Guest Rooms - Deposits

2018 - Fall Edition

User Guide - Table of Contents

Overview

- Use Case(s)

Updating Room Information

Entering Credit Card

Settle Folio

Overview

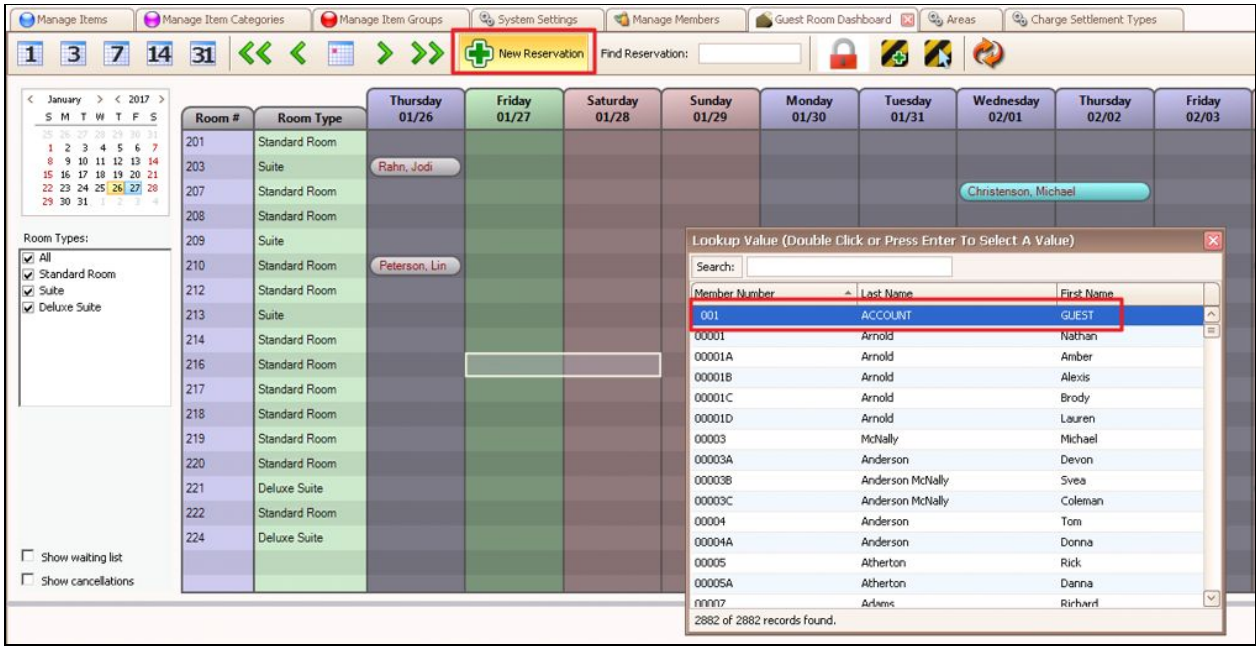
When Members book a Guest Room, sometimes a deposit needs to be held. This guide covers the basics on how to add a Deposit using a Credit Card to a Folio.

Use Case(s)

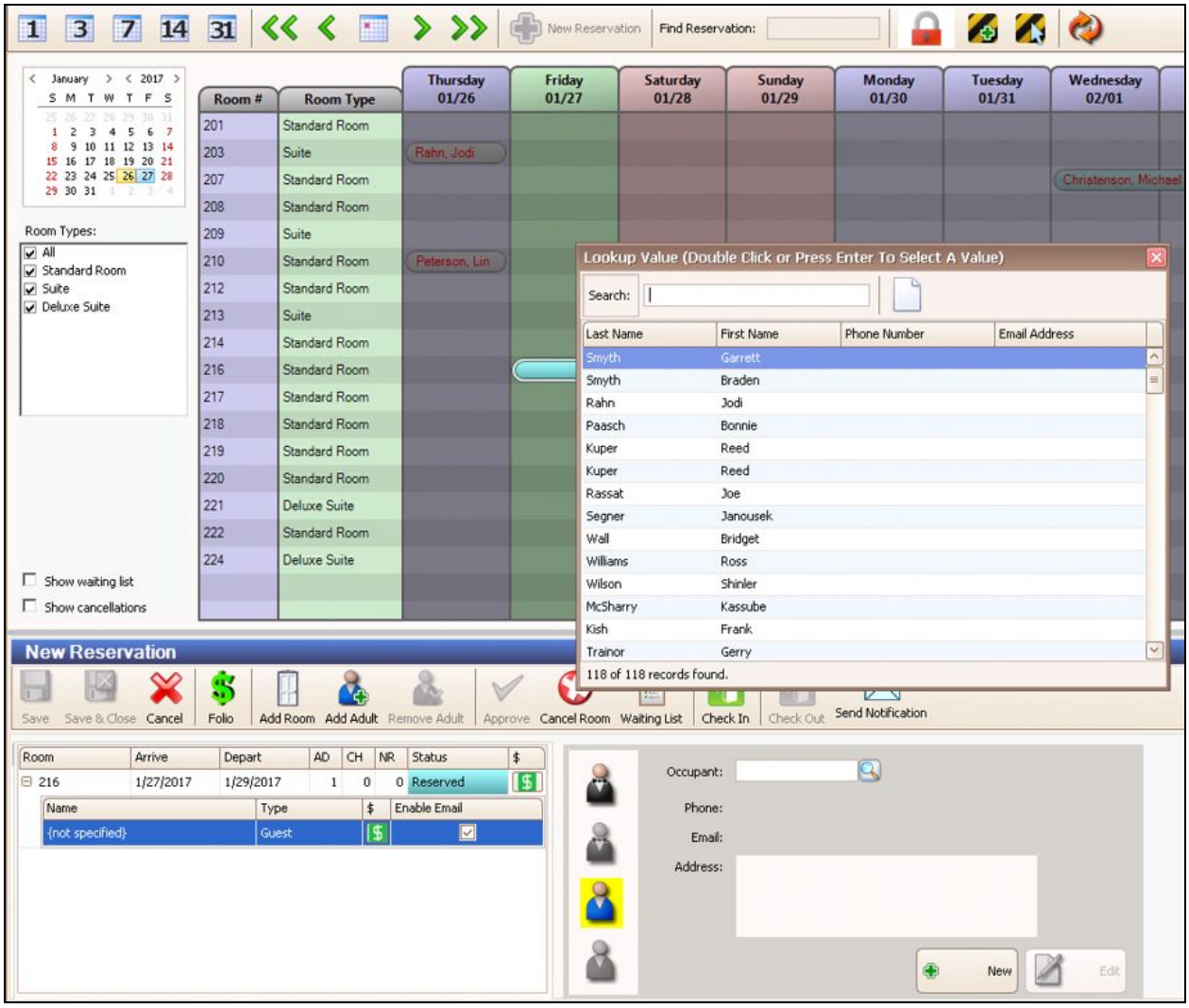
User needs to add a Deposit to a Guest Room using the Member's Credit Card.

