Execu/Tech Systems, Inc.

Catering and Event Management

Getting Started Guide

Catering & Event Management

This system integrates your group profile; group reservations; group deposits; automatic posting of event charges; group events; menu planning; meeting/banquet room rental; event setup; Banquet Event Orders; Contracts; Event Checks; and more. You move easily from one screen to the next without having to exit to a master menu. Master folios are created automatically. Deposits and charges can be posted right from the Catering & Events Management screen. Everything is designed to run seamlessly through Execu/Suite™. However, this system can integrate to Execu/Touch™ Point of Sale as an alternative approach.

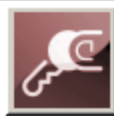|		
Weddings	Reunions	Receptions
Conferences	Meetings	Luncheons
Education	Government	Corporate
Family	Church	Civic

Control Files Setup

- ## Execu/Suite™ (Hotel™) Control Files
  - Meeting Room Parameters
  - Conference/Meeting/Banquet Room Type
  - Conference/Meeting/Banquet Rooms
  - Charge Codes
  - Payment Codes
  - Market Segment Codes, Sources of Business
  - Profile Parameters

- ## Catering/Event Control Files
  - Departments
  - Categories
  - Items

- ## City Ledger/Direct Bill Customers (Optional)
  - Customer Setup

File   Reservations Menu   Front Desk   Sales   Night Audit   **Manager/Setup**   Direct Bill   Condo   Back Office   Food and Beverage/ Retail   Time and Attendance   System Maintenance   Help

Hotel Control Files Set-up
Print Guest Trial Balance
Print Guest Aged Report (30-60-90-120)
Print Charge/ Payment/ Misc. Codes
Print Charge Codes in AM Report Sequence
Travel Agency Set-up
Print Travel Agency Reports
Print Travel Agency Checks
Adjust Night Audit Statistics
Activity Logs

People/Profile   Reservations   Rooms   Room Types   Check Out   Instant House Count   Housekeeping   Clock in/out

