# Table of Contents

- Checking In – Registering Entry .................................................................................................................. 3
- Checking in a Guest with an Existing Reservation Paying by Credit Card ..................................................... 3
- Checking in a Guest with an Existing Reservation Paying by Direct Bill ....................................................... 3
- Checking in a Guest with an Existing Reservation Paying by Cash ............................................................ 4
- Checking in a Guest without a Reservation / Walk-In .................................................................................... 4
- Checking in a Share with Reservation ........................................................................................................ 5
- Adding an Other Name to a Reservation for Registration Purposes ............................................................ 6
- Modifying the Tax Exemption Status .......................................................................................................... 6
- Modifying the Rate for a Stay with Different Rates on Different Days ....................................................... 7
- Modifying the Rate for a Stay with the Same Rate on All Days .................................................................. 7
- Check-In a Reservation with a Canceled Status .......................................................................................... 8
- Viewing the Reservation Change Log ......................................................................................................... 8
- Making a Room Change of the Same Room Type after Check-In .............................................................. 9
- Making a Room Change to another Room Type after Check-In ................................................................. 9
- Day Use Check-In with a Reservation ........................................................................................................ 10
- Day Use Check-In without a Reservation .................................................................................................. 10
- Check-In a Reservation with a No Show Status ........................................................................................ 11
- Check-In a Reservation with a Canceled Status .......................................................................................... 12
- Check-In a Reservation Arriving Early ....................................................................................................... 13
- Dividing Postings before Check-In on a Reservation ................................................................................. 13
- Group Check-In .......................................................................................................................................... 14
- Creating a House Account ......................................................................................................................... 15
Checking In – Registering Entry

The Checking In portion of the application allows checking guests into the hotel with an existing reservation, without a reservation (walk-in guest), and to create a House Account for postings not associated to a guest room.

Checking in a Guest with an Existing Reservation Paying by Credit Card

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, click on the Check-In button in the Actions box on the ribbon bar.

5. The next screen will be the Room Availability selection screen. Select an appropriate room from the list displayed by clicking on it then click OK.

6. The next screen is the Form of Payment screen; the guest’s credit card will already be entered in the CC Account # field for the method of payment, click on OK to accept this form of payment.

7. You will receive a pop up message that the reservation has been Checked-In Successfully.

Checking in a Guest with an Existing Reservation Paying by Direct Bill

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, click on the Check-In button in the Actions box on the ribbon bar.

5. The next screen will be the Room Availability selection screen. Select an appropriate room from the list displayed by clicking on it then click OK.

6. The next screen is the Form of Payment screen; the Direct Bill form of payment will be selected. It will also list which Direct Bill Account it will be billed to, click on OK to accept this form of payment. Note: If you need to search for the Direct Bill Account, click on the ellipsis button; enter information into the Account Name or
Account Number Fields and Click Search. And select the correct account, Click OK. Back at the Form of Payment option, click OK. You will receive a pop up message that the reservation has been Checked-In Successfully.

Checking in a Guest with an Existing Reservation Paying by Cash

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, click on the Check-In button in the Actions box on the ribbon bar.

5. The next screen will be the Room Availability selection screen. Select an appropriate room from the list displayed by clicking on it then click OK.

6. The next screen is the Form of Payment screen; select the department code for cash payments. Complete any required fields such as Voucher or Reference. The amount to collect is entered for you already. Note: You can change the dollar amount to collect if needed. Click OK and you are taken to the folio to complete the posting. Note: This total is the Room times Tax times the number of days staying. No Incidentals are calculated as part of this.

7. In the folio option, complete any required fields such as Voucher or Reference, then click Save. Note: You can change the dollar amount to collect if needed. You will receive a pop up message that the reservation has been Checked-In Successfully.

Checking in a Guest without a Reservation / Walk-In

1. If you are walking in a guest, click on the Walk In button.

2. Fill in the information as you would for a regular reservation. Note: Make sure the Arrival Date is the current business date.

3. Unlike a regular Reservation, you will not have an option to enter a Payment Type on the main screen – that will appear later on in the Walk In process.

4. The first pop-up box you may see, once you click on the Save button, may relate to the status of the room that you chose. If the Room Status is DIRTY. Continue check-in? Click Yes or No. If you answer No, you will be returned to the Room Availability/Features screen. Should you Cancel out of that screen, a regular reservation will be created and you will have to retrieve the reservation and check it in.

5. Should you find a clean room and change the room number, you will then get a Form of Payment pop-up box. Choosing a Credit Card type will allow you to swipe the card or manually enter in the credit card information.
Choosing Direct Bill will require you to choose an active account. Choosing Cash allows you to enter a Voucher, Reference, change the Amount, or choose a different Folio, to post the cash to.