Updating Room Information

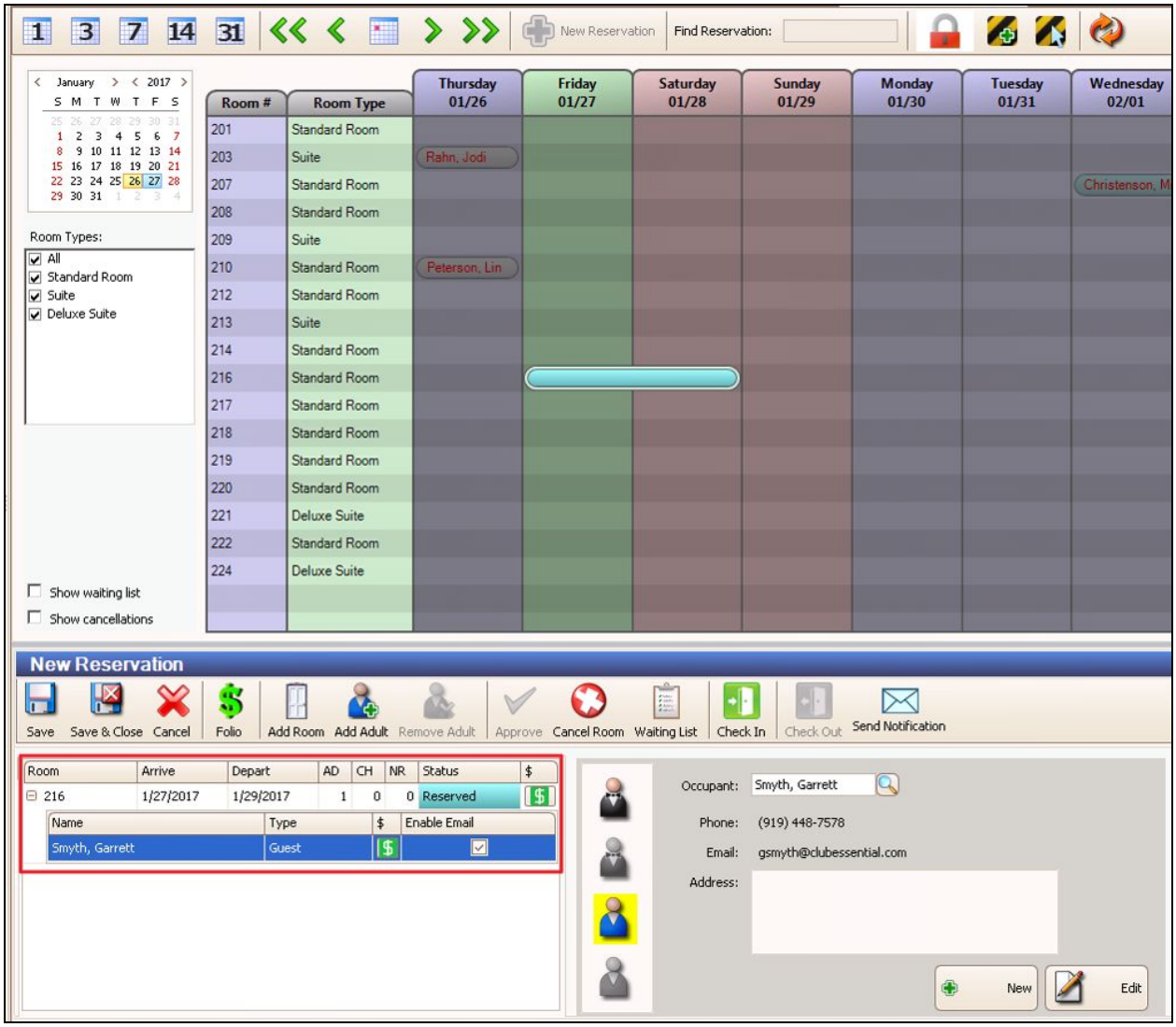
1) Book a Reservation for the specific Member.



2) Enter the number of occupants staying in the room.

