# **STS CLOUD – GROUP BOOKING ENTRY**



### TO ADD A NEW BOOKING:

Click the Toolbox icon in the top menu bar

Click the green +New Booking button

sts	₩ # # #+ *+ 0	Search	🎼 Rick Day – BAMPH by the Sea 👻 🛛 🗸
Completed Drafts 5 Search			+ New Booking

Lookup the Account Name, to see if an account exists in the database (type a few letters of the account name, and then click on the name from the drop down list.

If no Account exists, then you can add the new account - type in the account name

New Account Information – this will populate from an existing account, or if adding a new account, enter any info for this account

### New Contact Information:

If an existing account was selected, click Contact name to show the list of current contacts in the account, and highlight the correct contact.

If the contact is not listed, click New Contact, and enter the new contact details for this booking

If a new Account is being created, enter the new contact for this booking

Enter the name for the new boking

(If a multi property database, select the Property you are booking the group at)

Click Create Booking

New Booking					
Account Name	Enter new account name (or e	email address) or lookup existing	g by name, contact name, or em	ail address.	
NEW ACCOUNT INFORMATION					
Account Status	Active				
Market Segment	Please select				
Account Address	Address 1	Address 2			
	City	State	Zipcode	Country	]
	Website	Notes	]		
NEW CONTACT INFORMATION					
Contact	First Name	Last Name	Title	Phone	Email
Contact Address	Address 1	Address 2	]		
	City	State	Zipcode	Country	
Contact Social	LinkedIn	Twitter	]		
* Booking name					
	Give this booking a name.				
	Create Booking				

The new booking will open the Group screen – showing as a draft

# <u>STEP 1</u>:

Enter the Arrival Date

Enter the Departure Date

Select a Group Type:

- Rooms for rooms only bookings
- Catering for Catering/Meeting only bookings
- Rooms and Catering for a group with both lodging and catering/meeting
- (Note these are system defaults, and will turn on the tabs in the bookings to work with as appropriate to your group)

Select the Group Status:

• Prospect

- Tentative
- Definite

New Group Booking - American En	erprises Draft			Complete booking and move to prospect status
Arrival	Please Select Arrival	Group type	Please select	•
Departure	Please Select Departure	Status	Please select	•
Sales Person Catering Person	Rick Day N/A			

### **STEP 2**:

Address the Booking Auto Traces

Based on the Group Status selected, the Auto Traces related to the Group Status will appear on the next screen. (Auto Traces are derived from the Auto Traces in the Settings for the database)

NOTE: You must address traces to move forward with the data entry, by selecting the Blue Create To DO's button, or the Orange Don't Crate To Do's.

Review the traces noted. You can edit a trace date as needed or remove one that is not applicable.

Adjust the Date by clicking the date field in When, and you can also update the Assigned To User, by clicking the User name to select another user to send a trace to as needed.

If a trace is not needed, click the trashcan icon next to the trace.

Click either the Blue Create To Do's to save the traces to the assigned user's calendar, or the orange Don't Create To Dos'. If you click the orange button, note no traces will populate on any user calendar.

	iterprises					
Arrival	Friday, March 15, 20	124		Group type	Rooms and Catering	X ¥
Departure	Sunday, March 17, 2	2024		Status	Tentative	X ¥
Sales Person Catering Person	Rick Day N/A			Last Update By	03/09/2024, 11:06 AM Rick Day	
▲ The status of the booking	has changed; please cro	eate to-dos below.				
NOTES		WHEN	WITH		ASSIGNED TO	DELETE
NOTES Follow-up to Proposal		WHEN Wednesday, March 13, 2024	WITH		ASSIGNED TO Rick Day × ▼	DELETE
NOTES Follow-up to Proposal Contract Due Reminder		WHEN       Image: Constraint of the state of	WITH		ASSIGNED TO Rick Day × * Rick Day × *	DELETE

# <u>STEP 3</u>:

Begin filling in the data fields of information on the left. Each tab has fields for selecting and entering information that merge on contracts, resumes, and are used for future reporting. Start with the General Information tab, and work down the list to then finish and create your contract or BEO.