Select Hotel Control Files Set-up

- Reservations Menu
- Front Desk
- Sales
- Night Audit
- Manager/Setup
  - Hotel Control Files Set-up
  - Print Guest Trial Balance
  - Print Guest Aged Report (30-60
  - Print Charge/ Payment/ Misc. (
  - Print Charge Codes in AM Rep
  - Travel Agency Set-up
  - Print Travel Agency Reports
  - Print Travel Agency Checks
  - Adjust Night Audit Statistics
  - Activity Logs
- Direct Bill
- Condo
- Back Office
- Food and Beverage/ Retail
- Time and Attendance
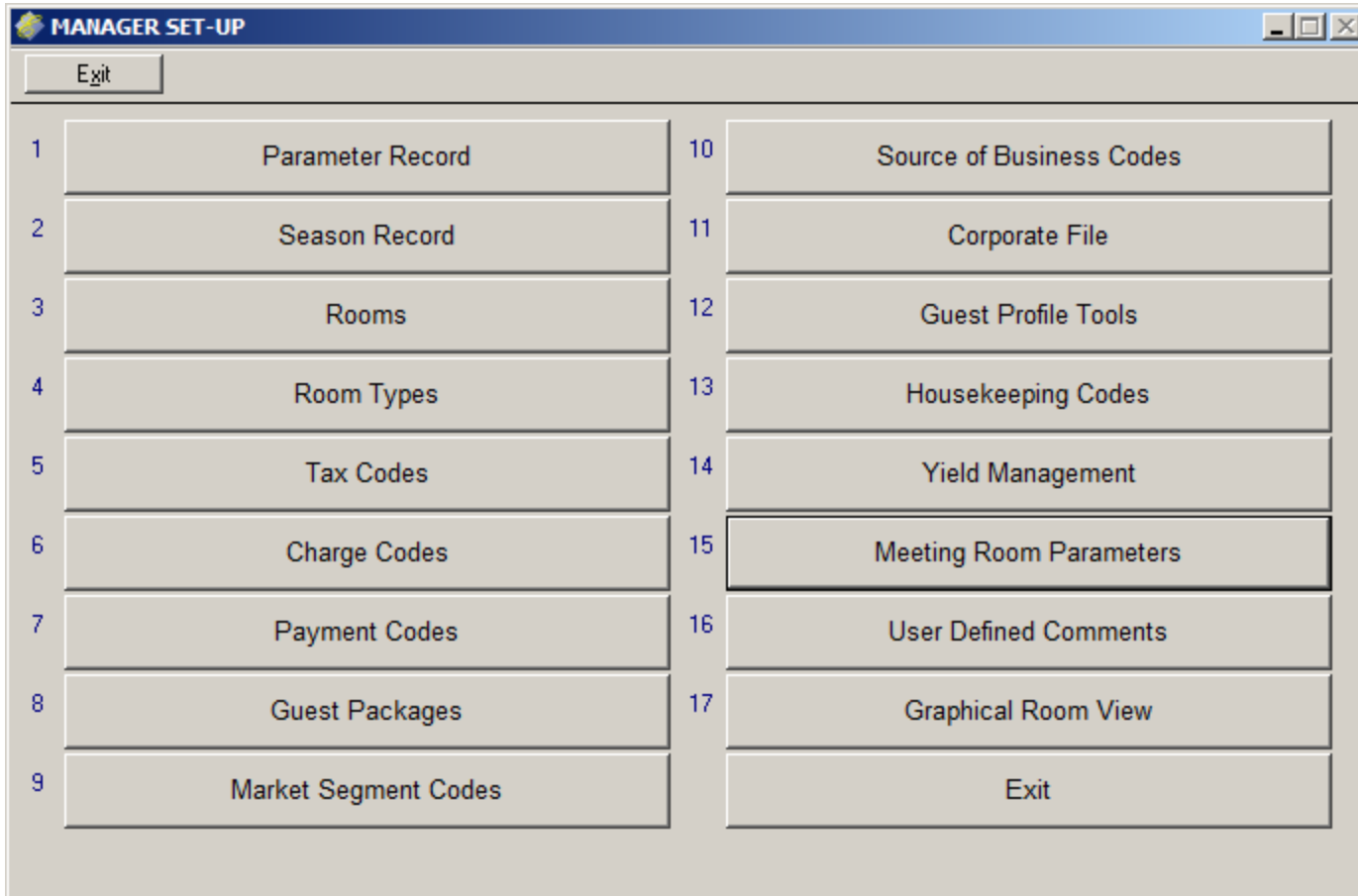- System Maintenance
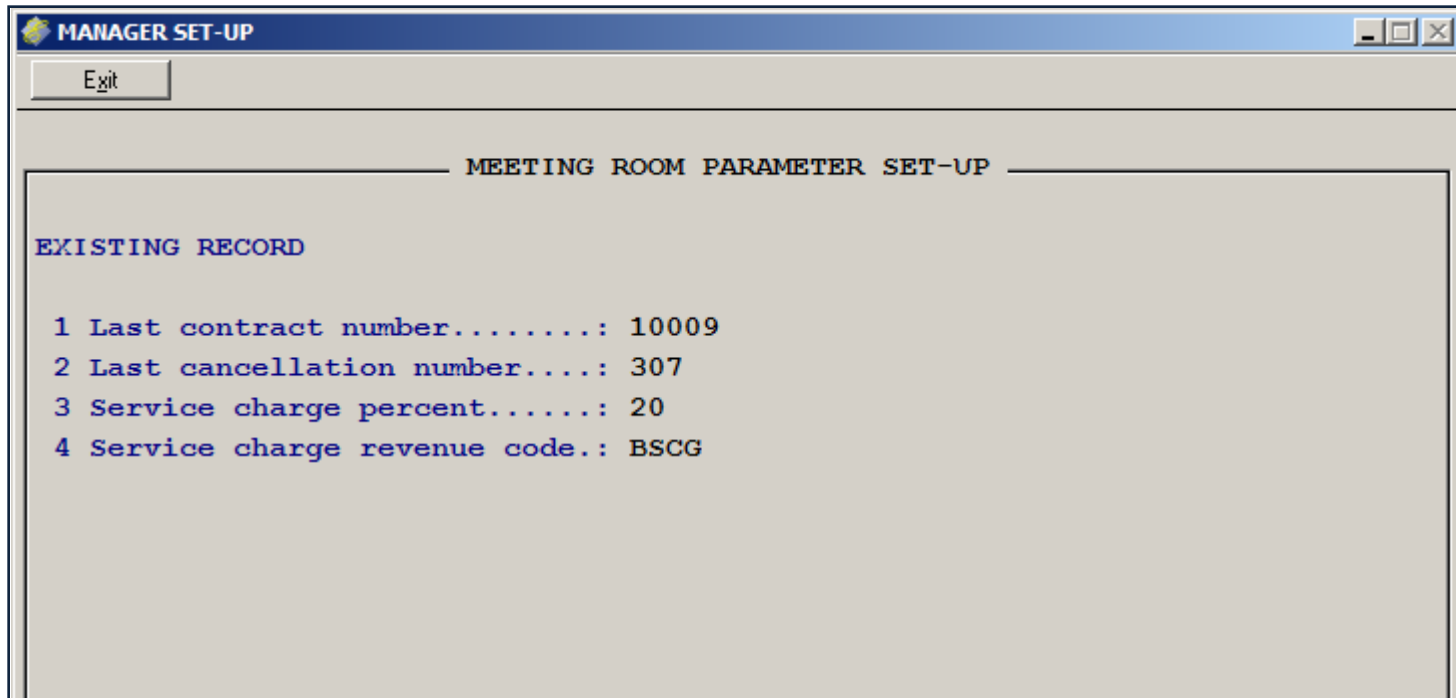
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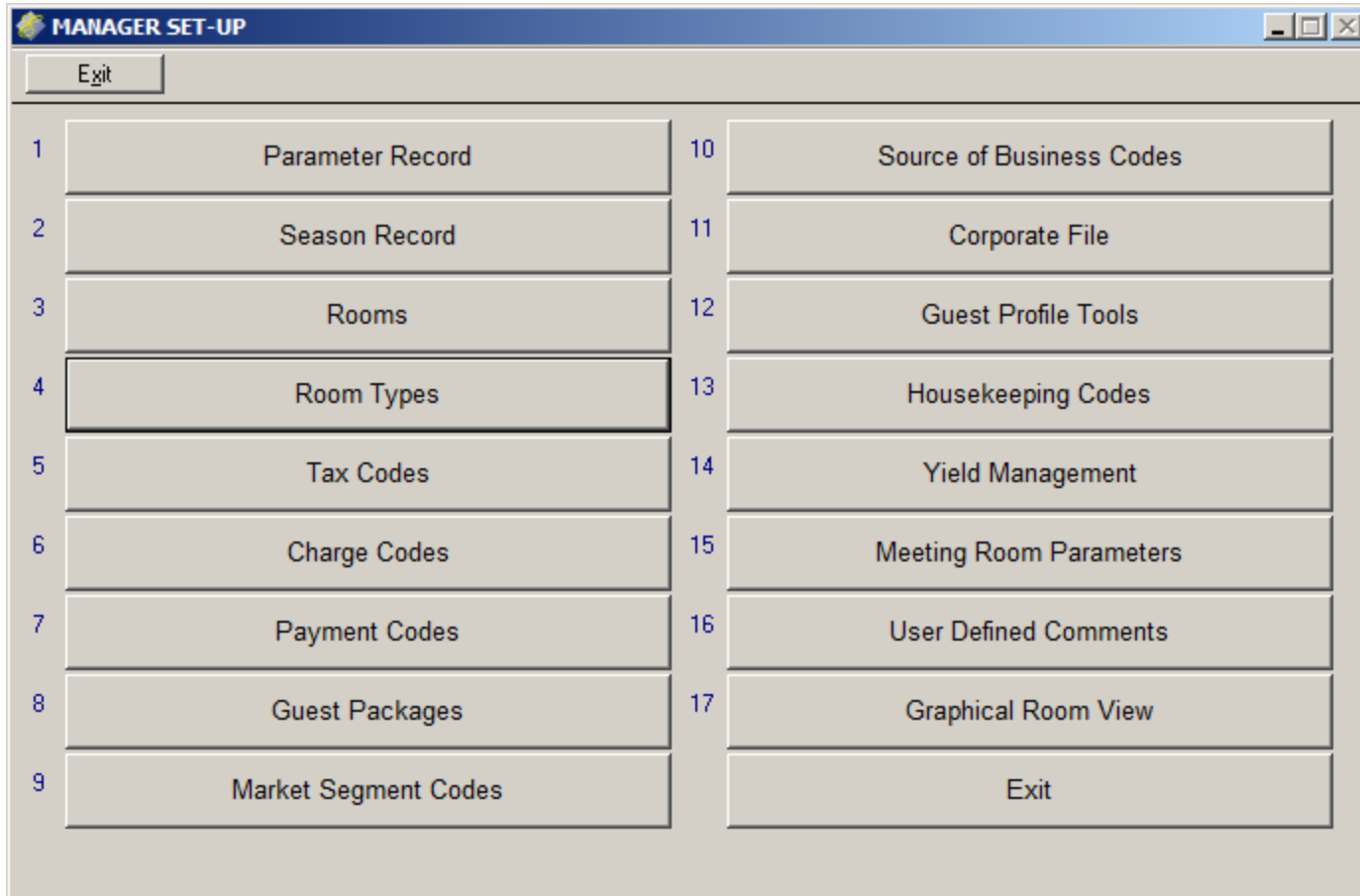
Execu/Tech Home