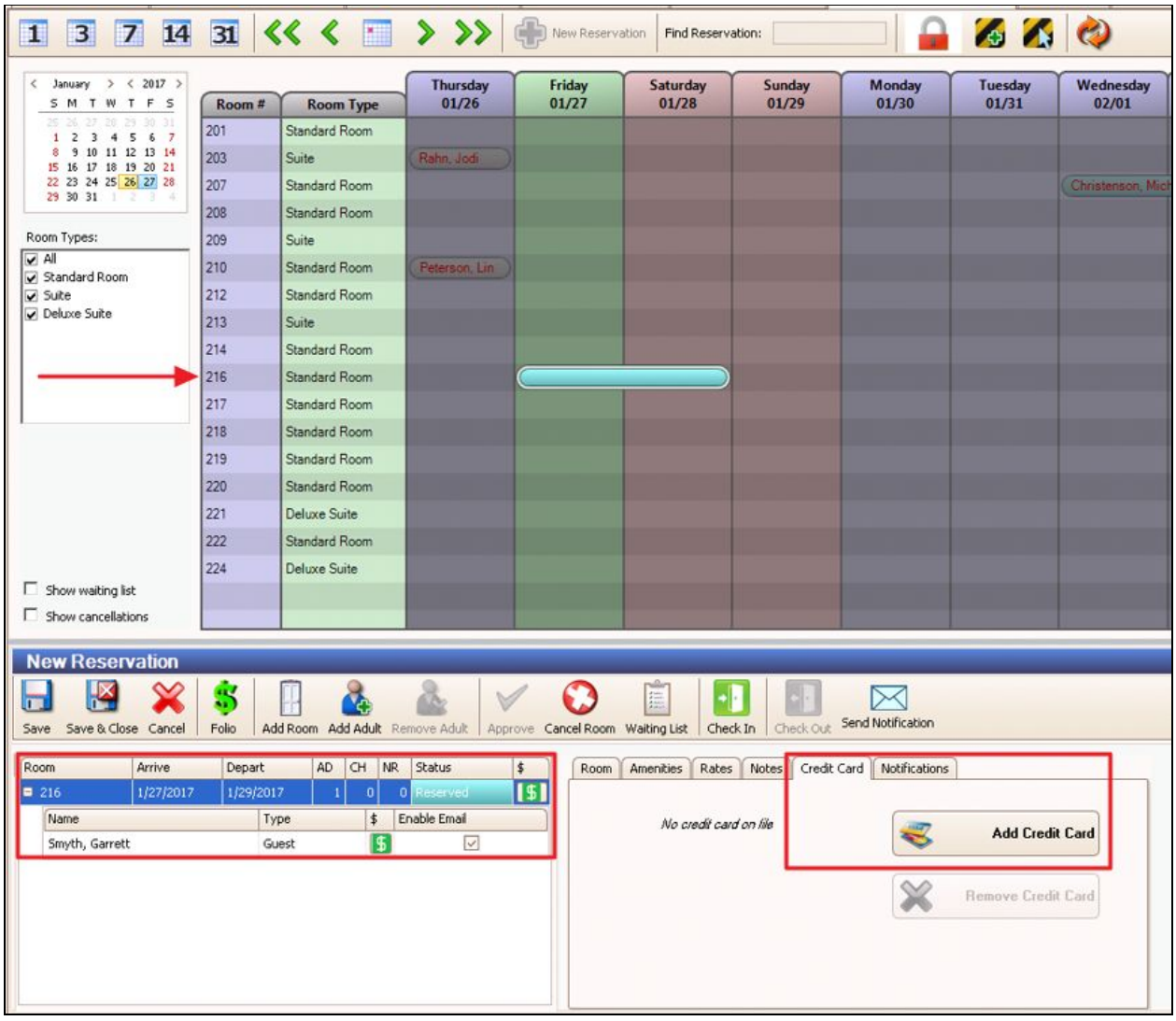


3) Select a room to update the information.


New Reservation
Find Reservation:
Room #
Room Type
Thursday 01/26
Friday 01/27
Saturday 01/28
Sunday 01/29
Monday 01/30
Tuesday 01/31
Wednesday 02/01
Rahn, Jodi
Peterson, Lin
Christenson, M
Room Types:
All
Standard Room
Suite
Deluxe Suite
Show waiting list
Show cancellations
New Reservation
Save
Save & Close
Cancel
Folio
Add Room
Add Adult
Remove Adult
Approve
Cancel Room
Waiting List
Check In
Check Out
Send Notification
Room
Arrive
Depart
AD
CH
NR
Status
$
216
1/27/2017
1/29/2017
1
0
0
Reserved
Name
Type
Enable Email
Smyth, Garrett
Guest
Occupant:
Smyth, Garrett
Phone:
(919) 448-7578
Email:
gsmyth@clubessential.com
Address:
New
Edit

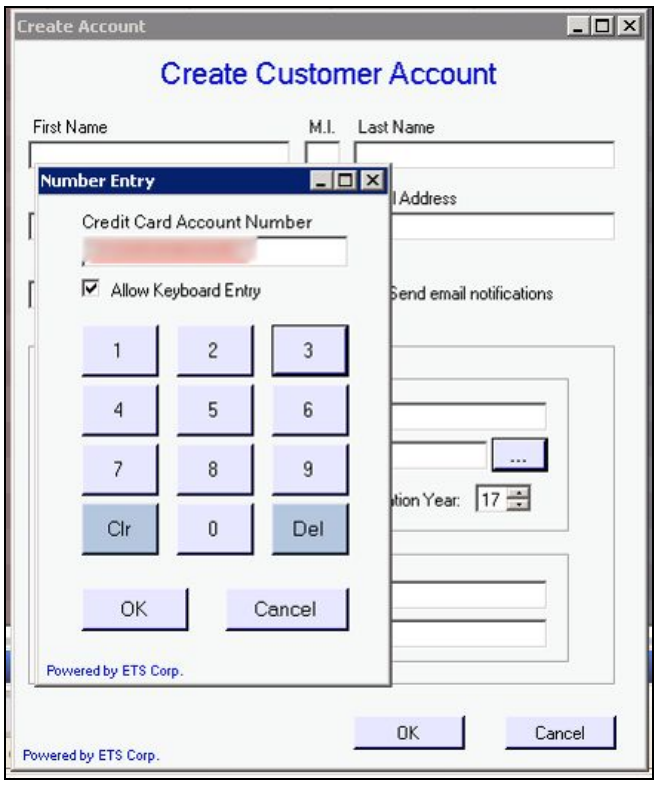
Entering Credit Card

Once the reservation has been made, select the corresponding room and select **Add Credit Card**.



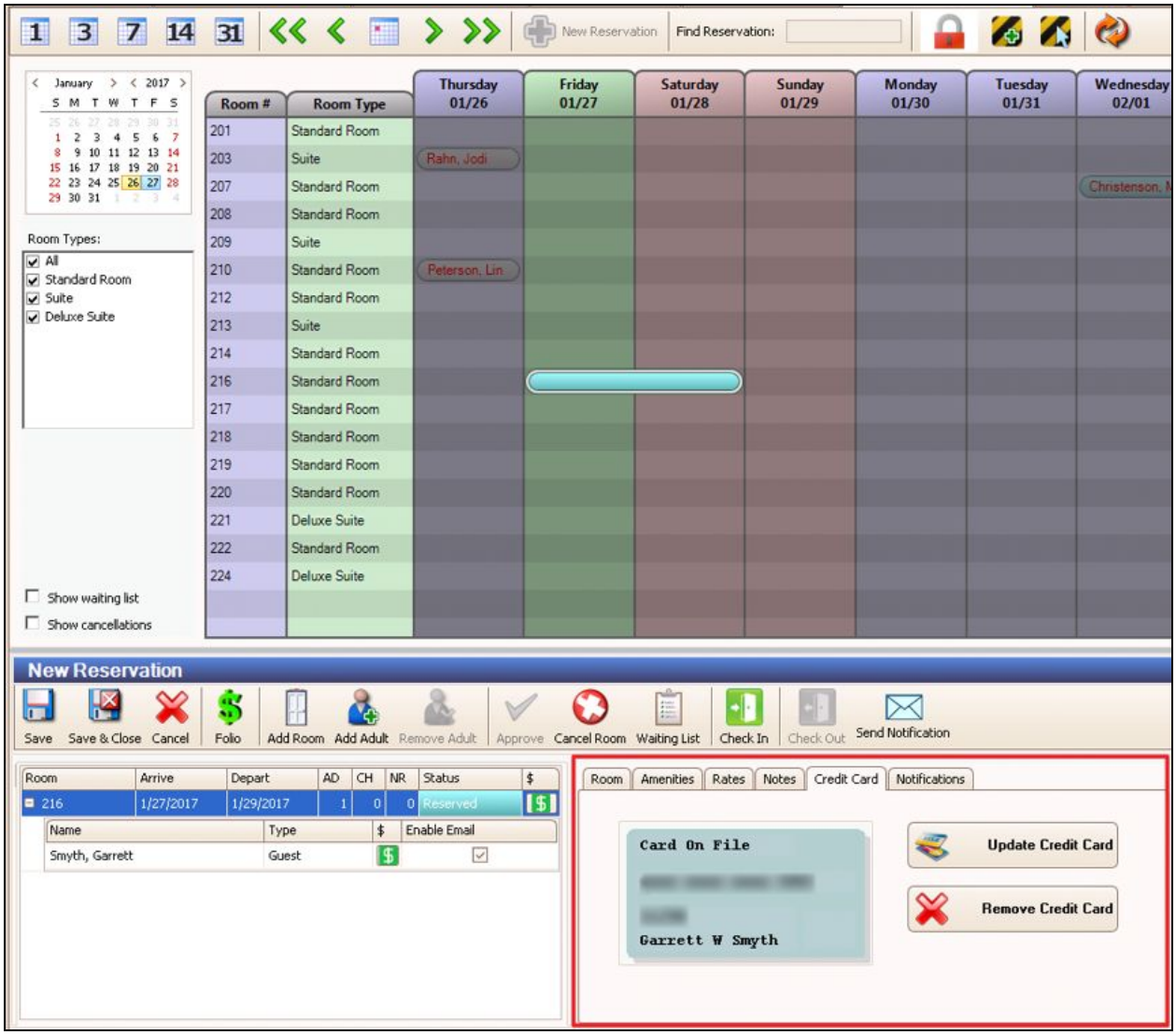
Please Note: *Open Edge/PPI platforms do not support saving a credit card for a room.*

