of an existing Booking, go into a Booking by clicking on the grid or by choosing the Find button and pick from the list. Then choose the Recurring button. You will be presented with the following screen.

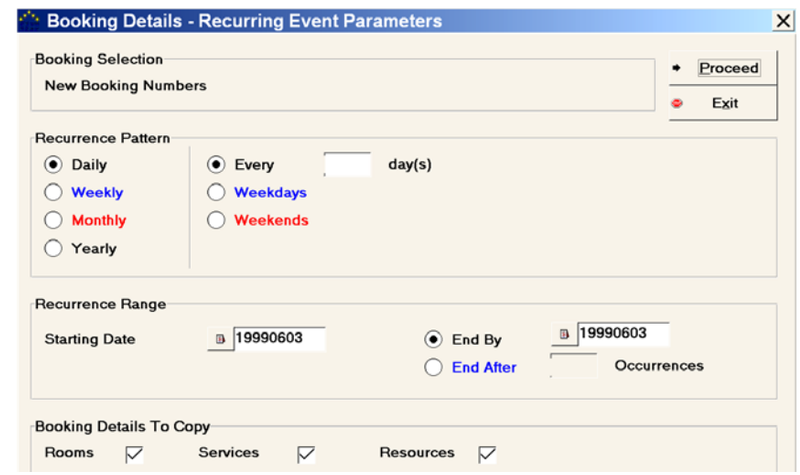


Figure: Booking Details – Recurring Event Parameters

This feature will save you a considerable amount of time. For example, let's say you have a Board of Directors meeting that occurs on the 2nd Friday of every month. The client has advised you that they would like to book the specific Room for a year in advance. If you used the 'Copy' function you would have to perform the exercise 12 times and would have to look up and enter the specific dates for each monthly occurrence, one at a time.

Using the Recurring function choose the radio button for the associated Recurrence Pattern (Daily, Weekly, Monthly, Yearly). In the example above we have chosen monthly.

Next you need to identify the details. You choose the specific day by choosing the 'Day' radio button and entering in the specific date. e.g. 23rd and then choose the monthly pattern.

Overall View of Information

The Banquet module has some helpful features added to the main Booking screen:

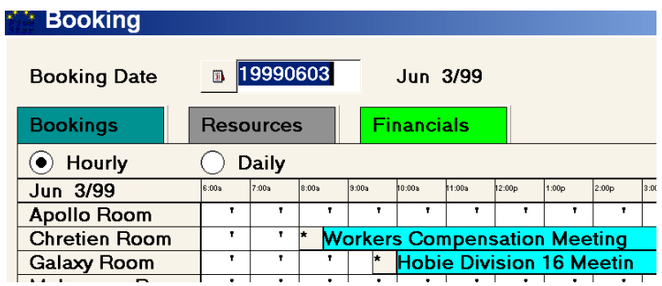


Figure: Booking

There are three Tab keys located above the grid.

Clicking on the Resources Tab will give you an up-to-date list of the Resource situation for the active date. Again, clicking on the Resources Tab will return you to the graph. The Financials Tab will give you a daily record of your Booking funds. Clicking on it again will give you a monthly summary.

Clicking on the Bookings Tab will redisplay your function details.

Clicking on the Daily Radio button will show a daily graph and clicking back on the Hourly Radio button will return you to the Hourly graph.

Reminder System

A feature that has been added for your convenience is a “Tickler List”. This list is a small notepad for items that you need to do.

To use this form any booking screen click the Tickler button, and select **Add an item to this list**. The following screen will be displayed…

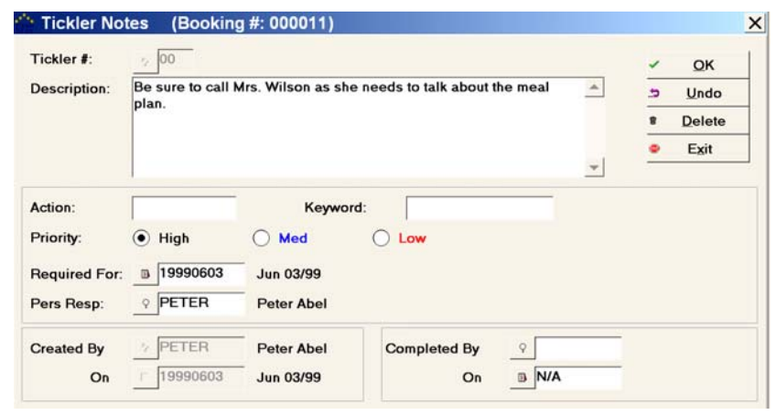


Figure: Tickler notes

Enter the date, priority, and comment on what has to be done.