Booking	New Group Booking - American En	terprises
Saved	Arrival	Friday, March 15
BOOKING #1345600	Departure	Sunday March 1
General Information		Sunday, March
Dates	Sales Person	Rick Day
People	Catering Person	N/A
Rooms		
Functions/Catering		
Billing	* Event Name	New Group Booking - /
Payments		
Pickup	Account	American Enterprises
Activity/To-Dos		
Agreements/Documents	Market segments	× Corporate
Department Notes	Group code	
ACTIONS	ETA/ETD	Arrival
Make a Copy	2,2.0	
Print Booking Information	Event number	
Create Proposal		L
Show History		Repeat business?
Catering Taxes/Fees Breakdown		
Delete Booking	Contract type	Please select
	Calendar event type	In House Group

### **GENERAL INFORMATION TAB:**

Event Name - this is the Group Name as assigned when you created the group

Account - this is the account selected or created when the booking was built

Market Segment – required. This will inherit from the account, or if missing, click the field to select a market segment for this booking.

Group Code - this is a unique group identifier, typically used to relate to the hotel's PMS system.

ETA/ETD – Arrival Time and Departure Time (if desired)

Contract Type -optional, but most client leave this blank

Calendar Event Type – click the filed to select a custom Calendar Event type. This field will show the tentative and definite bookings on the Event calendar, for a visual view of the groups in house based on the arrival and departure dates. This is a custom client field and is derived from the Calendar Event Types within the Settings for the database.

Business Type – select if available from the list. If blank, then the field is not in use

Business Origin -- select if available from the list. If blank, then the field is not in use

Lead Source - select if available from the list. If blank, then the field is not in use

Meeting Class - select if available from the list. If blank, then the field is not in use

Revenue Classification - select if available from the list. If blank, then the field is not in use

RFP Number – optional

No Attrition – check this box if desired for a reference.

Breakfast included - check if applicable (this can be a merge field iin a document)

Breakfast up to – optional if need

Parking Included – optional if needed

Rebate Amount – enter the dollar amount (can merge in documents where called for)

Rebate Amount per - select either per Room or per Reservation (can merge in contracts)

Notes: These are general notes about the booking, or special concessions, etc. Notes input here can be merged in a document where needed

	✓ Repeat business?
Contract type	Please select
Calendar event type	Wedding
	Adding a calendar event type will put this booking on the event calendar
Business type	Wedding
Business origin	E Blast
Lead Source	Wedding Wire
Meeting class	Wedding
Revenue classification	Please select
Rfp number	

# DATES TAB:

Verify and update any dates on this tab. NOTE: Dates are required in ALL fields. If a date is not applicable to the group, leave it alone. Adjust dates based on the timing of the group booking relative to its arrival.

Note dates will auto populate from the system Settings for the database



# PEOPLE TAB:

Booking Contact - assigned when the booking was created - main contact

Onsite Contact(s): Can enter up to two names and phone numbers if needed, and these can merge into documents where needed

Salesperson - primary seller who created the booking

Catering Salesperson - optional if you have a counterpart who handles the catering for groups

Convention Services Person - optional, if you want to assign a person as this role

Commissionable - click the checkbox if applicable

Commissions Rate - enter the commission number

Booking Agent: Click the please select if needed. You will see accounts list to choose from. Account that list here are based on an Account being defined as a Booking Agent in the Account Settings.

NOTE: Accounts are defined for this field in the main account, and defining the Account Type) and a Booking Agent)

When a Booking Agent account is selected, it will then show a contact, allowing you to select a contact from that booking agency

Booking Agent IATA #: Input the IATA number as needed

Booking Contact	Jeffrey Allen		
Onsite Contact(s)	Contact Name	Contact Phone	Contact 2 Name
Sales Person	Rick Day		
Catering Person	Please select		
Convention Services Person	Please select		
Lead Source	Please select		
	Commissionable		
Commissions Rate			
Booking Agent	Please select		
	Booking agents are accounts with	n "Booking Agent" account t	ype.
Booking Agent IATA #			

Note: you can have up the three booking agencies linked within a booking.