Once **Add Credit Card** is selected, a window will populate allowing the User to enter Member Credit Card information.



Please Note: *ETS is the current example, the window from a different Payment Processor may look slightly different.*

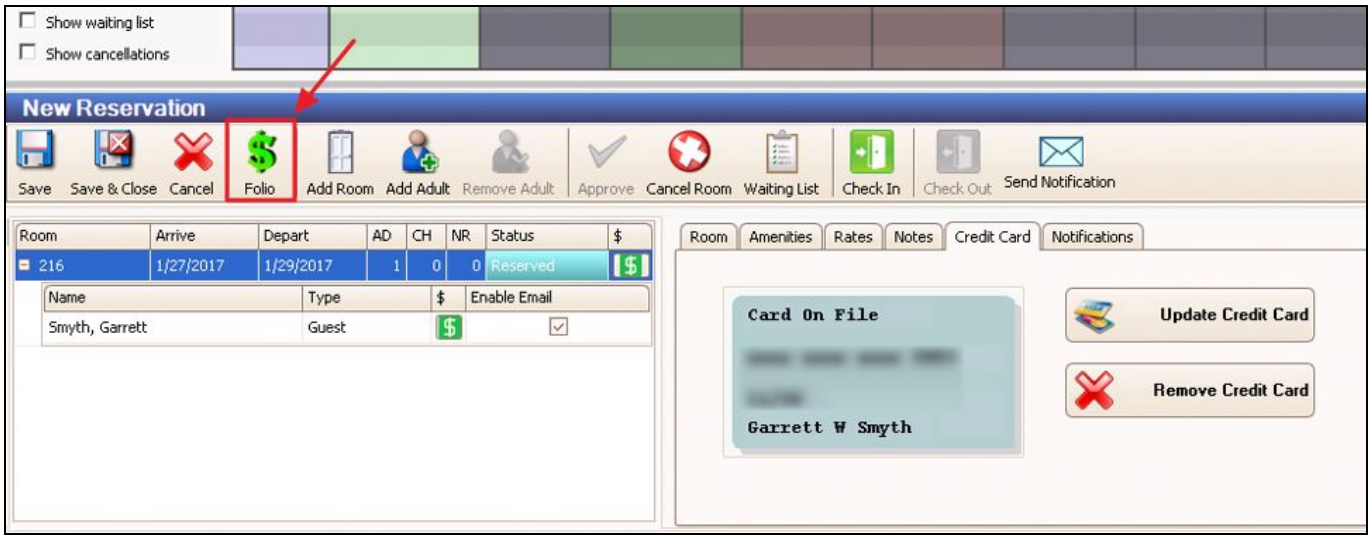
Once Member Credit Card information has been entered and saved, it will populate for the room, as seen below.



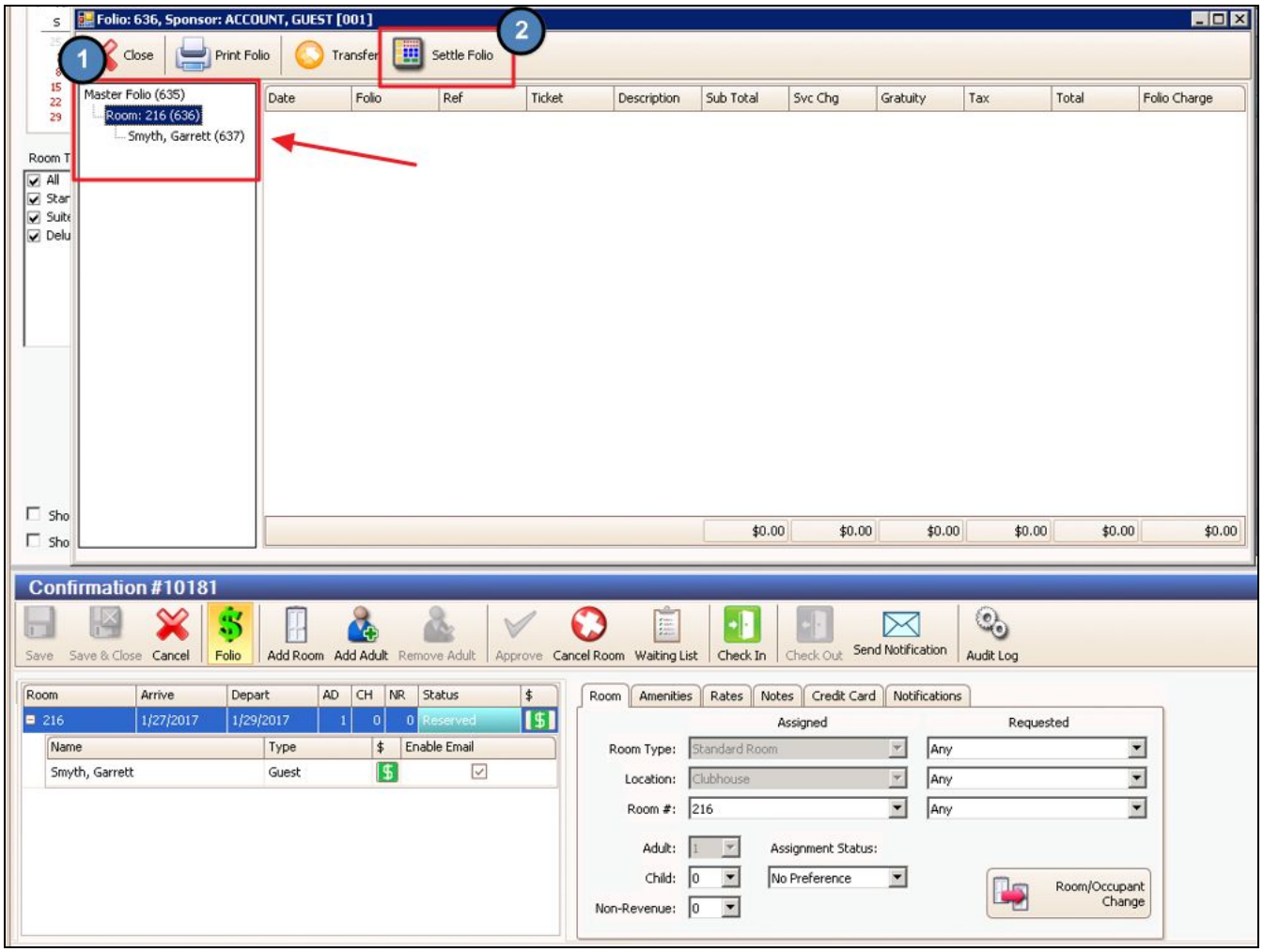
Please Note: *Credit cards are linked to **rooms** not individual occupants. If two or more occupants are in a room, only **one** credit card may be attached to a room.*

