



Guest Rooms - Settling Folio Card

2018 - Spring Edition

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Overview

A **Folio** is the billing record for an individual currently staying in one of the guest rooms. This guide will discuss how to settle a Folio to a card already on file.

Use Case(s)

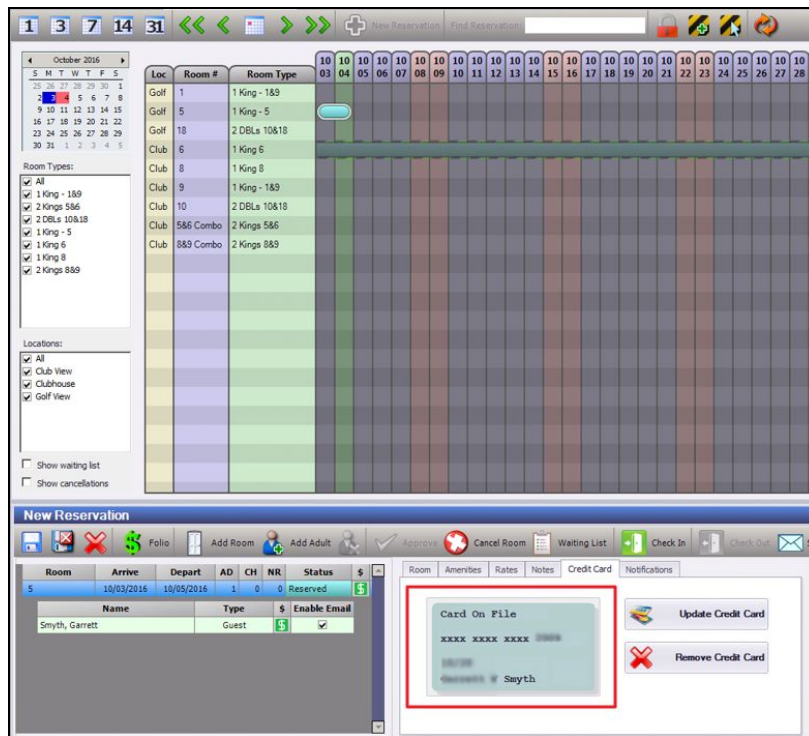
As a Club Admin, you would like to be able to settle a Guest Room Folio to a card already on file as opposed to a manual entry.

Accessing the Tool

To access the Folio, you must first view the reservation; accessible through the CMA then Guest Rooms.

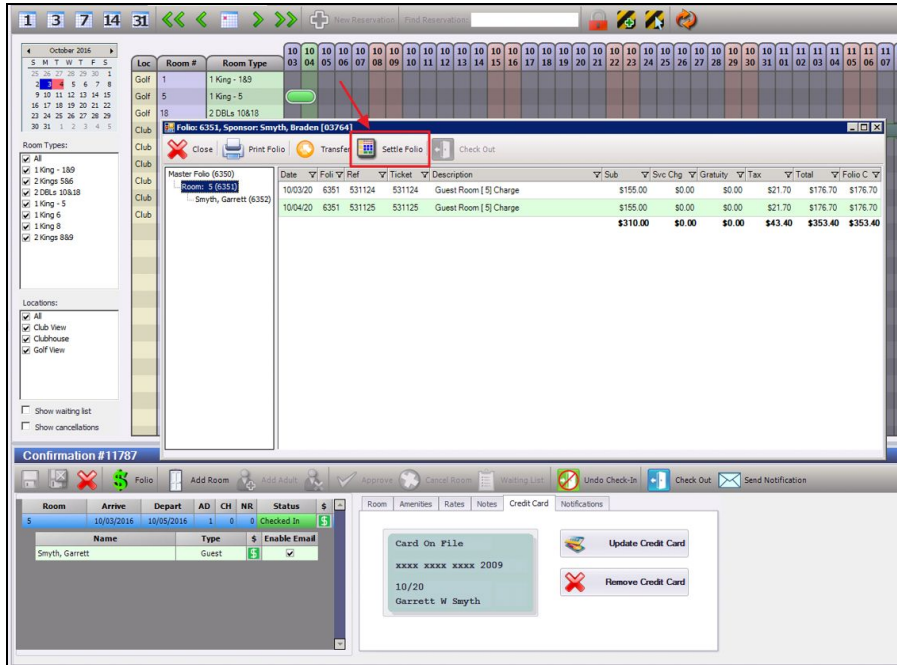


If you have captured a credit card for the room reservation, you will see the credit card on file under the **credit card tab**, as shown below, when the reservation is selected.