### **ROOMS TAB:**

This tab is set to block your room types, denote the group rates, and establish the rooms to be held/blocked per day. Data entered here is merged into the group contract and is used to track all definite and tentative revenues for reporting.

Only the room types you use will appear on the group contract.

The default view for this grid shows one rate across all days – a flat rate across all days of stay. If you are selling a group rate on a per day basis by room type, click the Date Rate button to ON, and this will change the grid layout to allow a rate per day entry.

Flat Rate (for each room type you need per the booking):

RATE -Enter the room type rate – required.

QTY – input the number of rooms that the client wants or will be used on the contract. This is used for the Gross rooms on all reporting.

EXPECT – input a projected use or forecast (this entry is internal – clients do not see it). This is used for the Net rooms on all reports. Note it will default and reduce the QTY by 20% in most cases, but you can input the number you want here.

Input the rooms by day needed – LEAVE the last date blank, as this is the departure date.

NOTE: The rate and the day one Qty and Expect must be filled in. If a group is holding a Suite only for the second night, as an example, input a 0 in Qty and Expect on day one, and then a # of rooms on the second day)

# FLAT RATE:

						Daily rate Off	Pickup Complete Off
Room Type	Quick Actions	Rate	Fri Mar 15	Sat Mar 16	Sun Mar 17		
Minimum Rate		\$169.00	\$169.00	\$119.00			
Run of House	<u>Move</u> <u>Copy Across</u> <u>Clear</u>	\$ Rate	Qty Expect	Qty Expect	Qty Expect		
Suite	<u>Move</u> <u>Copy Across</u> <u>Clear</u>	\$ Rate	Qty Expect	Qty Expect	Qty Expect		
King	<u>Move</u> Copy Across Clear	\$ Rate	Qty Expect	Qty Expect	Qty Expect		

# RATE PER DAY - using the Daily Rate Tool when On

				Daily rate On Picku
Room Type	Quick Actions	Fri Mar 15	Sat Mar 16	Sun Mar 17
Minimum Rate	\$169.00	\$169.00	\$119.00	
Run of House	<u>Move</u> <u>Copy Across</u> <u>Clear</u>	Qty Expect \$ Rate	Qty Expect \$ Rate	Qty Expect \$ Rate
Suite	<u>Move</u> <u>Copy Across</u> <u>Clear</u>	Qty   Expect     \$ Rate	Qty   Expect     \$ Rate	Qty     Expect       \$ Rate
Kina	Move Copy Across	Qty Expect	Qty Expect	Qty Expect

You can click the copy across if a room pattern on day on this the same per day for the booking to save data entry time.

Clear will remove the entries for the rooms and allow you to easily re-input per day.

Click the green Save Changes button to save your blocked rooms.

Once saved, you will see the booking summary populated with the Gross and Net, used on all reporting.

Rooms	Gross	Net	Actual
Room nights	0	0	0
Room \$	0	0	0
ADR \$	0	0	0
Create Tentativ	d 03/0 e 03/0	9/2024 9/2024	

### FUNCTIONS/CATERING TAB:

This tab is used for all catering aspects of a group. This tab will:

- 1. Block your meeting spaces needed for the group functions/agenda
- 2. Project Catering revenues, in advance of menu selections, etc.
- 3. Open the Menu tools for the booking to select and add menus, notes for the BEO output and detail menus

### 1. BLOCKING THE MEETING ROOM(S)

\*\*Be sure you have already identified space availability, using the Function Diary (knife/fork icon in the top menu bar). This way you know what rooms to use and have confirmed space.

If you attempt to block a function room, and another booking already is holding a space, you will get a conflict message in red to denote the date the selected room was not available) – see example below.