Getting Started:

- Remember to keep your CAPS LOCK on.
- You need a default printer on your computer. When the Page Setup scree Enter or click Ok.
- Below the master menu you'll see icons that will take you into the program They are grouped by type, such as reservations, front desk, and miscellan
- To escape a screen, press <Esc> on your keyboard or click "Cancel". Mo quick escape, to avoid losing data.
- You can multi-task by minimizing the current screen and opening another. screen, click the appropriate bar in your taskbar at the bottom of your com
- Enter dates as MMDDYY. For example, enter October 21, 2009 as 10210
- When you're finished, go to File > Exit Execu/Tech.

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Select "Meeting Room Parameters"

MANAGER SET-UP

Exit

MEETING ROOM PARAMETER SET-UP

EXISTING RECORD

```
1 Last contract number........: 10009
2 Last cancellation number....: 307
3 Service charge percent......: 20
4 Service charge revenue code.: BSCG
```

1. To set your beginning Contract Number, enter your last contract number. The next contract will have the next sequential number.
2. To set your beginning cancellation number, enter your last cancellation number. The next cancellation will have the next sequential number.
3. Enter the percentage amount of automatic service charge or gratuity. For example, enter 20 for 20 percent.
4. Enter the Hotel / Execu/Suite charge code for the service charge or gratuity.

MANAGER SET-UP

Exit

1	Parameter Record	10	Source of Business Codes
2	Season Record	11	Corporate File
3	Rooms	12	Guest Profile Tools
4	Room Types	13	Housekeeping Codes
5	Tax Codes	14	Yield Management
6	Charge Codes	15	Meeting Room Parameters
7	Payment Codes	16	User Defined Comments
8	Guest Packages	17	Graphical Room View
9	Market Segment Codes		Exit

Select "Room Types"

Room Type Setup

Exit

Existing Room Type

Room type: CONF   Description: MEETING/BANQUET ROOM

Rates

	High	Rack	Discount 1	Discount 2	Discount 3
Single person:	.00	.00	.00	.00	.00
Multiple persons:	.00	.00	.00	.00	.00
Extra persons:	.00	.00	.00	.00	.00

Weekend (+/-): .00   .00   .00   .00   .00

Weekly Rate: .00   Monthly Rate: .00

Number of Rooms: 5   Room rate 'Multiple persons' number (default 2): 0

Central Res'v Code: Maximum number of persons: 0
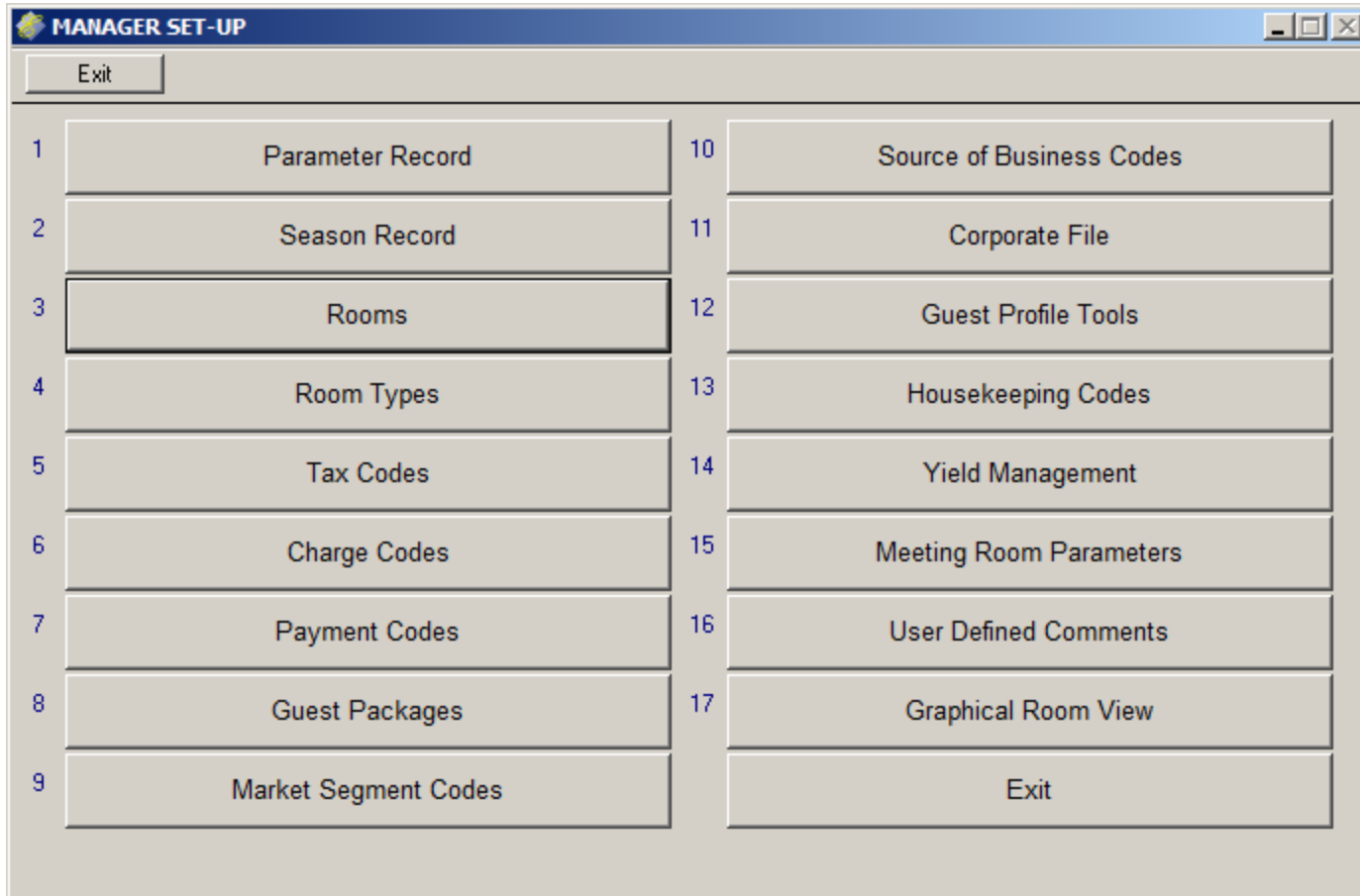
Include in Count?: N

Default Market Segment:

Default Source of Business:

Comment:

Save   Delete   Season Rates   Notes   Print Screen   Update room prices

Room type MUST be CONF. Rates and other fields are optional. You may use Notes to add information if you wish.
Set "Include in Count?" to N of you do not want this room type included in your guest room type availability chart.