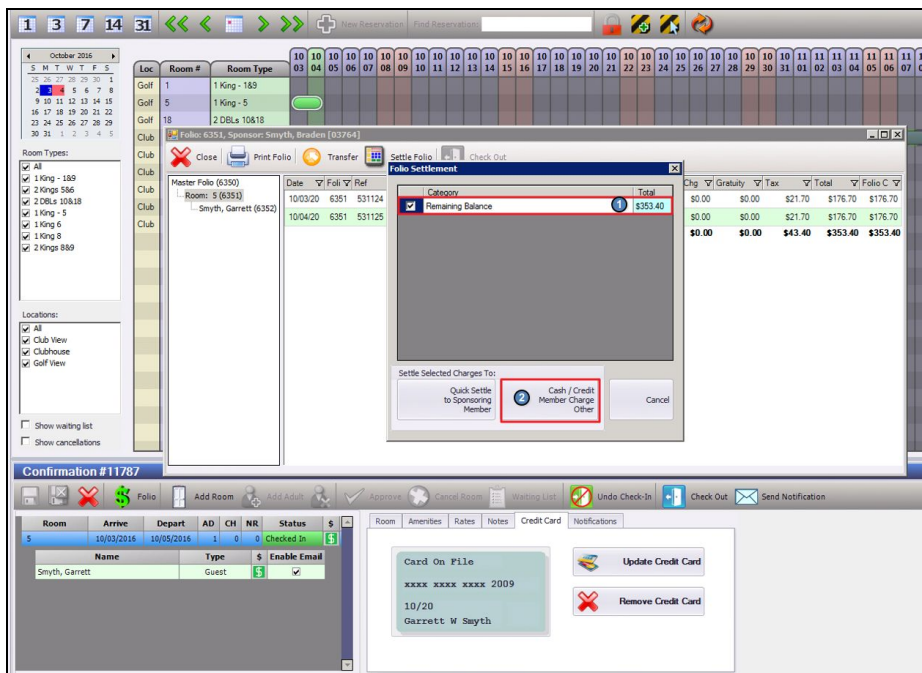


Settle Folio

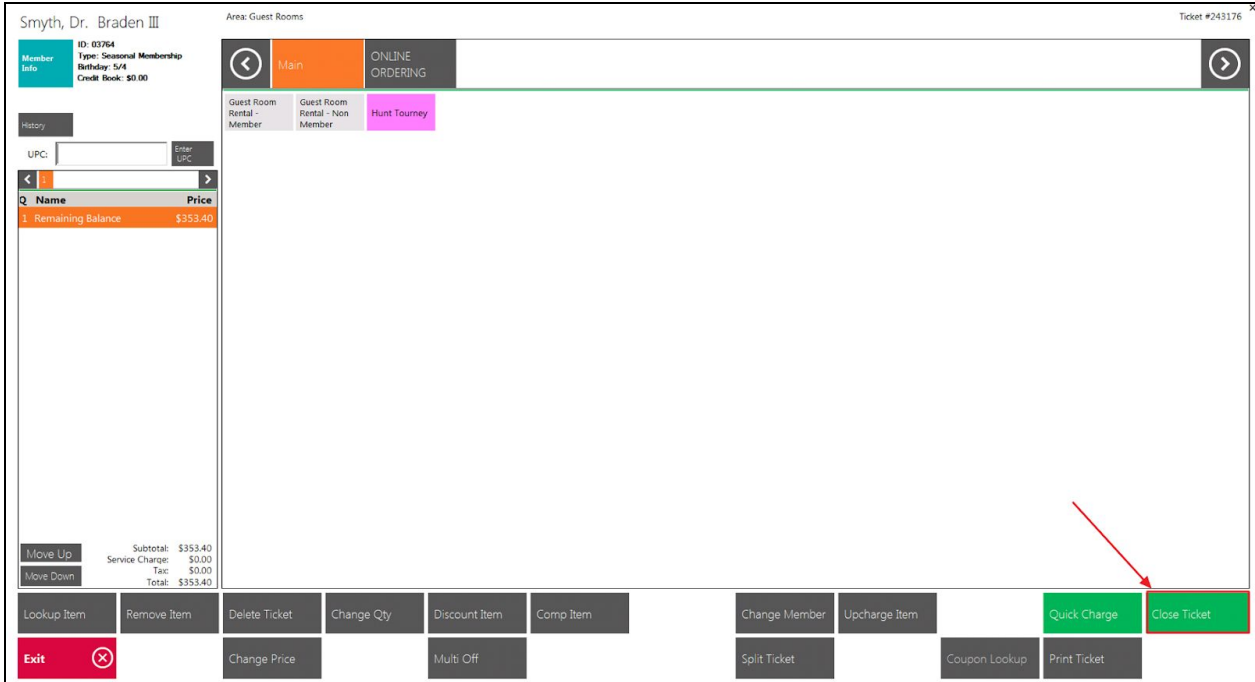
To settle a folio to the credit card on file, select **'Settle Folio'**.