Click Add a Meeting button on the date applicable to block the first room.

Enter a start time and an end time - you can type 8A or 815A and click the time for ease of entry

SU – Setup – enter the number of minutes prior to the start time entered – this creates a gray bar buffer on the function diary.

BD – Breakdown - enter the number of minutes after the end time entered – this creates a gray bar buffer on the function diary.

Function Type – you can type a letter, such as M for meeting and pick from pre-defined Function Types from the account settings, or custom type in this field as needed.

# Set For – enter the number of people for the function

Guarantee – optional at time of booking the room, if you want to show a different or same number as noted in the # St For column.

Setup – click to select the general setup of this room.

F&B Minimum – optional if used – input the F&B Minimum revenue if you use this. You can enter one flat amount for the entire booking, or distribute per day. Note if this field is used, it will populate where set up into a contract and provide a total of the F&B Minimum amounts.

Click the Save Changes button to accept the room

Repeat blocking rooms as needed for the agenda of the booking

3	Friday, March 15, 2024 Add a meeting View in Function Dia	ry								~
		Start	End	⊙ SU	() BD	Function Type	Room	# Set For	Guarantee	Setup
	⊕ @ ੴ ≡ ≭ ¶ ✓	8:00am	4:45pn	30	30	Meeting	Teak 🗸	125	122	Round

# 2. FORECAST CATERING REVENUE AND DEFINE ROOM RENTAL FEES

Click the Telescope Icon next to the meeting room blocked to enter a forecast sales and room rental fees

Once the icon is clicked the Forecast window opens. Input your forecast and room rental, and click save.

Room rental entered here prints on the group contract in the Schedule of events grid. All catering reports will use this entry for all future catering revenue values.

			FORE	CAST		
Arrival	Friday, Marc		Covers	Check	Revenue	
		Food		\$	\$	
Departure	Sunday, Mar	Beverage		\$	\$	
Sales Person Catering Person	Rick Day N/A	Room Rental		\$	\$	
		A/V		\$	\$	
		Labor		\$	\$	
Friday, March 5, 2024	24	Other		\$	\$	
Add a meeting when in Function Dial	Start End	Admin			\$	loom
+ = () = 1 1	8:00an 4:45pr	Save				Took

Once populated, you will see the Catering Forecast in the Booking summary on the left

Open Plan	ner Dashb	oard 🗹			
looking Summary					
Rooms	Gross	Net	Actual		
Room nights	0	0	0		
Room \$	0	0	0		
ADR \$	0	0	0		
Catering	Fore	ast	Actual		
Food \$		500	0		
Rental \$		500	0		
Total \$	1,	000	0		
Created Tentative	03/09/20 03/09/20	)24 )24			

### 3. DETAILING CATERING EVENTS

See Catering Detailing Addendum to address creating the menu items and notes that are used for your BEO, and to input changes and items when detailing your events. All detailing will occur in this area.

All menu item selections and BEO notes are input using the Knife/Fork icon to open the booking into the Catering tool.



ROOM CONFLICT MESSAGE: If you attempt to block a function room, and another booking already is holding a space, you will get a conflict message in red to denote the date the selected room was not available)

ng ments kup ivity/To-Dos reements/Documents partment Notes	Functions marked in Friday, March 15, 2024, 13 Friday, March 15, 2024	red below requ 345600-237681	ire attention. 8   Meeting, a	The mee 8:00am -	eting room ha 4:45pm (0)	s not been specified,	or is in conflict with	n another existi	ng functior	l.
CTIONS 1ake a Copy	Add a meeting View in Function	Start	End	⊙ SU	S BD	Function Type	Room	#	Set For	Guarantee
t Booking Information ate Proposal	+ @ @ ≡ ≭ ¶ ∨	8:00am	4:45pn	30	30	Meeting		<b>∨</b> 1	25	122

### **BILLING TAB:**

Billing contains information relative to the group and is used both in merge contracts when setup or within the group resume. It is good practice to populate this data, so it can be used when copying a booking to new dates, etc., and create more robust merged resumes.