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MANAGER SET-UP

1 Parameter Record	10 Source of Business Codes
2 Season Record	11 Corporate File
3 Rooms	12 Guest Profile Tools
4 Room Types	13 Housekeeping Codes
5 Tax Codes	14 Yield Management
6 Charge Codes	15 Meeting Room Parameters
7 Payment Codes	16 User Defined Comments
8 Guest Packages	17 Graphical Room View
9 Market Segment Codes	Exit

Next, select "Rooms".

Room Setup

Exit

Existing Room

Room number: 901 ▼   Description: NORTH BALLROOM

Rates

	High	Rack	Discount 1	Discount 2	Discount 3
Single person:	.00	.00	.00	.00	.00
Multiple persons:	.00	.00	.00	.00	.00
Extra persons:	.00	.00	.00	.00	.00

Weekend (+/-): .00   .00   .00   .00   .00

Weekly Rate: _____   Monthly Rate: .00

Room type: CONF   Room rate 'Multiple persons' number (default 2): ____

Room Status: VC   Include in Count?: N

Comment: ____   Optional Revenue Charge Code: ____

Maid Station: 0   **Connecting Rooms**   1. ____   3. ____

Search Priority: 50   Room Nights Used: 0   2. ____   4. ____

Save   Delete   Season Rates   Notes   Print Screen

Enter a room number up to four characters. It may be alpha or numeric. Enter a description. Rates will be entered when the room is scheduled. The room type MUST be CONF. Answer N to "Include in Count" if you don't' want this room to be included on your availability tape chart.   The other fields can be left as is.

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MANAGER SET-UP

Exit

1	Parameter Record	10	Source of Business Codes
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7	Payment Codes	16	User Defined Comments
8	Guest Packages	17	Graphical Room View
9	Market Segment Codes		Exit
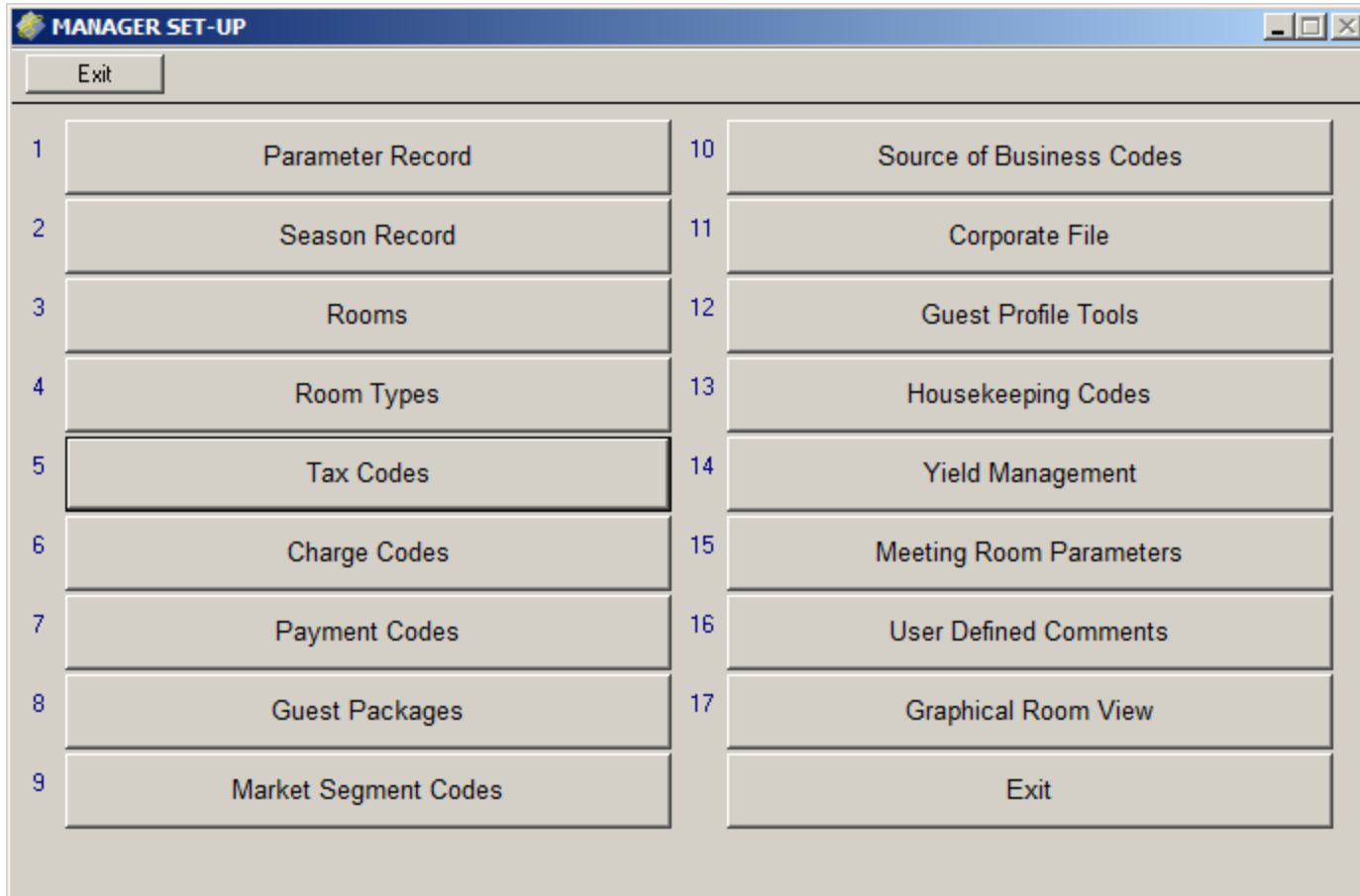
Next, select Tax Codes. Each taxable event item and meeting room must have a tax code.