The Folio Settlement screen will launch which will show the balance that's to be settled. Next, select **'Cash/Credit Member Charge Other'** in order to launch the POS.



Select **'Close Ticket'** to bring up other settlement options.



Smyth, Dr. Braden III Area: Guest Rooms Ticket #243176

Member Info: ID: 03764, Type: Seasonal Membership, Birthday: 5/4, Credit Book: \$0.00

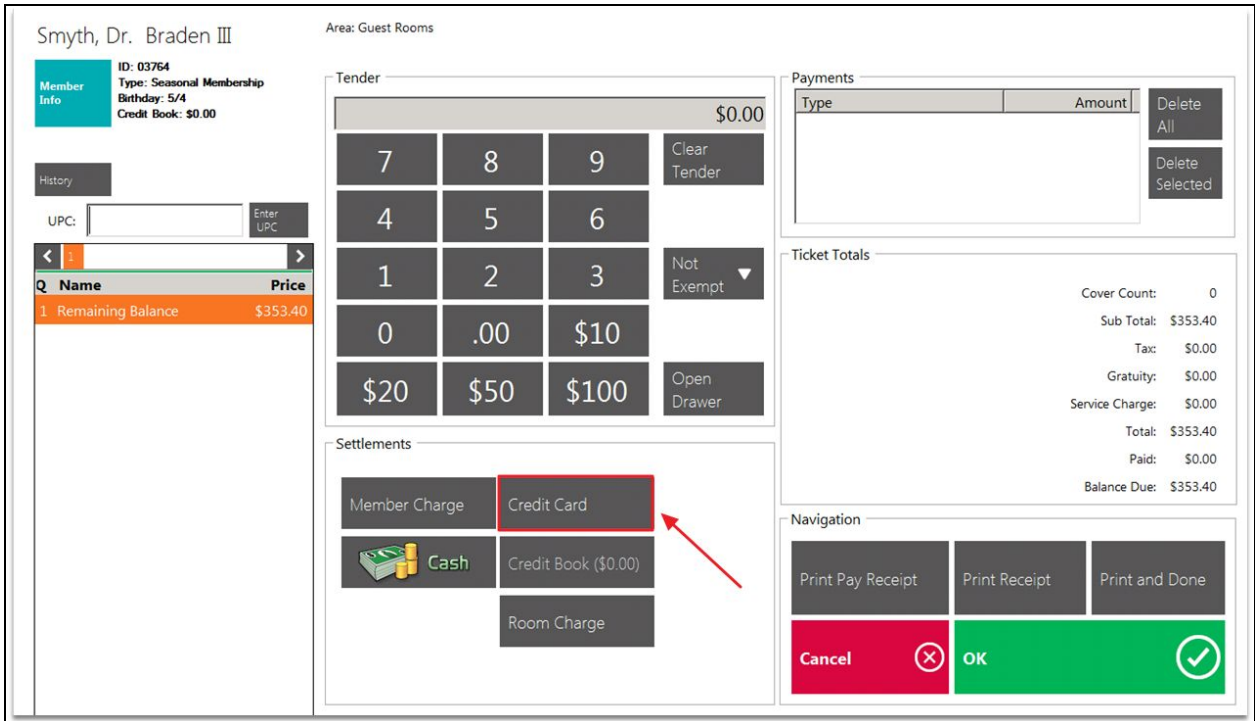
History: UPC: [] Enter UPC

Q	Name	Price
1	Remaining Balance	\$353.40

Subtotal: \$353.40, Service Charge: \$0.00, Tax: \$0.00, Total: \$353.40