### Reservations:

Select the Reservation method, and applicable who is paying for what charge.

### Deposit:

Select a date and input a dollar amount for deposits here. This will create a schedule, print where denoted to merge in a contract/resume, and is used in the deposits reporting.

If you are setting a date and amount, whether one initial date, or multiple, link these to your to do calendar. Under Activity Type for To Do's, click please select and choose Deposit Due or your appropriate activity type. Click Save Changes

Selecting the activity type will send to do's to your login dashboard for reminders about deposit.

Fees/Taxes:

Utilize as needed to define fees, etc. for resume and contract merges where setup.

Exempt from: check the appropriate boxes. Note if checked this will suppress tax calculation in catering charges.

General Info:

Input or use selected fields, again for impacting merges on resumes and contract document use.

RESERVATIONS		FEES AND TAXES	
Reservation method	Please select 🔹	Baggage fee	S Please ▼
Room/Tax	Master Individual	Parking fee	\$
Incidentals	Master Individual	Housing/resort fee	S
Meals	Master Individual	Credit card fee	
Catering	Master Individual	Tax exempt number	l
Resort Fee	Master Individual	Exempt from	State Sales Tax F&B Tax
DEPOSIT		GENERAL INFO	
Deposit Due		Payment method	Please select
Deposit amount	\$	House account number	
2nd Deposit Due		Master account number	
Deposit 2 amount	S	Comp policy	
3rd Deposit Due		Authorized signatures	
Deposit 3 amount	S		
Final Payment Due	<b>*</b>	Estimated contract value	S
Final payment amount	S		
Deposit note			
Activity type for to-dos	Please select         •           If you want to-dos created from the deposit schedule.         •		

# **PAYMENTS TAB:**

Log processed advance deposits or payments you receive on this tab. Note payments noted here would be posted into your PMS or POS systems, as STS Cloud is not a payment processing system. The info entered here will impact the deposits report and show as payments received on the group's main overall balance due page of the Complete banquet check.

You can post multiple payments to this tab as well.

If you want to issue a receipt, please use, under Actions - Print Booking Information, and select Booking Payment to save a receipt of the amount of the payment posted to send a client.

Enter a new payment	
Payment date	Please Select
Payment method	Please select
* Amount	S
Person making payment	
Check/CC Number	
	For security reasons, please DO NOT enter a complete credit number here. Use as a reference (e.g. last 4 digits) only.
Cc type	Please select
Comments	
	Save payment

### **PICKUP TAB:**

This is used to document the actual room nights and ADR from the group and is used in all reports as the Actuals for reporting.

You can input by room type or choose to enter the overall pickup and ADR of the booking, based on your actual data used.

Select hotels with PMS integrations may have pickup synced from their PMS interfaces in this tab.

				Copy pickup from room block Daily rate Off Pickup Complete Off
Room Type	e Rate	Fri Mar 15	Sat Mar 16	Sun Mar 17
Run of House	\$ Rate	Pickup	Pickup	Pickup
Suite	\$ Rate	Pickup	Pickup	Pickup
King	\$ Rate	Pickup	Pickup	Pickup
Double Double	\$ Rate	Pickup	Pickup	Pickup

Note you can input a variable rate per day as needed, by turning the Daily Rate button, to allow a room and rate per day entry on this tab.

You can use the Pickup Complete button, and turn that on, for a visual reminder pickup is done and finalized, and will be noted when running the Groups on the Books Report.

# ACTIVITY/TO DO's TAB:

Each booking has this tab, housing the To Do's created with the status changes of the booking, and allow users to input added activities as needed for a group. Similar to logging a sales activity in an account, you can add any calls here.

You can also upload and store documents into each booking in this tab, using the What – See Attached File – activity type. Uploading and storing files here stay with booking and is ideal for copies of signed agreement, rooming lists, etc.