Settle Folio

Select the **Folio** Button to open the Folios for this reservation.

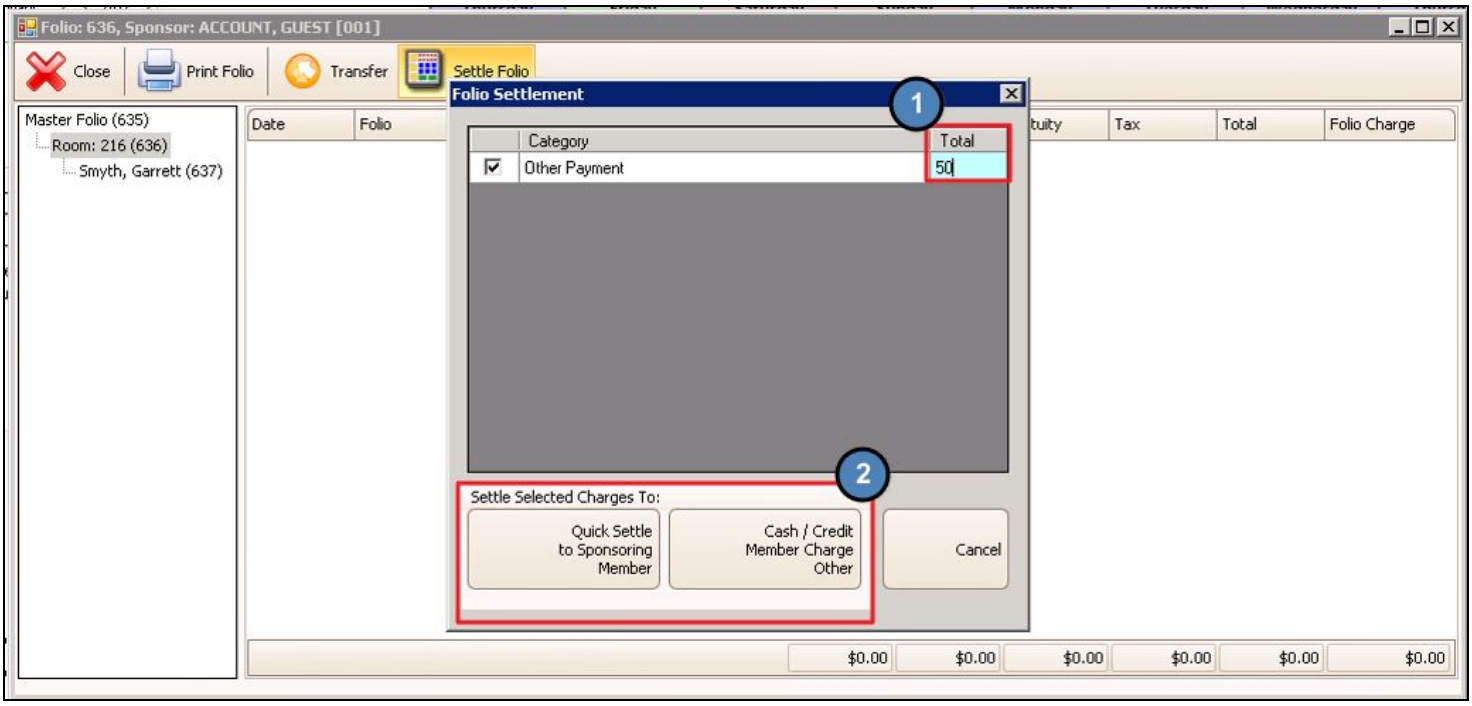


Select the room to add the **Deposit**. Then select **Settle Folio**.



Enter the **amount** for the Deposit.

Then choose whether to quickly settle this deposit to the sponsoring **Member Account** or **Cash/Credit/Member Charge Other** to open POS to settle another way.