To remove an item from the To Do List, choose the item, then check the Completed box.

This will remove the item from the list. This list displays in chronological order, from oldest to newest. You can review the reminders while working in the function on each screen of the booking process, or you can print lists of reminders from the Tickler List program on the Processing menu.

Reports and Client Documents

The following screen displays a set of documents and reports available to you:

Report Generator is a user defined report creator with data choices from the Booking-Details screen. It lets you make simple reports with information you choose.

The next item on the list is a report that sets up a Merge file. This is used to put information from the Five Star Banquet program into your existing Word 97, or Word 2000 contract. We distinguish two types of documents commonly provided to function clients as either a 'contract' or a 'catering event order' (also commonly called a function sheet. The contract typically has simple information from Five Star like the client name, address, date, room; as well as the terms and conditions you provide the room and services for. The catering event order is a more detailed document which shows the client information, date, etc., plus it shows room, setup details, equipment requirements, food & beverage requirements, times and special notes. You may use one or the other or both.

Print Event Order creates the CEO (Catering Event Order).

The balance of the items are reports available for both viewing and printing. Let's go through each of them.

Report Generator – Booking Screen

This program gives you the ability to print a master report of all information from the Booking-Details screen. You may also 'Design Your Own Report'. This is the same Five Star F9 facility available in all modules. After entering your Hotel code you will see the following screen:

A Master Listing prints all details for every Booking on file and can be viewed on the screen or printed to a Lotus/Excel file or setup as a Merge document.

To get a more concise listing choose the "Design Your Own Report".

You will then be given a list of items to choose from:

Follow the instructions on the screen-Click item to add it to the report-Double-click item to remove it. Choosing the Condition button will allow you to further filter the report. Sort By allows you to sort by a different item. You can save the report for later use prior to printing by choosing the Store & Print button, or alternately you may just Print. The number of characters used is shown at the bottom right of the screen.

Merge Event Information:

This menu item will allow you to extract certain data fields from the Booking details and set them up as a "merge file" for a mail merge into your contract form.

In your contract document you can pick and choose from the 17 data elements to include in your contract.

Prior to running this program you should have a standard template set up in your word processing program for the contract form you require.

Choose "Print Contracts" from the Report Menu. The screen will ask for your Hotel code and then ask you to choose the Booking number. Select the Proceed button

and the Printer Selection Menu will pop up. From that menu choose the Word-M Merge Format.
This will create a merge file for you. You will get a message window telling you what it has called the file and in which directory it was saved.

Then it is easy to merge those document fields into your own designed Contract.

Five Star Hotel
235 Yorkland Blvd.,
Detroit, Michigan 48207

(313) 259-6226 Fax (313) 259-6227

Nov. 1, 2000

Wilf Hinderle
125 Mural Streeet
Richmond Hill, Michigan 49720

Dear Wilf:

It was certainly a pleasure speaking to you regarding the arrangements you recently made with Five Star Golf and Country Hotel.

Upon receipt of this signed contract and acceptance and receipt of the full deposit, Five Star Golf and Country Hotel(herein after referred to as the Hotel) guarantees the availability of function rooms & services booked by Hinderle Wedding (herein after referred to as the Group) as outlined in the Catering Contract.

If displays or exhibits are to be used, they must be professional in nature, arrangements for their arrival, unloading, storage, loading and departure must first be made with the Hotel. Products on display are the responsibility of the Group. Space for the events is booked only for the times indicated.

The Group agrees that the Hotel may at its sole discretion cancel this by giving the Group oral or written notice of its decision and shall as soon as reasonably possible thereafter return to the Group any deposit paid to it and there shall be no further liability upon it.

The Hotel shall not be liable or responsible in any manner whatsoever for any damages sustained by any party to the Contract caused by any person, firm or corporation and the Group agrees and undertakes to indemnify The Hotel against any and all claims and expenses presented by any person, firm or corporation for any loss or damages resulting from:

This establishment being unable to perform the services set out in the attached Catering Contract as a result of any strike, flood, fire, force majeure or Act of God.

The Conduct of any person or persons attending the function. The Conduct of the designated Group leader, or the management of the function.