To upload a file:

When - leave as Right Now

- Who-Your user
- What click and select See Attached File
- With leave as the booking contact
- Notes enter a document reference note for your team (IE Rooming list)

Click the Choose File button

Select and locate the file you want from your computer

**Click Create Activity** 

Once saved, you will see a Document icon with the filename in the Activity history on this tab. Click the icon to open the document online.

Catering laxes/hees	Breakdow	n					
Delete Booking						Left voicemail Sent Proposal Called and left a voicemail will call back	
Planner Dashboard					Attachment	Choose File No file chosen	
Open Plan	ner Dashb	oard			Follow-up	None None	
Booking Summary						Create Activity	
,							
Rooms	Gross	Net	Actual				
Room nights	0	0	0	Activity			
Room \$	0	0	0				
ADR \$	0	0	0	Mar 9		See Attached File by Rick Day, BAMPH by the Sea with Jeffrey Allen, American Enterprises	
Created Tentative	03/09/20	24 24				Creating Activities - Sales Calls - Traces - Future Reminders.pdf	
						Rew Group Booking - American Enterprises	
American Enterprise	;		<b>B</b> /			Copy of Rooming List	

### **DEPARTMENT NOTES TAB:**

This tab provides notes fields for your operating departments, and lets you specify services, special request, requirements, etc. for this booking.

The notes typed here will print into the Group Resume for your team.

Default department notes can be set up in the Settings for the database, so fields auto populate with standard text as needed for each booking.

Update an add any notes as relative to the group and your needs and click Save changes.

2	
Contract	
Sales Office	
Front Desk	Expected arrival period: Group will provide Welcome gifts for their arrivals? Y N
Bellmen	
Food and Beverage	
Reservations	

# AGREEMENTS / DOCUMENTS:

With the group details defined, rooms blocked, and catering spaces blocked and forecasted, you are ready to create your group contract, a BEO, resume or Banquet Check within this tab.

Your merge templates will appear here to select the correct document you need, generate a client output copy, or for contracts, allow for edits to the document for just the booking you are working on.

Documents and edits are retained within the booking for future use and reference as well.

From your document list, select the contract template you want to use for the group.

If you just want to create the client output contract with no edits, click the Open PDF button. This will merge the group input into the template directly.

When the document tab opens you can then save a copy from the browser to your computer as needed.

SELECT FOR E-SIG	ON PLANNER DASHBOARD	TITLE	ACTIONS
		BEO - Menu on Left	Open PDF I Open Function PDF View/Modify
		BEO - Menu on Right	Open PDF I Open Function PDF View/Modify
		BEO with Package Pricing - Menu on Left	Open PDF I Open Function PDF View/Modify
		Catering Function Contract	Open PDF 🖌 View/Modify
		Combined BEO Daily Events	Open PDF // View/Modify
		Group Contract - 8/2023	Open PDF // View/Modify
		Group Rooms Only Contract	Open PDF // View/Modify
		Meeting Table Examples	Open PDF // View/Modify
		Room with Functions Agreement	Open PDF // View/Modify
		STS Group Resume	Open PDF // View/Modify
		Credit Card Authorization Form	
		Banquet Check	Complete Banquet Check B Banquet Check By Function

Send selected for e-signature

# EDITING A CONTRACT PRIOR TO FINAL OUTPUT:

To edit a contract for just the booking you are in, click the View/Modify button next to the contract you need.

When the edit window opens, you can move and scroll in the document, and update or edit text as needed. Use the bold, underline, etc. buttons as well, highlighting the text in the document and click the button to change the font style.