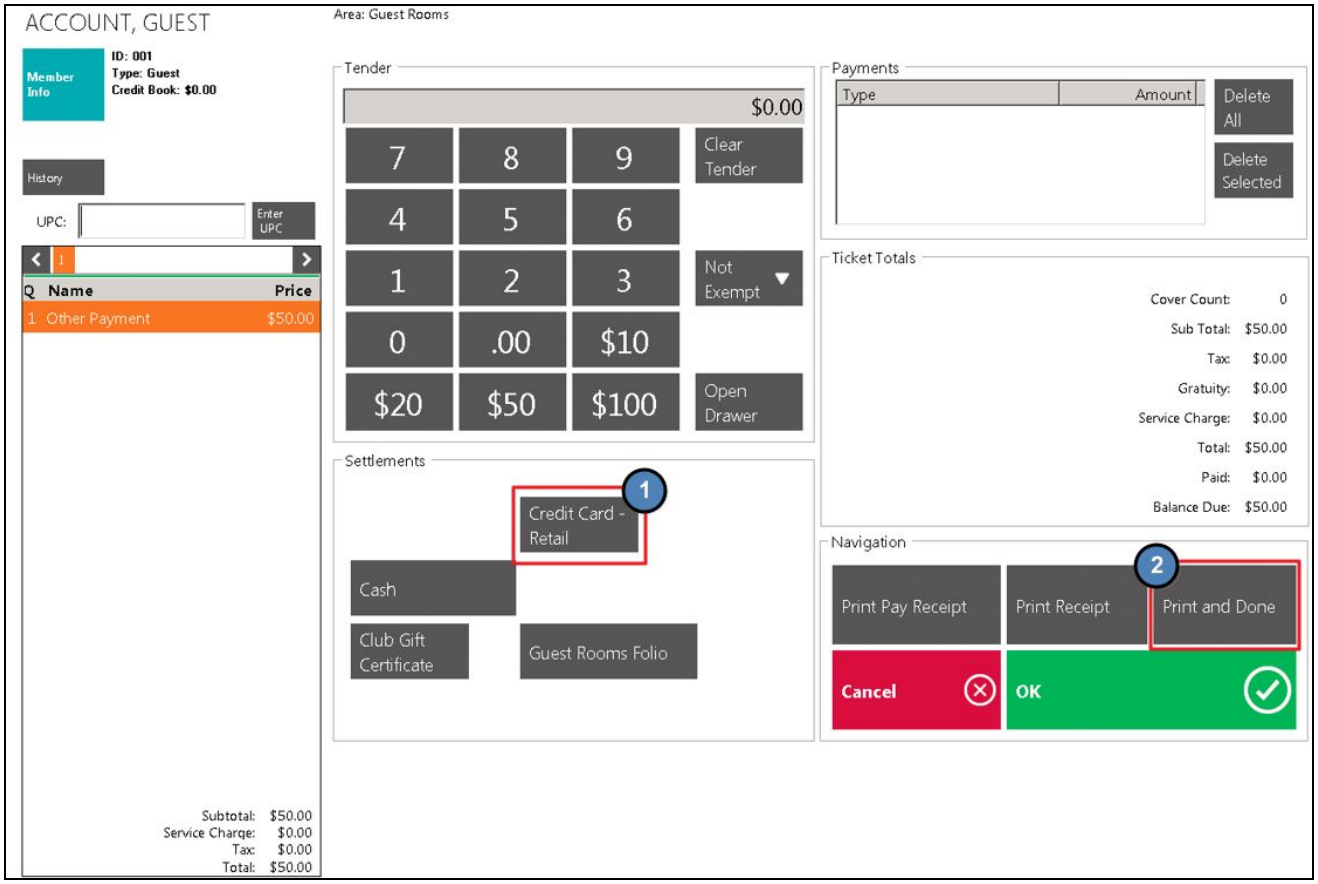


The Screen Group created for the Guest Rooms module will open and show the deposit amount on a ticket waiting for you to settle.

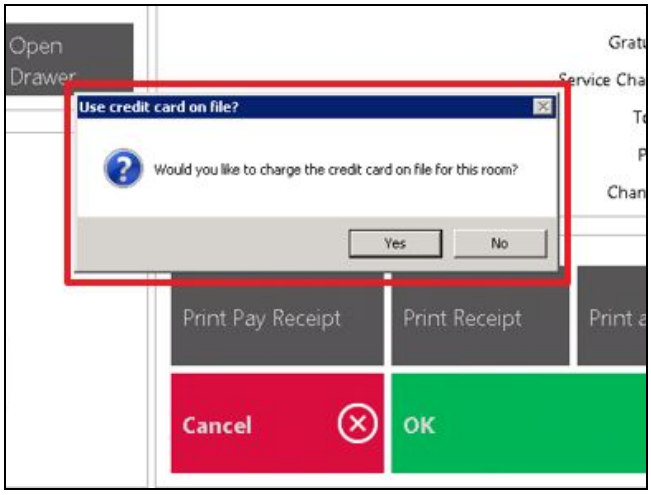
Select **Close Ticket** to move to the settlement screen.

Select the method you wish to settle the deposit. In the example below we will select the **Credit Card** settlement type.

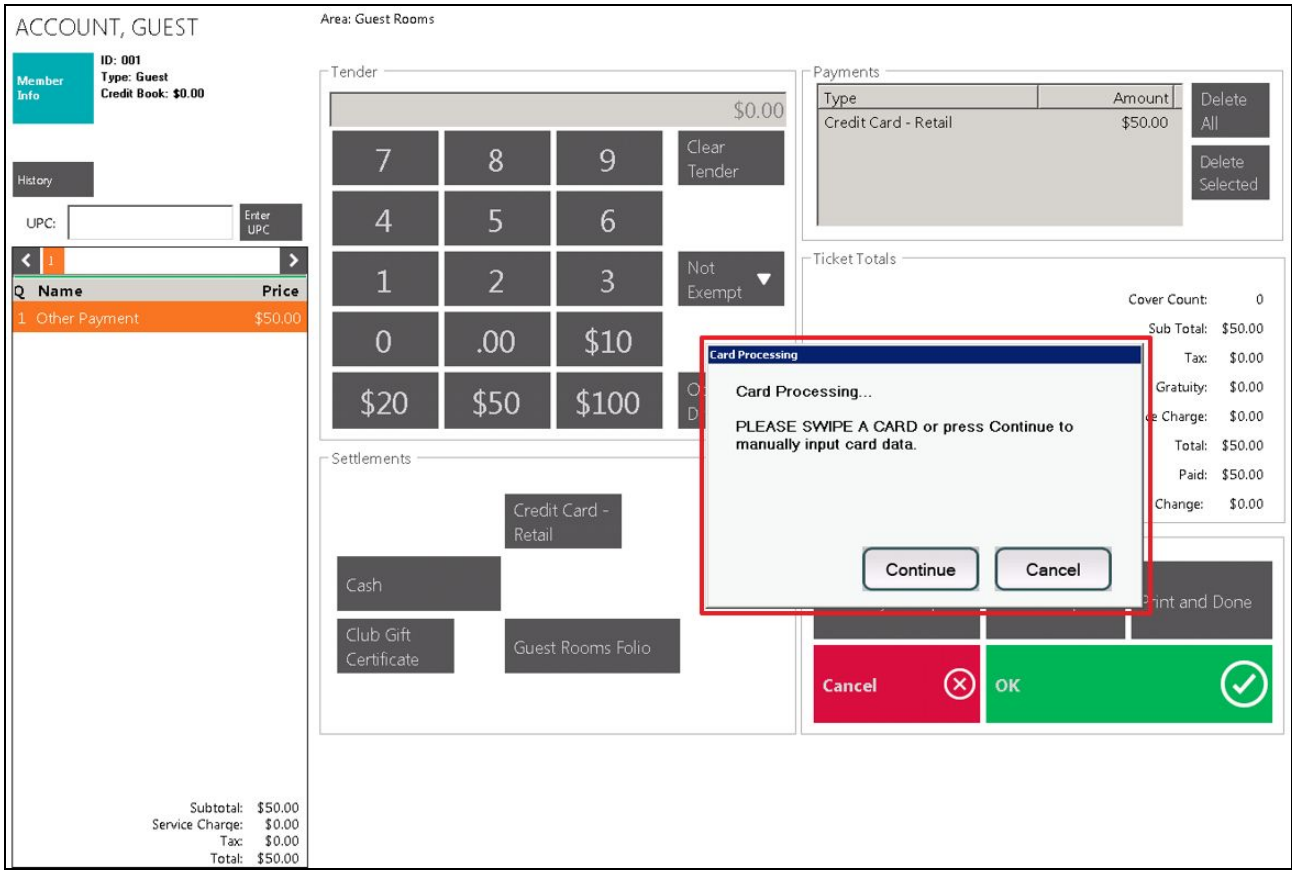
Select **Print & Done** to start the credit card process.