6. The next pop-up box, will display a Checked-in successfully message, followed by a Confirmation #.

7. The final pop-up will ask you if you want to print a Registration Card.

Checking in a Share with Reservation

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, click on the Check-In button in the Actions box on the ribbon bar.

5. The next screen will be the Room Availability selection screen. Select an appropriate room from the list displayed by clicking on it then click OK.

6. The next screen is the Form of Payment screen, the guests method of payment will already be entered, click on OK to accept the form of payment.

7. You will receive a pop up message that the reservation has been Checked-In Successfully. This completed the check-in for the first guest.

8. If the other guest is also checking in, then from guest one’s reservation below the Actions box you need to select the tab for the 2nd guests name, then click on the Check-In button in the Actions box on the ribbon bar.

9. The system will bypass the room selection screen as it was selected on the first guest in the room.

10. The next screen will be the Form of Payment screen, the guests method of payment will already be entered, click on OK to accept the form of payment.

11. You will receive a pop up message that the reservation has been Checked-In Successfully. This completed the check-in for the second guest.
Adding an Other Name to a Reservation for Registration Purposes

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. **Note:** There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. **Note:** All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Under the Other Names section, enter the additional Guest Last and First name. In the Ribbon Bar click on the Save & Close button and your reservation changes are complete. **Note:** You will see a pop up box that states that the reservation has been successfully saved and you will see the confirmation number.

Modifying the Tax Exemption Status

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. **Note:** There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. **Note:** All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, on the Ribbon Bar in the Show section, click on Rates & Taxes.

5. To exempt the guest from one or all taxes; Under the Tax Exempt Setup area, check the box for which tax(s) the guest will be exempt from. When done click on Save on the Ribbon Bar in the Actions Section. You will receive a pop up message that the reservation changes have been Saved Successfully.

6. **To see what taxes are exempt or the rate without taxes** go back to the Rates & Taxes in the Show section and review the Tax Exempt Setup Area or the Rate Summary field on the right for a charge breakdown.
Modifying the Rate for a Stay with Different Rates on Different Days

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, on the Ribbon Bar in the Show section, click on Rates & Taxes.

5. Under the Daily Rate Information you can change each of the dates individually to the new rates. This will setup each day to have their own unique dollar amount to be charged each night. OR after changing the first date you can click on the button to Copy Rate to All Dates. This will copy to all dates your override rate.

6. When done click on Save on the Ribbon Bar in the Actions Section. Note: You will see a pop up box that states that the reservation has been successfully saved and you will see the confirmation number.

Modifying the Rate for a Stay with the Same Rate on All Days

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, click in the Rate field and edit as needed. To display the new rate click on the Recalculate button.

5. When done click on Save on the Ribbon Bar in the Actions Section. Note: You will see a pop up box that states that the reservation has been successfully saved and you will see the confirmation number.
Check-In a Reservation with a Canceled Status

1. From the Reservations Module, select Reservation under Find.

2. Search for the cancelled reservation. Under the Res Status column, choose Cancelled, from the drop down arrow. Enter either the Confirmation#, Last Name, Arrival Date and click on the Search button. Note: All the fields do not have to be filled out in order to search for the guest record. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the appropriate reservation.

4. In the Ribbon Bar click on the Copy Reservation button. Make any necessary changes.

5. When done click on Save on the Ribbon Bar in the Actions Section. Note: You will see a pop up box that states that the reservation has been successfully saved and you will see the confirmation number.

6. Once the Reservation is saved, then from the Reservation screen, click on the Check-In button in the Actions box on the ribbon bar.

7. The next screen will be the Room Availability selection screen. Select an appropriate room from the list displayed by clicking on it then click OK.

8. The next screen is the Form of Payment screen, the guest’s method of payment will already be entered, click on OK to accept the form of payment.

9. You will receive a pop up message that the reservation has been Checked-In Successfully.

Viewing the Reservation Change Log

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, in the Show section, click on the Change Log.

5. You will now see a Reservation Change Log window. This will list most recent changes at the bottom of the log. To see the details of a change click on it inside the log and the details will be displayed in the right window.

6. When done click on Save on the Ribbon Bar in the Actions Section. Note: You will see a pop up box that states that the reservation has been successfully saved and you will see the confirmation number.
Making a Room Change of the Same Room Type after Check-In

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, click on the ellipsis button beside the room number. Reselect a different room number from the Room Availability selections on the left side. Click OK.

5. When done click on Save on the Ribbon Bar in the Actions Section. Note: You will see a pop up box that states that the reservation has been successfully saved and you will see the confirmation number.

Making a Room Change to another Room Type after Check-In

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, click on the ellipsis button beside the room type. Select a different room type by double clicking on it or highlighting and clicking OK.

5. You will be prompted to change the rate or keep the existing rate. Select Yes to change the rate. Or No to keep the original rate.