TAX CODE SET-UP

Exit

EXISTING TAX CODE

Enter tax code: ST1 🔍 < >

1. Description: STATE SALES TAX
2. Tax Percent: 4.00
3. Stop room tax after?: 0   4. (D)ays, (M)onths:
5. Tax on tax?:
6. Tax limit: .00
7. Per folio/person:

Tax codes must be set up for taxable event items. Each item can have one tax code . You can have multiple codes if you have more than one tax entity. Each tax code MUST begin with ST, including tax on your meeting or banquet rooms. You might use ST1, ST2, ST3, ST4, etc., applying each to the appropriate event item. You DO NOT set up your service charge here.

Yes   Cancel   Delete

MANAGER SET-UP

Exit

1	Parameter Record	10	Source of Business Codes
2	Season Record	11	Corporate File
3	Rooms	12	Guest Profile Tools
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8	Guest Packages	17	Graphical Room View
9	Market Segment Codes		Exit

Next, select Charge Codes. Each chargeable event item, including taxes and service charge, must have a charge code. You set up these codes in the same way you set up your other charge codes.

Exit

NEW CHARGE

Enter charge code: ST1 🔍 < >

1. Description: STATE SALES TAX
2. Gen ledger acct -DR:
3. Gen ledger acct -CR:
4. G/L Journal Code:
5. Fixed amount: .00
6. Tax codes:
7. AM Report line no: 740
8. AM Rep Format(opt):
10. Print items?: Y
11. Display item?: Y
12. Allow comment entry?: Y
13. Include in deposit?:
14. Auto post? (Y/N):
15. Tax exempt codes-opt:
16. Optional usage code:

| Yes | Cancel | Delete | Tax Codes |

When you set up the charge code for your taxes, do not fill in field 6.

CHARGE CODE SET-UP

Exit

NEW CHARGE

Enter charge code: BFOO

1.	Description:	BANQUET FOOD
2.	Gen ledger acct -DR:	
3.	Gen ledger acct -CR:	
4.	G/L Journal Code:	
5.	Fixed amount:	.00
6.	Tax codes:	ST1
7.	AM Report line no:	720
8.	AM Rep Format(opt):	
10.	Print items?:	Y
11.	Display item?:	Y
12.	Allow comment entry?:	
13.	Include in deposit?:	
14.	Auto post? (Y/N):	
15.	Tax exempt codes-opt:	
16.	Optional usage code:	

Yes   Cancel   Delete   Tax Codes

For a taxable item you need to put the appropriate tax code in Field 6.

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CHARGE CODE SET-UP

Exit

NEW CHARGE

Enter charge code: BROO [🔍] [<] [>]

1. Description: BANQUET/EVENT ROOM
2. Gen ledger acct -DR:
3. Gen ledger acct -CR:
4. G/L Journal Code:
5. Fixed amount: .00
6. Tax codes: ST2
7. AM Report line no: 710
8. AM Rep Format(opt):
10. Print items?: Y
11. Display item?: Y
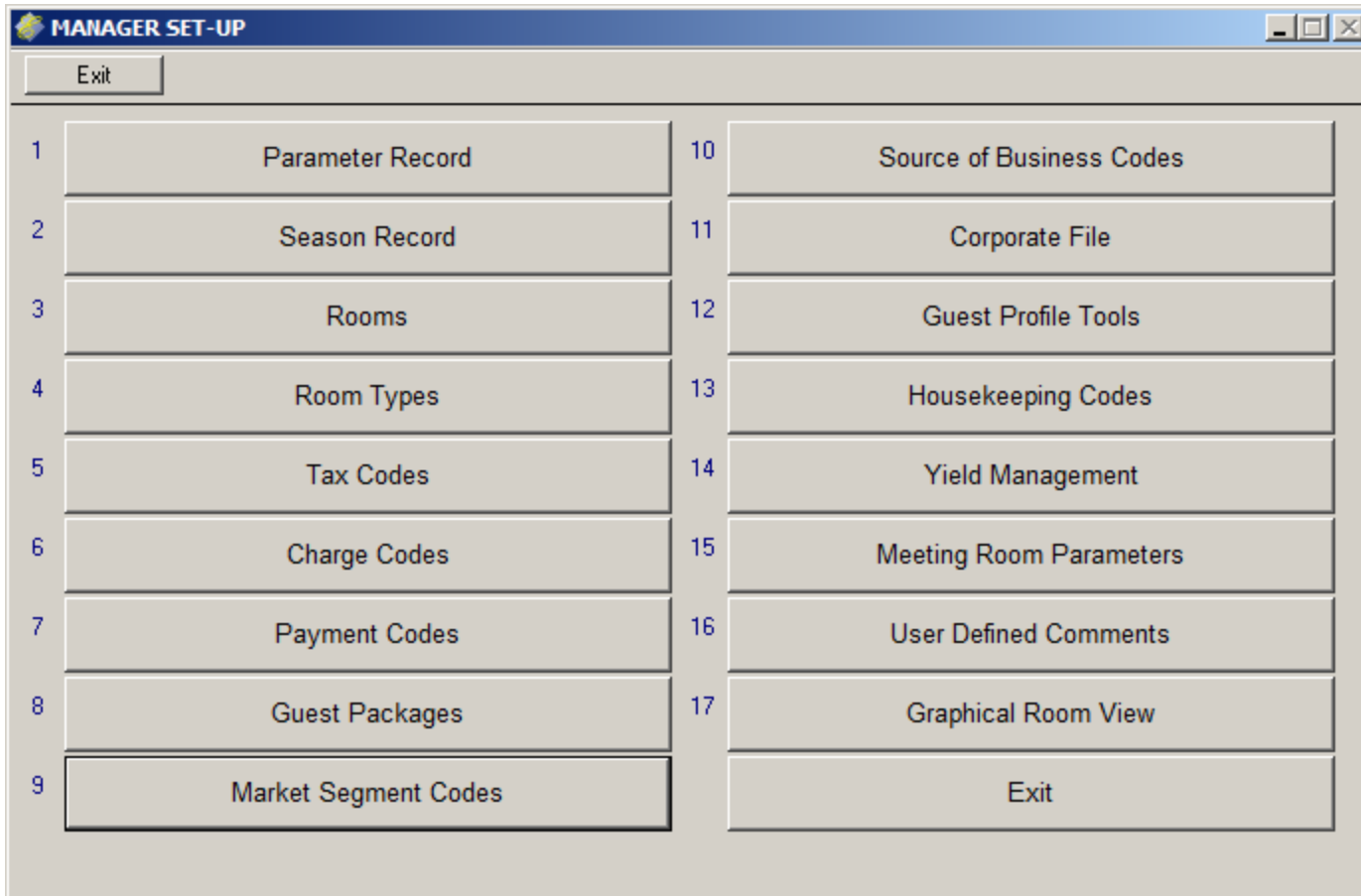12. Allow comment entry?:
13. Include in deposit?:
14. Auto post? (Y/N):
15. Tax exempt codes-opt:
16. Optional usage code:

[Yes]   [Cancel]   [Delete]   [Tax Codes]

Since your meeting/banquet rooms will be charged through the event rather than at night audit when you post guest room charges, your meeting room charge code SHOULD NOT begin with RC. Your tax should not begin with RT but rather should begin with ST.