Buttons: Lookup Item, Remove Item, Delete Ticket, Change Qty, Discount Item, Comp Item, Change Member, Upcharge Item, Quick Charge, Close Ticket, Exit, Change Price, Multi Off, Split Ticket, Coupon Lookup, Print Ticket

From the settlement screen, select **'Credit Card'**.



Smyth, Dr. Braden III Area: Guest Rooms

Member Info: ID: 03764, Type: Seasonal Membership, Birthday: 5/4, Credit Book: \$0.00

History: UPC: [] Enter UPC

Q	Name	Price
1	Remaining Balance	\$353.40

Tender: \$0.00

Payments:

Type	Amount	Delete
		All
		Delete Selected

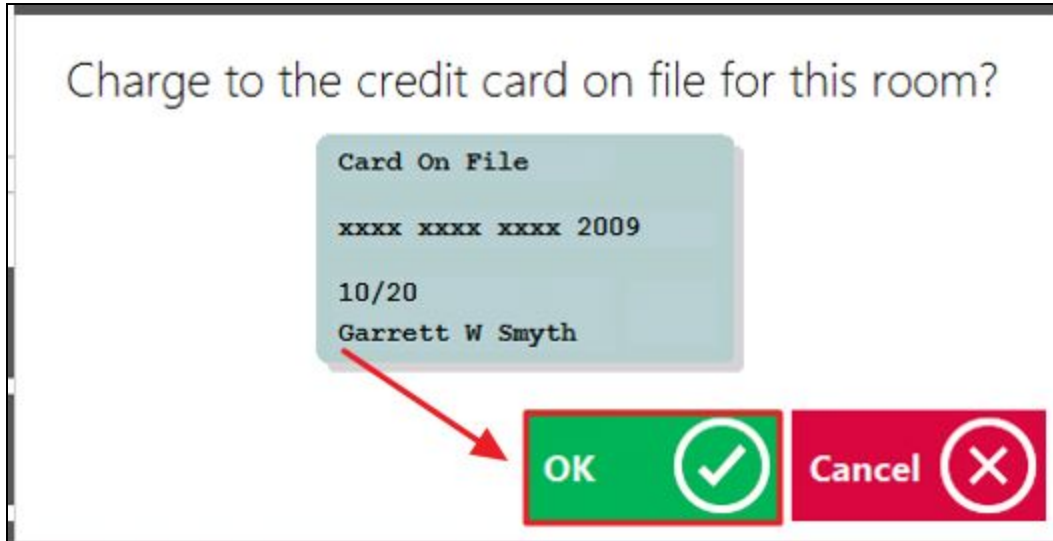
Ticket Totals:

Cover Count:	0
Sub Total:	\$353.40
Tax:	\$0.00
Gratuuity:	\$0.00
Service Charge:	\$0.00
Total:	\$353.40
Paid:	\$0.00
Balance Due:	\$353.40