6. Click on the ellipsis button to the right of the Room Type. Reselect a new room number from the Room Availability selections on the left side. Click OK.

7. When done click on Save on the Ribbon Bar in the Actions Section. Note: You will see a pop up box that states that the reservation has been successfully saved and you will see the confirmation number.
Day Use Check-In with a Reservation

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. **Note:** There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. **Note:** All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

Day Use Check-In without a Reservation

At this time there is not a way to check-in a guest in to the hotel without making a reservation first. **Note:** To make a ‘Day Use’ reservation, follow the same steps as a regular reservation, except at the ‘Nights’ field, it must be ‘Zero’ (0). This then makes the Arrival and Departure date the same. This is what makes the booking a “day use” stay. **All the fields must be filled in just like a regular reservation.**

1. Once the Reservation is saved, then from the Reservation screen, click on the Check-In button in the Actions box on the ribbon bar.

2. The next screen will be the Room Availability selection screen. Select an appropriate room from the list displayed by clicking on it then click OK.

3. The next screen is the Form of Payment screen, the guests method of payment will already be entered, click on OK to accept the form of payment.

4. You will receive a pop up message that the reservation has been Checked-In Successfully.
Check-In a Reservation with a No Show Status

Currently you cannot check-in a Reservation with a Status of No-Show. You must first re-book the reservation. The simplest way is to copy the No-Show reservation first, then check-in as normal.

1. From the Reservations Module, select Reservation under Find.

2. Search for the reservation to be modified. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the appropriate reservation.

4. In the Ribbon Bar click on the Copy Reservation button.

5. Make any changes or just simply click on the Save on the Ribbon Bar in the Actions Section. Note: You will see a pop up box that states that the reservation has been successfully saved and you will see the confirmation number.

6. Once the Reservation is saved, then from the Reservation screen, click on the Check-In button in the Actions box on the ribbon bar.

7. The next screen will be the Room Availability selection screen. Select an appropriate room from the list displayed by clicking on it then click OK.

8. The next screen is the Form of Payment screen, the guests method of payment will already be entered, click on OK to accept the form of payment.

9. You will receive a pop up message that the reservation has been Checked-In Successfully.
Check-In a Reservation with a Canceled Status

Currently you cannot check-in a Reservation with a Status of Canceled. You must first re-book the reservation. The simplest way is to copy the Canceled reservation first, then check-in as normal.

1. From the Reservations Module, select Reservation under Find.

2. Search for the reservation to be modified. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the appropriate reservation.

4. In the Ribbon Bar click on the Copy Reservation button.

5. Make any changes or just simply click on Save on the Ribbon Bar in the Actions Section. Note: You will see a pop up box that states that the reservation has been successfully saved and you will see the confirmation number.

6. Once the Reservation is saved, then from the Reservation screen, click on the Check-In button in the Actions box on the ribbon bar.

7. The next screen will be the Room Availability selection screen. Select an appropriate room from the list displayed by clicking on it then click OK.

8. The next screen is the Form of Payment screen, the guests method of payment will already be entered, click on OK to accept the form of payment.

9. You will receive a pop up message that the reservation has been Checked-In Successfully.
Check-In a Reservation Arriving Early

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, change the Arrive date to the current date. Update the correct number of nights or the correct Departure Date.

5. Make any changes or just simply click on Save on the Ribbon Bar in the Actions Section. Note: You will see a pop up box that states that the reservation has been successfully saved and you will see the confirmation number.

6. Once the Reservation is saved, then from the Reservation screen, click on the Check-In button in the Actions box on the ribbon bar.

7. The next screen will be the Room Availability selection screen. Select an appropriate room from the list displayed by clicking on it then click OK.

8. The next screen is the Form of Payment screen, the guests method of payment will already be entered, click on OK to accept the form of payment.

9. You will receive a pop up message that the reservation has been Checked-In Successfully.

Dividing Postings before Check-In on a Reservation

Divided Folios can be setup before the guest checks into the hotel to save time.

1. From the Reservation Module, select Reservation under Find.

2. Search for the reservation you wish to display. Note: There are several ways to search for a particular reservation. From the All Guests dropdown, choose the appropriate filter. You can then choose a sub filter. Choices include: Confirmation Number, Last Name, First Name, Arrival Date, Departure Date, Hold Type, Room #, Room Type, Res Status and Folio#. Click on the Search button. Note: All fields do not have to be filled out in order to search for the guest. It is important to remember that the more fields filled in, it narrows the search.

3. Double click on the record you want to display.

4. Once on the Reservation screen, click on the Folio button in the Show box on the ribbon bar.
5. The Divide Postings button on the Folio ribbon bar offers two options – New – which allows the user to set up Divide Postings & Move Items – which allows the user to move transactions that have taken place prior to establishing Divide Postings to the appropriate folio(s).