CHARGE CODE SET-UP

Exit

NEW CHARGE

Enter charge code: BSCG

#	Field	Value
1.	Description:	SERVICE CHARGE
2.	Gen ledger acct -DR:	
3.	Gen ledger acct -CR:	
4.	G/L Journal Code:	
5.	Fixed amount:	.00
6.	Tax codes:	
7.	AM Report line no:	775
8.	AM Rep Format(opt):	
10.	Print items?:	Y
11.	Display item?:	Y
12.	Allow comment entry?:	
13.	Include in deposit?:	
14.	Auto post? (Y/N):	
15.	Tax exempt codes-opt:	
16.	Optional usage code:	

Yes   Cancel   Delete   Tax Codes

You need a charge code for your service charge. This code must match the code you entered in the Meeting Rooms Parameters section of the Manager/Setup Control Files. Enter a tax code in Field 6 ONLY if your service charge is taxed.

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MANAGER SET-UP

Exit

1 Parameter Record	10 Source of Business Codes
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You can set up Market Segment Codes and Source of Business Codes for your events and events guests if you wish.

MARKET SEGMENT CODE SET-UP

Exit

NEW MARKET SEGMENT

Market segment code: CONF
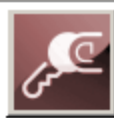
1. Description: CONFERENCE
2. Gen ledger acct -DR:
3. Gen ledger acct -CR:
4. G/L Journal Code:
5. Central resv code:
6. Active?: Y

Yes   Cancel   Delete

Your market segment codes (shown above) and source of business codes (not shown) are set up just like those for your hotel guests.

File   Reservations Menu   Front Desk   Sales   Night Audit   Manager/Setup   Direct Bill   Condo   Back Office   Food and Beverage/ Retail   Time and Attendance   System Maintenance   Help

Sales menu (dropdown):
- Meeting Rooms /Catering /Events
- Guest History
- Report Generator
- Crystal Reports
- Print Room Statistics
- Print Market Segment Analysis
- Print Daily Market Segment Analysis
- Print Occupancy Stats by Mk Seg/Source

Toolbar icons:
People/Profile   Reservations   Ro...   Display Folio   Post Folio   Check Out   Instant House Count   Housekeeping   Clock in/out

Next, go to Sales > Meeting Rooms/Catering/Eve...

Tree menu (left panel):
- Reservations Menu
- Front Desk
- Sales
  - Meeting Rooms /Catering /Ever...
  - Guest History
  - Report Generator
  - Crystal Reports
  - Print Room Statistics
  - Print Market Segment Analysis
  - Print Daily Market Segment An...
  - Print Occupancy Stats by Mk S...
- Night Audit
- Manager/Setup
- Direct Bill
- Condo
- Back Office
- Food and Beverage/ Retail
- Time and Attendance
- System Maintenance

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- To escape a screen, press <Esc> on your keyboard or click "Cancel". Mo... quick escape, to avoid losing data.
- You can multi-task by minimizing the current screen and opening another.... screen, click the appropriate bar in your taskbar at the bottom of your com...
- Enter dates as MMDDYY. For example, enter October 21, 2009 as 10210...
- When you're finished, go to File > Exit Execu/Tech.

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CATERING/ EVENT MANAGEMENT

Exit

1 Set-up/ Change Event
2 Look-up Room Availability
3 Print Event Status Report
4 Set-up Event Control File
5 Reservations
6 Front Desk
Exit

Before you set up your events, you need to set up control records such as departments, item categories, and items. Select Set-up Event Control File.

CATERING/ EVENT MANAGEMENT H...

Exit

1 Set up Event Items

2 Set up Item Categories

3 Set up Departments
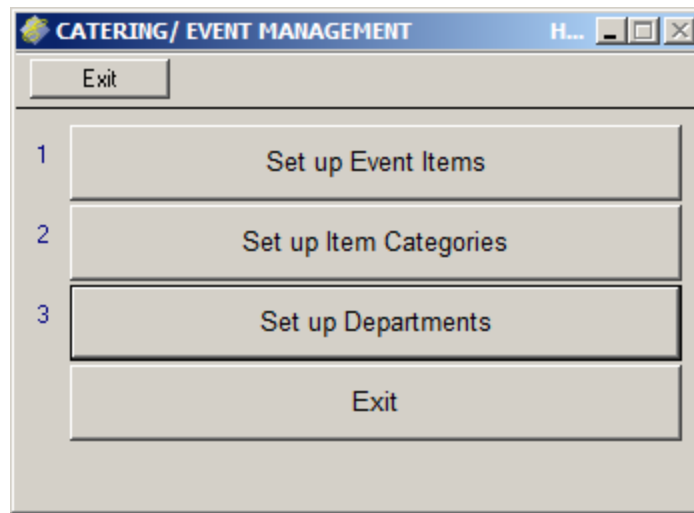
Exit

First, select Set up Departments.

Exit '

EXISTING DEPT

Department code: F 🔍

Description: FOOD & BEVERAGE

Report Food/beverage?: Y
Food/beverage detail?: Y

Report Media/AV?: N
Media/AV detail?: Y

Report Setup?: Y
Setup detail?: Y

Email address: joe@foodbevdept.com

Save   Delete

You may have as many departments as you wish. Examples are Catering, Food & Beverage, Housekeeping, Maintenance, Media and A/V and Management. Answer Y or N to the types of information you would like this department to receive on the Banquet Event Order form.