Navigation: Print Pay Receipt, Print Receipt, Print and Done, Cancel, OK

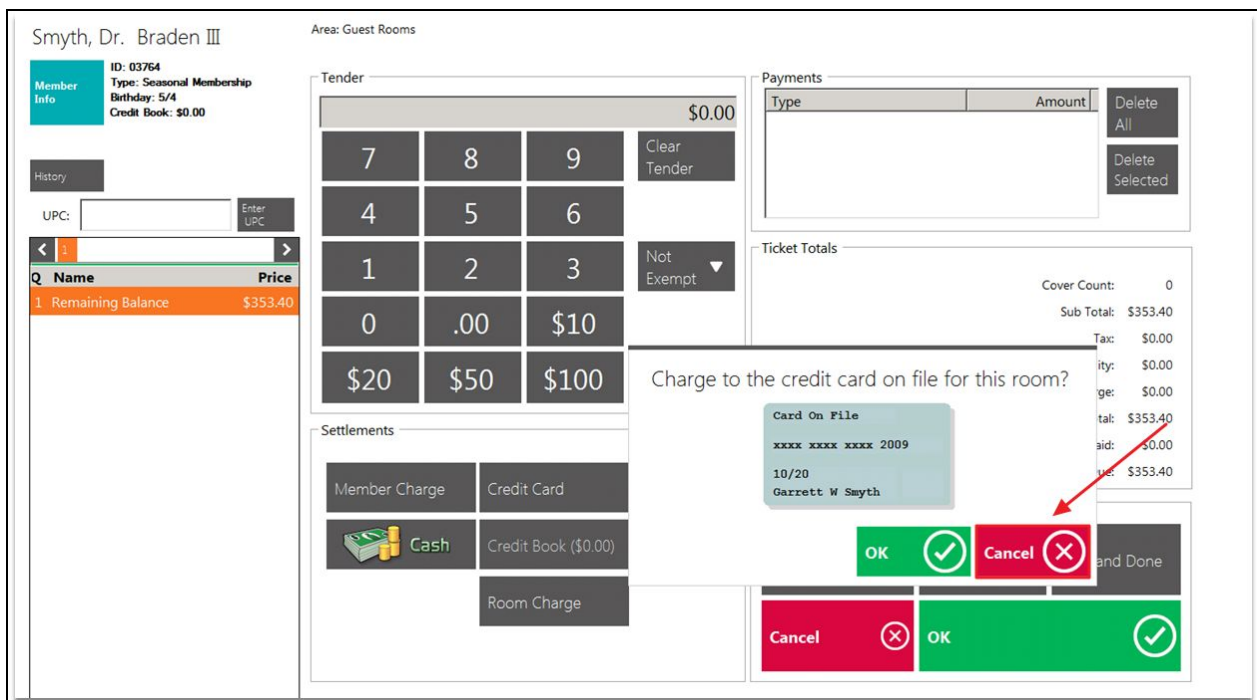
Settlements: Member Charge, Credit Card, Cash, Credit Book (\$0.00), Room Charge

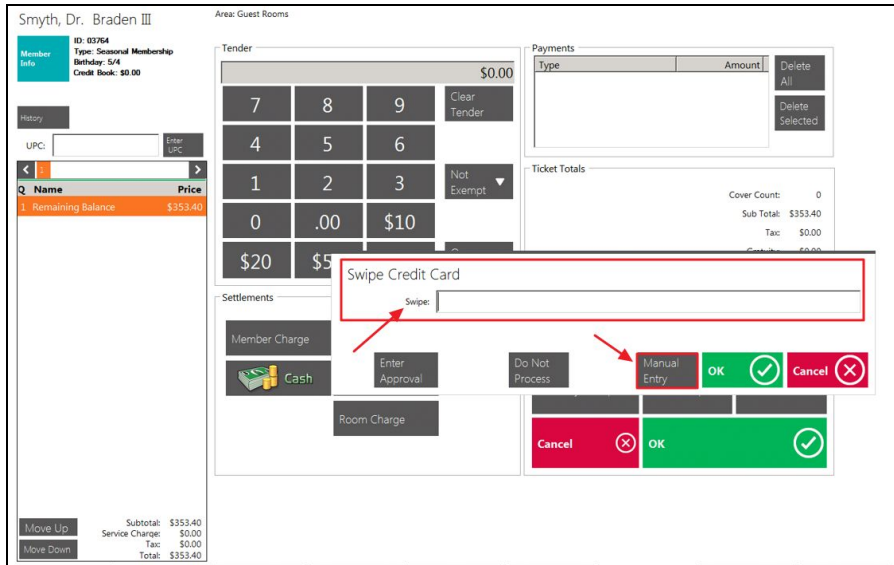
If a credit card is on file, the system will ask to charge to the credit card on file. Select **'OK'** to use this credit card on file.