रे 💼 New Grou	p Booking - America	n Enterpris	ses / (	Group	Contrac	:t - 8/20	23																
<	Paragraph	~	в	Ι	Ū.	<u>A</u> ~	<u>×</u> ~	=	Ξ	Ξ	≡	i≡	~ 1	 ⊒ ;	Ē	Η	<u></u> ×	⊞~	Q	9	S:	经	<>
	BAMPH by the Sea																						
Date: March	n 9, 2024																G	ROUP	SALES	AGR	EEME	NT	
COMPANY:					Ameri	ican E	nterpris	es															
GROUP NA	ME:				New Group Booking - American Enterprises									HO	TEL:								
CONTACT					Jeffrey Allen							HOTEL CONTACT:											

ADDRESS:: 1685 Mountain Court ADDRESS:

Once edits are completed, scroll to the bottom and click the Save button.

You will see a note indicating the selected document has been modified.

Click Open PDF for the document output, with your saved changes.

You can save the document to your computer to send, or use E-signature, if a selected module in STS Cloud to send for electronic signing.

NOTE: it is not recommended to use View/Modify on a BEO document. All edits for a BEO should be made in the Function/Catering tab of the group, as BEO details change frequently.

### **RE-MERGE BUTTON:**

Once you use View Modify and save document changes, you will see an Orange Re-merge button. The Re-Merge button will basically re-set the document to its original settings, and remove any custom changes to the document made previously. This may be necessary when a client makes major changes to their booking, such as date of arrival, adding additional function spaces to their agenda, changes booking contacts, etc.

	 	DEO WILL FRENAYE FILLING - WELL OF LET	a open rol 11 open rol cuon PDF V a view/woony
3		Catering Function Contract	🖪 Open PDF 🥒 View/Modify
		Combined BEO Daily Events	🖪 Open PDF 🕜 View/Modify
		Group Contract - 8/2023 Updated today at 2:19 PM	Copen PDF View/Modify  Cocument modified! To overwrite and start over -  Re-Merge
		Group Rooms Only Contract	■ Open PDF View/Modify
-		Meeting Table Examples	Open PDF View/Modify
		Room with Functions Agreement	■ Open PDF View/Modify

## PLANNER DASHBOARD:

Rather than download and save and upload files to email, you can use the Planner Dashboard feature. This will allow you to select the documents to use On Planner Dashboard, and then send a simple link to the client. The client will then see a standard booking information page, with link to view and download their documents, without using file attachments,

Select the documents to send to the client in the On Planner Dashboard column

Click the blue Open Planner Dashboard button on the left

Functions/Catering			
Billing	SELECT	ON	
Payments	E-SIG	DASHBOARD	TITLE
Pickup			PEO. Manu an Left
Activity/To-Dos	0	U	BEO - Mend on Cert
Agreements/Documents			BEO - Menu on Right
Department Notes		0	BEO with Package Pricing - Menu on Left
ACTIONS			Catering Function Contract
Make a Copy			Combined BEO Daily Events
Print Booking Information		-	
Create Proposal	U		Group Contract - 8/2023
Show History	0		Group Rooms Only Contract
Catering Taxes/Fees Breakdown			
Delete Booking			Meeting Table Examples
			Room with Functions Agreement
Planner Dashboard			STS Group Resume
Open Planner Dashboard 🗗			Credit Card Authorization Form
			Banquet Check
hadden Communi			

Click the Copy link to share Planner Dashboard button in the purple user instruction block.

Paste this link into your email

When the client opens this link, they will see the standard booking document, with link to their files (they will note see the purple instruction block).

A client can then share this link with others as needed.

Planner Dashboard – Preview The Planner Dashboard is a link to share with your clients. It I	ooks exactly like this page (except for this message). Add documents to share from the Agreements/Documents step	of the booking, and use the button to	the right to copy the link to share with your clients.	Copy link to share Planner Dashboard
	BAMPH by the Sea New Group Booking - American Enterprises March 15-17, 2024		/	
	Documents Combined BEO Daily Events Last updated on Saturday, March 9, 2024	Open PDF	Contacts Sales Manager	
	Group Contract - 8/2023 Last updated on Saturday, March 9, 2024	Open PDF	Rick Day President 118 N. Division Street, Ste 204 Salisbury, MD 21801	