We reserve the right to inspect and control all private functions. Liability for damages to the premises will be charged accordingly. The Group is held responsible for any damage to the premises by their guests or independent contractors on their behalf.

If sleeping rooms are required, a detailed rooming list must be received no later than 7 days prior to the function.

Any sleeping rooms booked by the Group on a tentative basis shall be held only to the extent that they are not required by other functions. Should the space be needed the Group will immediately be given written notice, within limited but reasonable time in which to confirm the additional space in writing.

A deposit of $ 500.00 is due upon signing. A further 50% of Total Charges on Catering Contract, excluding taxes & service charges, is due at least 60 days prior to the scheduled dates of arrival. Final payment will be invoiced up to 10 days following end of the function. Invoices, once rendered, are due and payable upon receipt.

All outstanding accounts over 30 days are subject to 2% interest per month.

*X*_____
*X*_____

Authorized Signature	*Authorized Signature*
Wilf Hinderle	*Five Star Golf and Country Hotel*

_____
_____

Date	*Date*

Print Event Order

Otherwise known as the Catering Event Order, this form will provide a printed copy of details to the Member/client.

Enter your Hotel code and the number of the Booking requested.

The Printer selection menu will be displayed. A copy follows this page.

The Event Order prints most of the details of the Booking including prices, if requested. A copy of the notes will be printed along with it on a separate sheet.

CEO #: 000055
Page: 1
Created: Nov 15/00

Catering Event Order

Account:	Z0099	Contact:	Wilf
Post as:	Banquet & Catering-Direct Bill	Work #:	905-886-0544
CEO Name:	Hinderle Wedding	Home #:	905-886-0999
Address:	125 Mural Streeet	Start Date: Nov 15/00	End Date: Nov 15/00
	Richmond Hill	Phone:	905-886-0544
	Michigan 49720	Fax:	616-547-9802
Deposit Required:	500.00	Booked By:	James Young
Payment Method:	Direct Bill	Room # :	
Sponsor:	L Belinsky	Chit # :	

Date	Time	Room	Price	Function	Agreed	Expected	Confirmed
Nov 15/00	2:00p - 10:00p	Grand Ballroom	2000.00	Wedding	100	100	100

Date	Resources (Room)	Price	Setup
Nov 15/00	10 Linen Service (GR)	1000.00	linens-pink service.table & napkins-napkins with
	1 PA System (GR)	150.00	lace trim
	1 Podium (GR)	50.00	

Menu

Nov15 @ 6:00p in Grand Ballroom

Dinner-Sitdown

40 Chateauneuf-du-Pape	*1920.00*
200 Caesar Salad with Garlic Croutons	*950.00*
200 Chicken Ala Francaise	*5200.00*
200 Apple Pie	*800.00*
70 Tea	*122.50*
200 Coffee	*350.00*

Organization Authorized Signature — Date

Sales Co-Ordinator — Date

Remaining Deposit Due: 0.00 — Deposit Due Date: Nov 01/00

Beverages, Bar, Wine **10% Liquor Tax will be added to All Alcoholic Beverages
Cancellation accepted only in writing 30 days prior to scheduled event.

The next report to run is the Events Calendar. This report is for a specific date range, whether it is for a day, a week, a month or other period. This will display/print a report for all status types or a specific data type. After entering your Hotel code choose your dates and the status code, or press the enter key for all status codes. Then choose whether you would like to view this on the screen or print to a printer or file.

The output will sort by date and provide date, function name and type, location, start time, guaranteed number and booking number.

Scheduling Report. This will identify all services and equipment for all the Bookings scheduled within the date range specified.

The report will print the date, start time, Room code, Booking description, details of the services/equipment and quantities required. This can be viewed or printed.

The other related report is the Function sheet. This will print individual sheets for the Rooms, services and equipment, which can then be distributed to the appropriate departments. This can also be viewed or printed.

The Due Date Report and the Cut Off Date Report print all existing Bookings with either the due date for the deposit or the cut off date for contract receipt. You also have the option to condition the report to pick up or not pick up fully paid Bookings. Both of these reports have a View and a Print option.

Another report is an Events Booking Report. This will display a graphical summary of all Bookings by month, with the options to go back and forth by month, as well as to print. The Booking is illustrated with a bar graph. You also have a Page Down and Page Up button for more than a full screen of Bookings.

A Deposits Report prints a list of deposits for a specific period. Depending on the method that you choose for the recording of deposits, this may print all deposits/payments or only the ‘unapplied’ deposits.