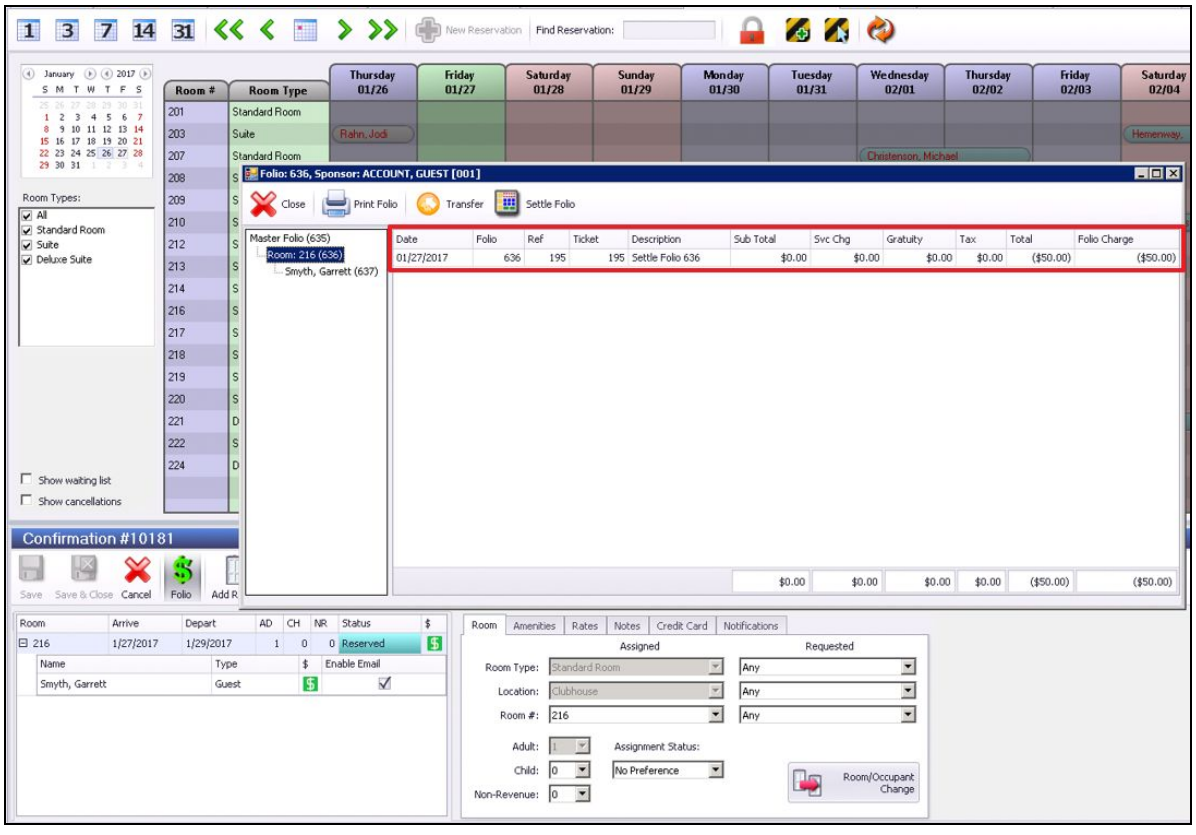
If there is already a Credit Card assigned to the room, a prompt will ask if the card on file is the one to be used for this room.



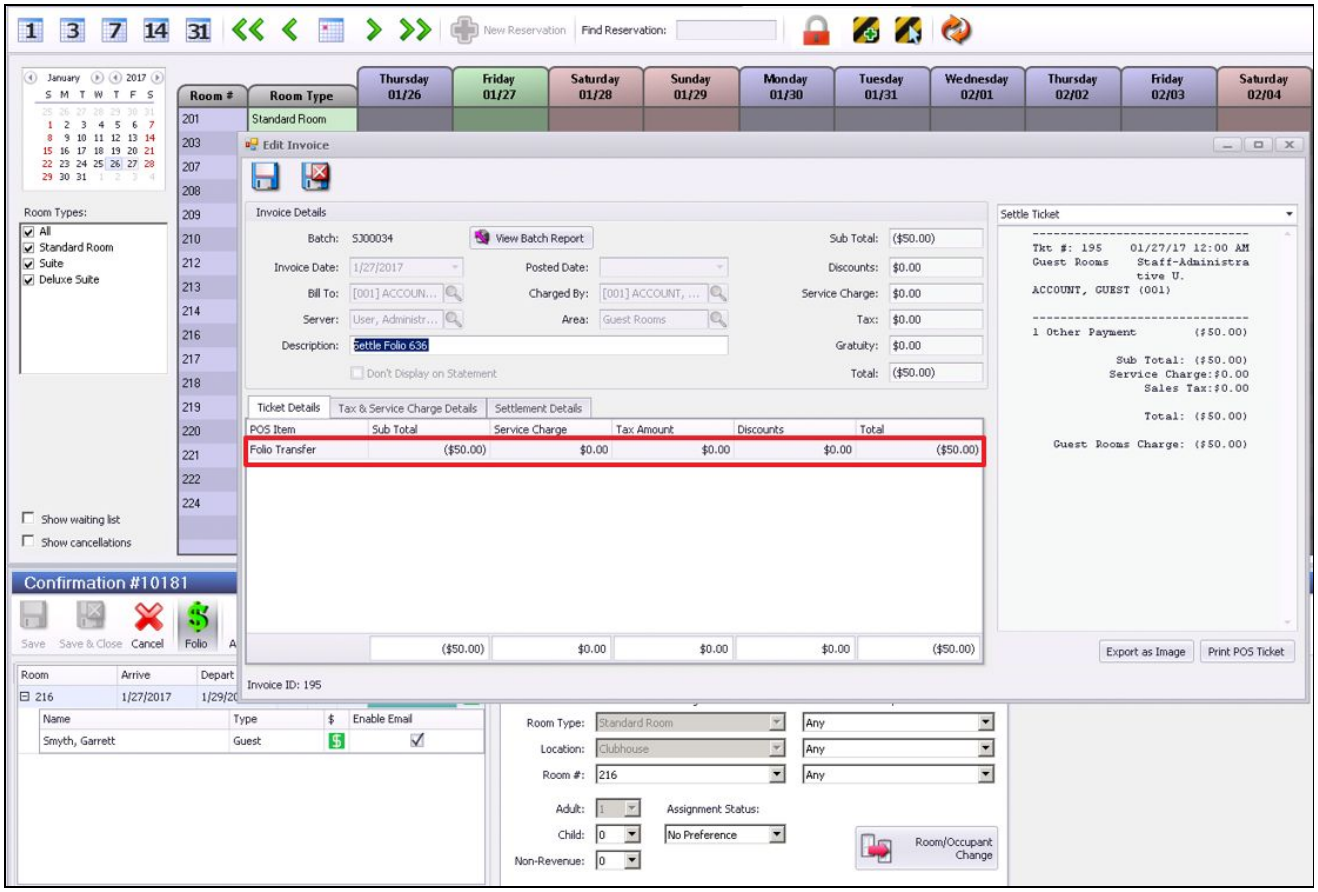
If yes, then the Credit Card on file will be charged. If no, a prompt will ask the User to swipe or manually enter information for another Credit Card, as seen below.