Please Note: depending on your payment processor (ETS, Shift 4, or Open Edge) you may need to select 'Print and Done' after you select the credit card settlement to trigger this window.

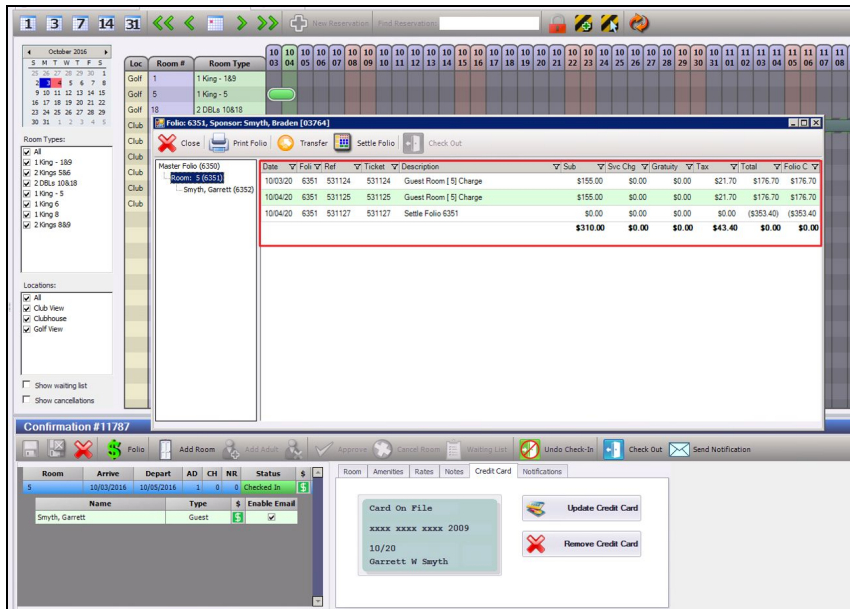
If you wish to use another credit card to settle this transaction, select **'Cancel'** which will allow you to swipe or manually enter another credit card.





Please Note: only one credit card may be attached to one room. You cannot attach a credit card to only the occupant. So if the occupant needs to settle his/her folio to a different credit card, that is when you would NOT use the credit card on file, and enter the information with the swipe or manual entry.

You will now be able to view the settled folio for the member.