CATERING/ EVENT MANAGEMENT

Exit

1 Set up Event Items
2 Set up Item Categories
3 Set up Departments
   Exit
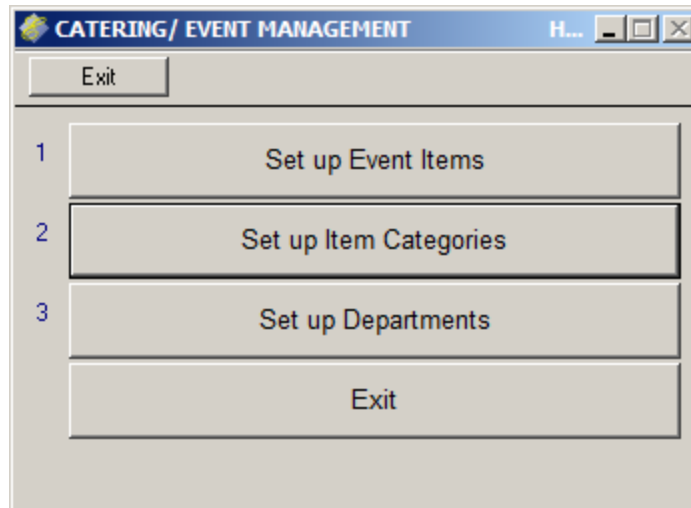
Next, select Set up Item Categories. Examples include Breakfast, Lunch, Media, Meeting Rooms, Miscellaneous, and Setup. Each item to print on the Banquet Event Order Form (BEO) must have a category.

CATEGORY SET UP

Exit

NEW CAT

Category: BREAKFAST-CONTINENTAL 🔍 < | >

Save   Delete
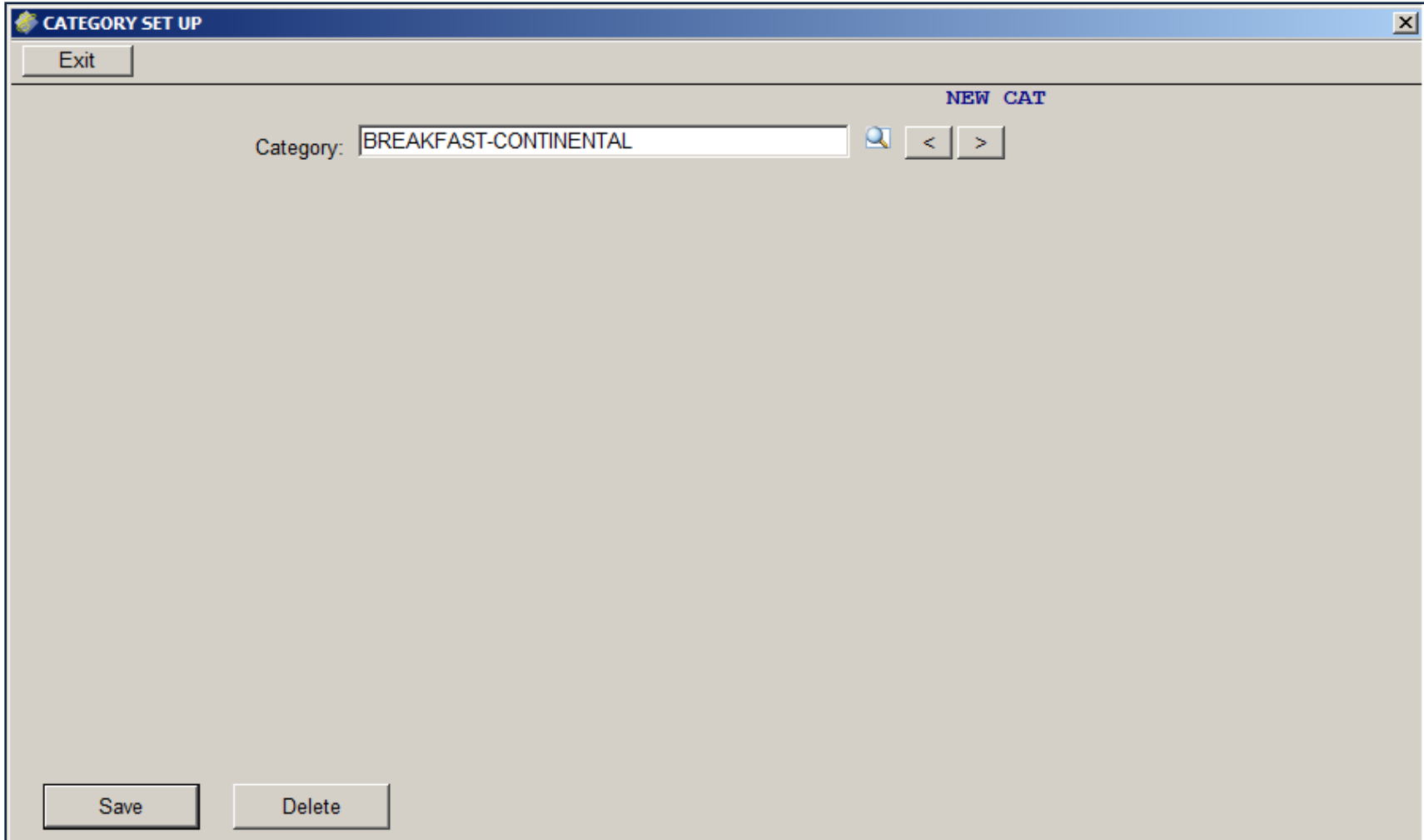
Enter a category name or description, up to 20 characters. They will display in alphabetical order on the lookup screen. Each item must have a valid category. Categories can have multiple items.

CATERING/ EVENT MANAGEMENT H...

Exit

1 Set up Event Items

2 Set up Item Categories

3 Set up Departments

Exit
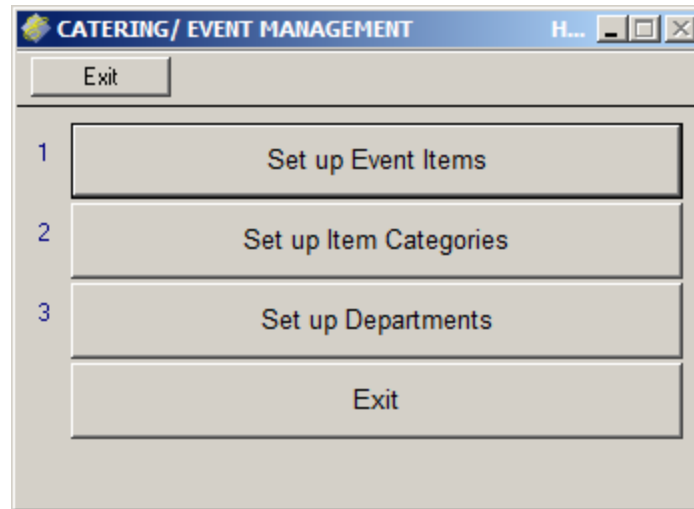
Next, select Set up Event Items. Any item which needs to appear on the event order form and items for which the group will be charged should be set up prior to the event setup. Each item can be used for more than one event. Examples include Chicken Dinner, East Ballroom, Round 8-Top, Projector, Wireless Microphone, and Coffee Urn.