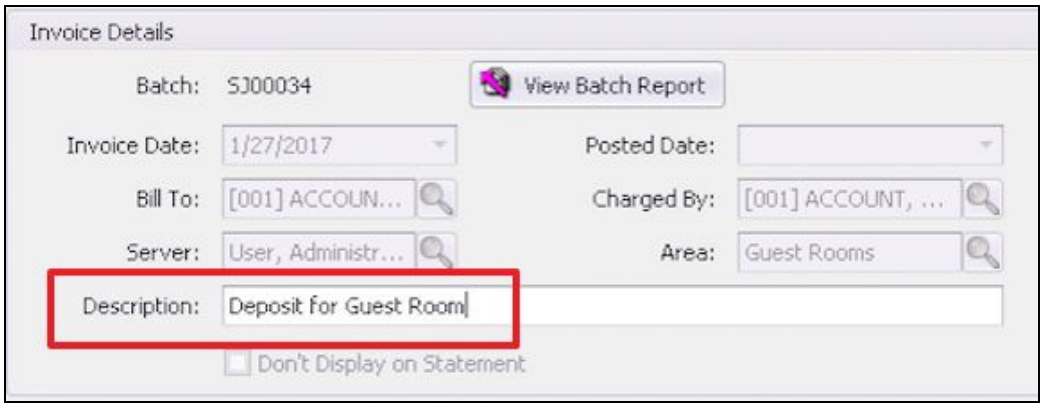


The deposit will now be reflected as a **credit** on the room Folio.

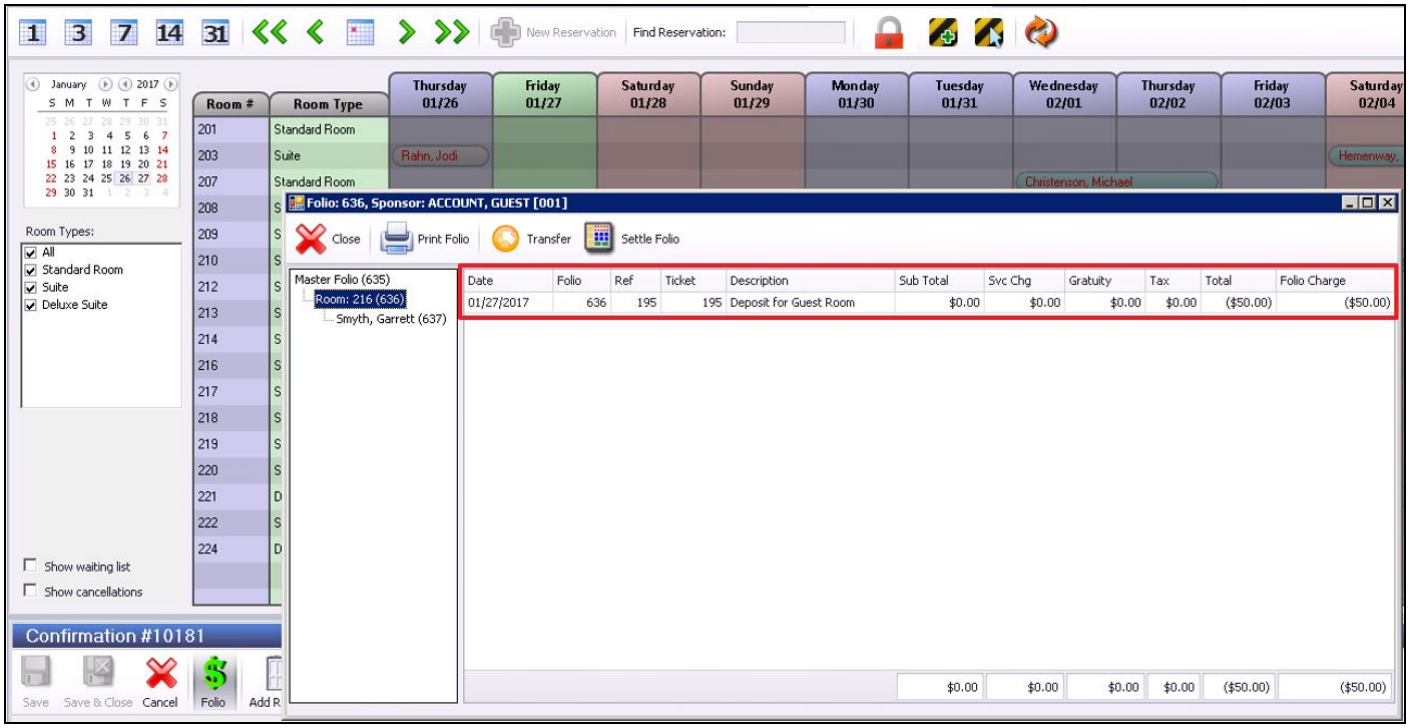


Double clicking the transaction row will allow for edits. From here the deposit **description** field can be changed to 'Deposit for Guest Room' or something similar.





Select **Save and Close** to save the information. The Deposit will now be listed as Deposit for Guest Room on the room Folio.


New Reservation
Find Reservation:
Room #
Room Type
Thursday 01/26
Friday 01/27
Saturday 01/28
Sunday 01/29
Monday 01/30
Tuesday 01/31
Wednesday 02/01
Thursday 02/02
Friday 02/03
Saturday 02/04
Rahn, Jodi
Christenson, Michael
Hemenway,
Room Types:
All
Standard Room
Suite
Deluxe Suite
Show waiting list
Show cancellations
Folio: 636, Sponsor: ACCOUNT, GUEST [001]
Close
Print Folio
Transfer
Settle Folio
Master Folio (635)
Room: 216 (636)
Smyth, Garrett (637)
Date
Folio
Ref
Ticket
Description
Sub Total
Svc Chg
Gratuity
Tax
Total
Folio Charge
01/27/2017
636
195
195
Deposit for Guest Room
$0.00
$0.00
$0.00
$0.00
($50.00)
($50.00)
Confirmation #10181
Save
Save & Close
Cancel
Folio