The Financial report pulls off a report designed to show the revenues(rooms, services, resources), service charges, discounts and taxes, summarized for each booking. This may be for a specific or all status types, and may show posted bookings only.

Settlements/Billings

Use the Settlements/Billings program on the Processing Menu to create an invoice and post it to a folio at the front desk. To do this you must be sure you have a reservation number entered in the Reservation Number field in the Main Booking screen. When you do the settlement it will post to the folio for the reservation chosen. After it is billed to the front desk you can make any changes to the folio you need to, like extra charges and adjustments. From there the folio is dealt with just like any other front desk folio. Please ensure that you have updated any items in Rooms/Services/Resources for the Booking that requires changes, prior to printing your invoice.

Choose Settlement/Billings from the Processing Menu.

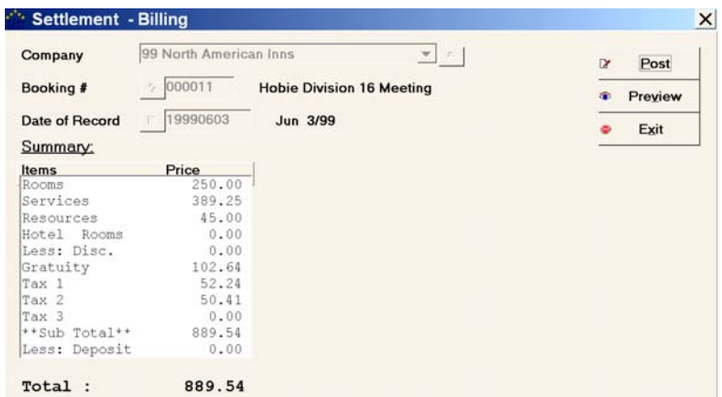


Figure: Settlement - Billing

Using the screen:

Enter the Booking number you want to update. This must be filled in and usually you will see a summary of all of the charges you have set up in the Bookings screen.

Choose the Post button. An invoice may be printed as many times as required prior to posting the Booking by choosing the Preview button. If you activated the flag to have the CEO print along with the invoice you will be shown another printer menu in order that you may choose the printer for the CEO.

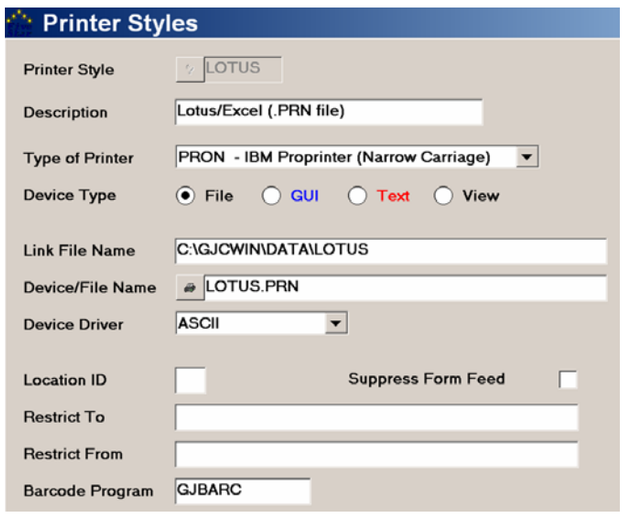
You still have the ability to make notes on this booking or use the Copy or Recurring functions within the Bookings screen. However, you now cannot change any of the booking details.

Banquet & Catering Contract Merge

Five Star can send details from your banquets & meetings to Microsoft Word so the details of the meeting is merged with your contracts. Thus the work you have done to create your carefully worded and formatted contracts is utilized by the Five Star Banquet & Catering system. Here's how you do it.

In Five Star:

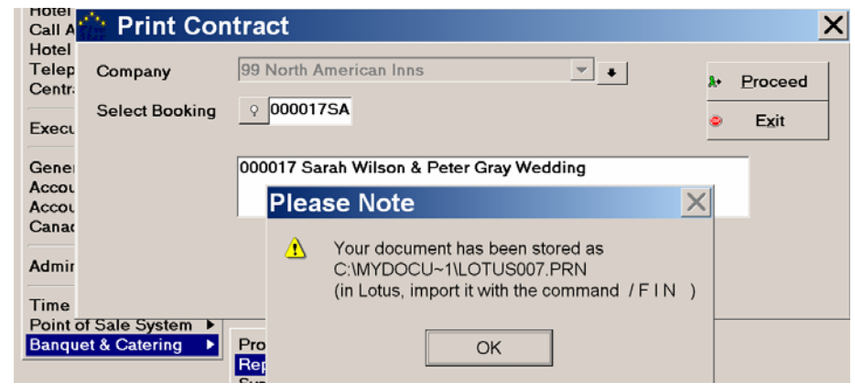
1) Make sure you have a printer set up called Lotus. You likely do, as Five Star comes pre-shipped with this printer. Check the Printer Setup screen on the Admin menu. The screen should look like this:



You can put your terminal number (like T0, T1 or T2 etc.) in the Restrict To field so other users don't have to select this printer when they print. Your terminal number is displayed on the Five Star screen at the bottom to the right of the date.

2) Now make sure Five Star knows where to put the file it will create that Word will use to do the merge. This file will contain all the details of your function or meeting from the Five Star Banquet & Catering program. To do this go to the Workstation Setup program and select your terminal number. Fill in the Lotus Directory field with C:\MYDOCU~1 and save the screen. This is how Five Star recognizes the My Documents directory on your own hard drive. The ~ symbol (called a Tilde) is found by pressing the shift key and the key to the left of the number 1 key up on the left end of your keyboard. If you want the file to be saved in a different directory you can enter it instead, but this is likely the one you want. Microsoft Word uses this directory by default.

3) To send the details of a function to do a merge to one of your contracts, select the Merge Event Information program on the Reports menu of the Banquet & Catering program. Simply select the function you want to print and the in the print window select the Lotus printer. Take note of the name and directory of the file Five Star creates. You will use it for the merge. It will look like this:



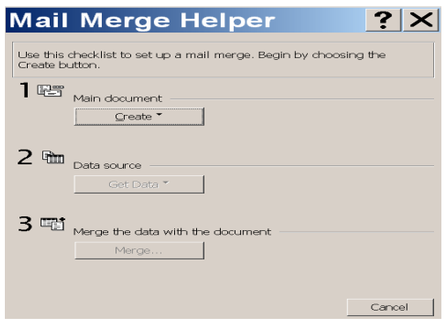
Now you are done with the Five Star part. A file was created which includes all the information from the first booking screen with the name and address, email, dates, etc, and all the information from the billing screen with room numbers, services, resources, and dollar amounts. You can select any or all of these fields for merging with your contract as explained in the next steps.

In Microsoft Word:

Go to Microsoft Word and open up your contract file. These instructions are based on Word version 2000, but other versions are handled similarly. The first step turns it into a 'Mail Merge Primary file'. That is, it will have 'merge fields' added to it that will automatically put the data from Five Star into the contract. You need to add these merge fields only once. After you do, the merge takes a second or two.

To add merge field to your document:

1) With the contract document open on the screen click on Tools and then on Mail Merge. You will see this screen:



Click on Create, and then on Form Letters and then on Active Window. This makes your contract the 'mail merge primary file'. Next click on Get Data, then on Open Data Source, then type *.prn in the File Name field and also select Text files (.txt) in the files of type field. This should cause the file you wrote down from Five Star to appear in the file list. If you are in the wrong directory you may need to select a different one. Now click on the name of the file you just wrote down from Five Star like Lotus0006.prn. This makes it the '«Book»mail merge secondary file'.

2) The mail merge won't quite work yet since you must tell Word where to insert the fields from the Five Star file. You do this once, and then the fields are remembered thereafter. This takes a little while to do now, but saves lots of time when done. Click your mouse into your contract at the position where the first piece of information from Five Star will go. This might be the guests name or perhaps the reservation number etc. When you have the cursor flashing at the right place in the document click on the button at the top left of the screen called Insert Merge Field. You will see titles for all the fields of information that Five Star has created for the merge. Click on the title that you want inserted in this point. You will see a

funny line like <<Guest Name>> put into your document at that point. Don't worry if it changes alignment, that can be corrected later. Continue through all the fields you want to be inserted into the document.

3) Save the contract under a new name. This becomes the completed 'mail merge primary file' ready for use in an instant.To actually do the merge click on the merge button further to the right at the top of your screen. The window will suggest you merge to a New Document, which you should. That leaves the mail merge primary file unchanged so you can use it over and over again. Click on the Merge button on this screen and instantly you have a contract with all the information from Five Star in it. You should save this as a file with the name of the customer for future reference.