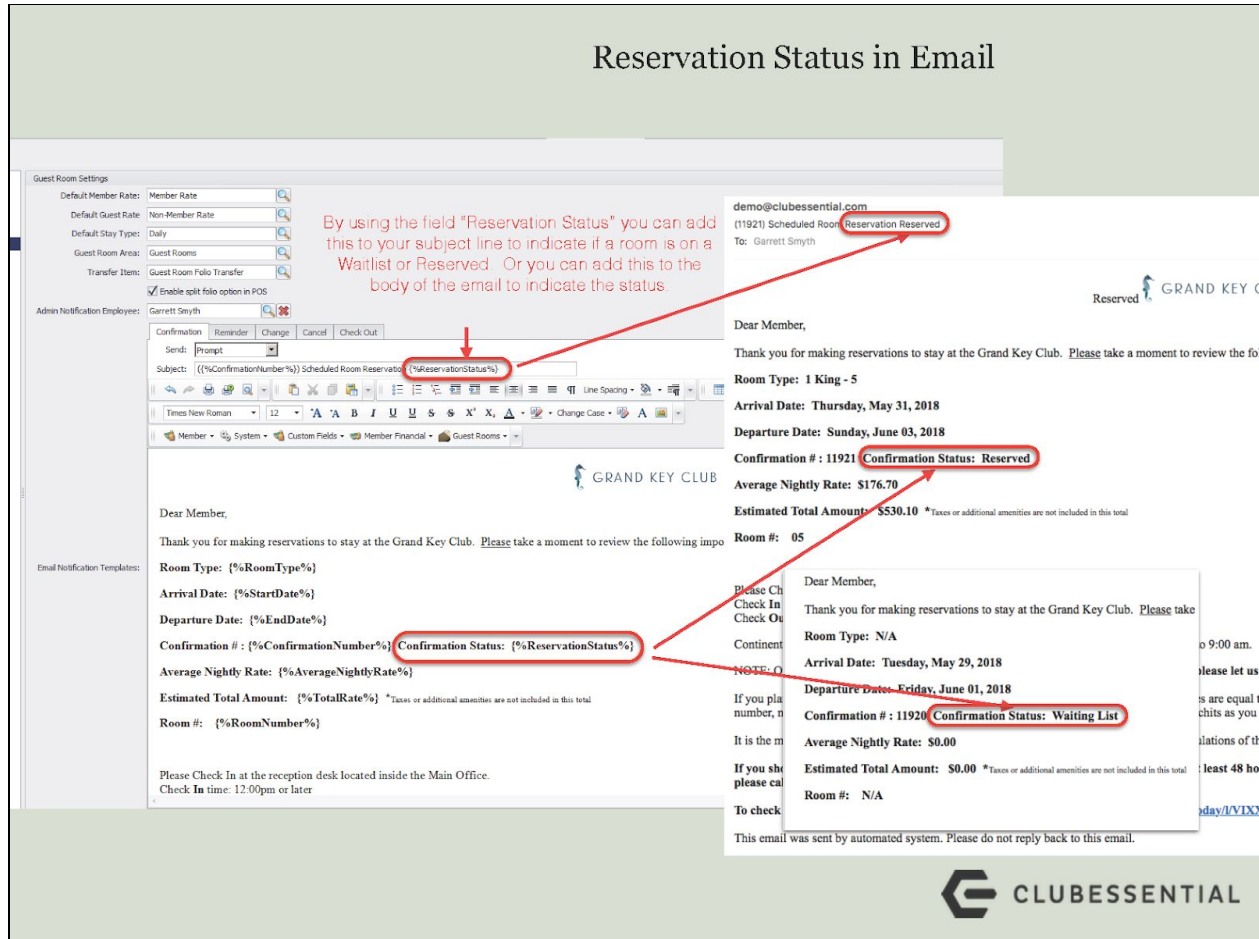


Reservation Status

You may use the Reservation Status for guest rooms in emails to notify guests of the current guest room status: reserved, waitlist, canceled.

To add the Reservation Status, use the following snippet in the subject line or body of the email: **{%ReservationStatus%}**.

Reservation Status in Email



By using the field "Reservation Status" you can add this to your subject line to indicate if a room is on a Waitlist or Reserved. Or you can add this to the body of the email to indicate the status.

demo@clubessential.com
 (11921) Scheduled Room Reservation Reserved
 To: Garrett Smyth

Dear Member,
 Thank you for making reservations to stay at the Grand Key Club. Please take a moment to review the following information:

Room Type: 1 King - 5
Arrival Date: Thursday, May 31, 2018
Departure Date: Sunday, June 03, 2018
Confirmation #: 11921 Confirmation Status: Reserved
Average Nightly Rate: \$176.70
Estimated Total Amount: \$530.10 *Taxes or additional amenities are not included in this total
Room #: 05

Dear Member,
 Thank you for making reservations to stay at the Grand Key Club. Please take a moment to review the following information:

Room Type: N/A
Arrival Date: Tuesday, May 29, 2018
Departure Date: Friday, June 01, 2018
Confirmation #: 11920 Confirmation Status: Waiting List
Average Nightly Rate: \$0.00
Estimated Total Amount: \$0.00 *Taxes or additional amenities are not included in this total
Room #: N/A

This email was sent by automated system. Please do not reply back to this email.

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