6. If you click on the New option in the Divide Postings drop down, you will get a pop-up box, which allows the user to either assign a folio letter to either Department Groups or Department Codes. The user can assign Department Groups or Department Codes to folio letters A to F. Once completed, click on the Save button. Note: There are options on the pop-up box to Restore Defaults – place all future transactions on the A folio and Consolidate – which takes all current transactions and places them on the A folio.

7. You will then be returned to the folio screen. On the left hand side of the folio screen, you will see an All tab and tabs from A to F. Clicking on any of these tabs will display transactions for those particular folios. On the far right hand side of the All screen, you will see a letter (A to F) in the Folio column. This will tell you which folio has that particular transaction on it.

8. After the folios have been divided, you may want to continue and set up the payments for each folio.

9. The Payments button on the Folio ribbon bar, allows the user to add different methods of payments to different folios, to authorize credit cards, view credit card numbers (if Security allows) and change methods of payments. Note: If you enter a credit card type as a method of payment, you will be required to enter a valid credit card number.

10. Click in the Payment Type square, to choose the payment method you require. Once completed, click on the Save button. You will get a Saved Successfully pop-up box. Then click Ok and Close.

Note: The Credit Limit and Pay By method on the Ribbon bar is reflecting Folio “A”.

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**Group Check-In**

1. Choose Groups from the navigation bar on the left hand side of the screen. Note: You can either click on Groups or right click on Groups and choose to ‘Open in same tab’ or ‘Open in a new tab’ from the Main Screen.

2. Under Find, click on Group Booking.

3. On the search page, in the box that has All Groups, click on the drop down arrow and choose the appropriate filter. Then click on the Search button. Note: There are additional filters that you can use to narrow your search. Those filters are Code, Name, Master, Arrives, Departs, Cutoff Date, Status & Corporate Profile.

4. The Rooming List button in the Show box on the ribbon bar, allows you to add reservations to the Group Booking, if you have been presented with a rooming list. Fill in the information at the bottom of the screen and when complete, click on the Add Guests button, beside the green circle with the plus sign on the bottom left hand side of the screen. The reservations then will populate in the area in the middle of the screen. Note: Clicking on the confirmation number beside the reservation will take you to that reservation. You also can add
more than one room when adding reservations to a rooming list. You may need to click on the Room Matrix button, if you want to review the room types that are blocked for your group.

5. Once reservations have been made for the group – either individually or by a rooming list, there is a button on the ribbon bar on the group booking screen that allows you to Assign Rooms. Click on the Rooming List button on the ribbon bar and click on the Select All button on the left hand side of the middle screen. All the reservations will then have a check box beside the confirmation number and the middle of the screen will be shaded. Click on the Assign Rooms button on the ribbon bar. You will then see a pop-up box that allows you to Assign Rooms For & Assign Rooms By. The options for Assign Rooms For are for either Selected Reservations & All Unassigned Reservations. Options for Assign Rooms By are Use Any Available Room & Room Number – with a choice to try and keep the reservations for the group between certain room numbers – thus keeping them all together. Click Ok and in the Room # column on the far right hand side, you will see room numbers assigned. Click the yellow Save button on the top left hand side of the ribbon bar and your room assignments will be saved.

6. The Group Check-In button, allows you to check-in all reservations related to the group, as long as all criteria has been met – Arrival Date for Guest Reservation is the Current Business Day, The Guest Reservation has a room blocked that is currently clean and vacant & The Guest Reservation has a valid form of payment to complete the check in process. Note: The status for the group must be Open before the Group Check-In button is available for access.

Creating a House Account
House Accounts are used to post charges & payments that are not posted to a guest account. Note: Ordinarily house account postings equal each other and the balance on the account would be zero.

1. From the Front Office Module, select House Account under New. Note: You can either click on Front Office or right click on Front Office and choose to ‘Open in same tab’ or ‘Open in a new tab’ from the Main Screen.

2. In the Account Number Field either enter a number of your choice or click the Assign tab.

3. Note: If the Account Number is already in use you will get a message when saving that “This will not be saved.” Either enter a different Account Number or click the Assign tab. If the Assign tab is selected then the system will automatically assign the next number available. You will get a pop up window advising that “Auto-assignment is pending.”

4. Enter an Account Name or what this account is to be used for. At this point all the required fields have been completed. You can click on Save on the Ribbon Bar in the Actions Section.

5. A Credit Limit can be entered if you to keep track of the balance as compared to the approval limit.

6. Add any additional information as needed. Contact Name, Address (if needed), Telephone, Payment Type or Comments.

7. When done entering all the desired information, Click on Save on the Ribbon Bar in the Actions Section.