MENU SET UP

Exit

Item code: `F110`   🔍 `<` `>`

Item type: `F`
Item category: `BREAKFAST-CONTINENTAL`   🔍
Item description: `European Continental Breakfast`
: `Savory and Sweet Pastries,`
: `Selection of cheeses and fresh fruits`
: `Tea, Herbal Tea, Coffee, Decaffeinated Coffee`
: `Granola, Plain Yogurt`
:
:
:
:
:

Item price: `12.00`
HOTEL charge code: `BFOO`
Subject to gratuity?: `Y`

Save   Delete

Each item must have a code, up to four characters. This code cannot be changed and should not be deleted once it has been used. Each item has a Type, which will be listed at the bottom of your screen. They are (F)ood & Beverage; (M)edia/AV, (S)etup; and (O)ther. The full description you enter will print on the Banquet Event Order. The first line of the description will print on the Event Check. The price is each. You must put a valid Hotel charge code. Answer Y to "Subject to gratuity" if the gratuity you set up in Meeting Rooms Parameters applies to this item.

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File   Reservations Menu   Front Desk   Sales   Night Audit   Manager/Setup   Direct Bill   Condo   Back Office   Food and Beverage/ Retail   Time and Attendance   System Maintenance   Help

Direct Bill menu:
- Customer Processing
- Print and Update Transaction Batch
- Print Customer Aged Trial Balance
- Print Customer Detail
- Print Customer Statements (Bal Fwd)
- Print Customer Statements (Open Item)
- Print Customer Labels
- Print Control File
- Control Files Set-up
- Report Generator
- Reorganize and Purge Customer Files

Toolbar icons:
People/Profile   Reservations   Rooms   Room Types   Room View   Instant House Count   Housekeeping   Clock in/out

Tree navigation:
- Reservations Menu
- Front Desk
- Sales
- Night Audit
- Manager/Setup
- Direct Bill
  - Customer Processing
  - Print and Update Transaction B
  - Print Customer Aged Trial Bala
  - Print Customer Detail
  - Print Customer Statements (Ba
  - Print Customer Statements (Op
  - Print Customer Labels
  - Print Control File
  - Control Files Set-up
  - Report Generator
  - Reorganize and Purge Custome
- Condo
- Back Office
- Food and Beverage/ Retail
- Time and Attendance
- System Maintenance

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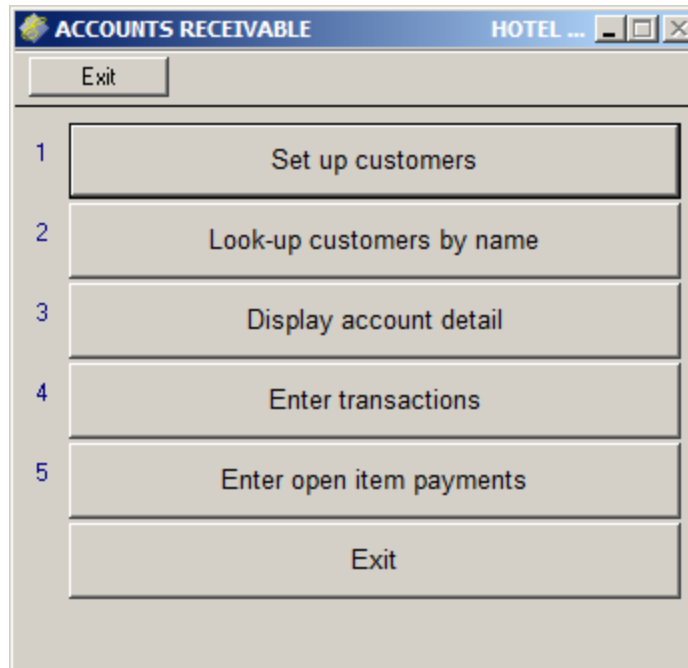
If the event will be Direct Billed, set up the customer in Direct Bill > Customer Proc

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- When you're finished, go to File > Exit Execu/Tech.

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To set up an account for this group so that you can Direct Bill them, go to Direct Bill > Customer Processing > Set up Customers.

Contact Execu/Tech Support if you would like a quote and/or wish to schedule training in Direct Bill Processing.

SET UP CUSTOMER - EXISTING ACCOUNT   HOTEL UNIVERSAL

Exit

CUSTOMER SETUP

Date first entered:

Customer code: ABC   ...   >

Date last activity: 5/17/90

Customer name: ABC COMPANY

CONTACT NAME...... JOE SMITH

Address 1: 222 MAIN ST

Address2:

City state zip: ATLANTA, GA 40222

Phone number: 5559994444

Account type (O/B): O

Active account?: Y

Charge late fees?:

Email address: joe@smith.com

Save   Cancel   Delete   Transactions

As with all Direct Bill customers, you'll need to set up a customer code up to 10 characters. The Account Type will be the capital letter O (not zero). Answer Y to Active Account. Fill in the other fields as appropriate.

Event Management Procedures

- Set up Group & Master Folio
- Block Guest Rooms
- Set up Event
- Post Deposit
- Enter Event Details
- Enter Event Items/Menus
- Print Event Check
- Post Item Charges
- Schedule Rooms
- Enter Memos to Departments
- Generate Reports
- Print Event Status Report

Front Desk   Sales   Night Audit   Manager/Setup   Direct Bill   Condo   Back Office   Food and Beverage/ Retail   Time and Attendance   System Maintenance   Help

Reservations Operations
Print Reservation Status Reports
Print Guest Deposit Reports
Print 7-730 Day Forecast
Print Confirmation Letters
Print Cancellation Letters
Print Registration Cards
Print Group Pick-up Report
Print Reservations/Guests by Group
Print Group Arrival Report
Print 23 Day Room Availability
Print Package Forecast

View | Check In | Display Folio | Post Folio | Check Out | Instant House Count | Housekeeping | Clock in/out
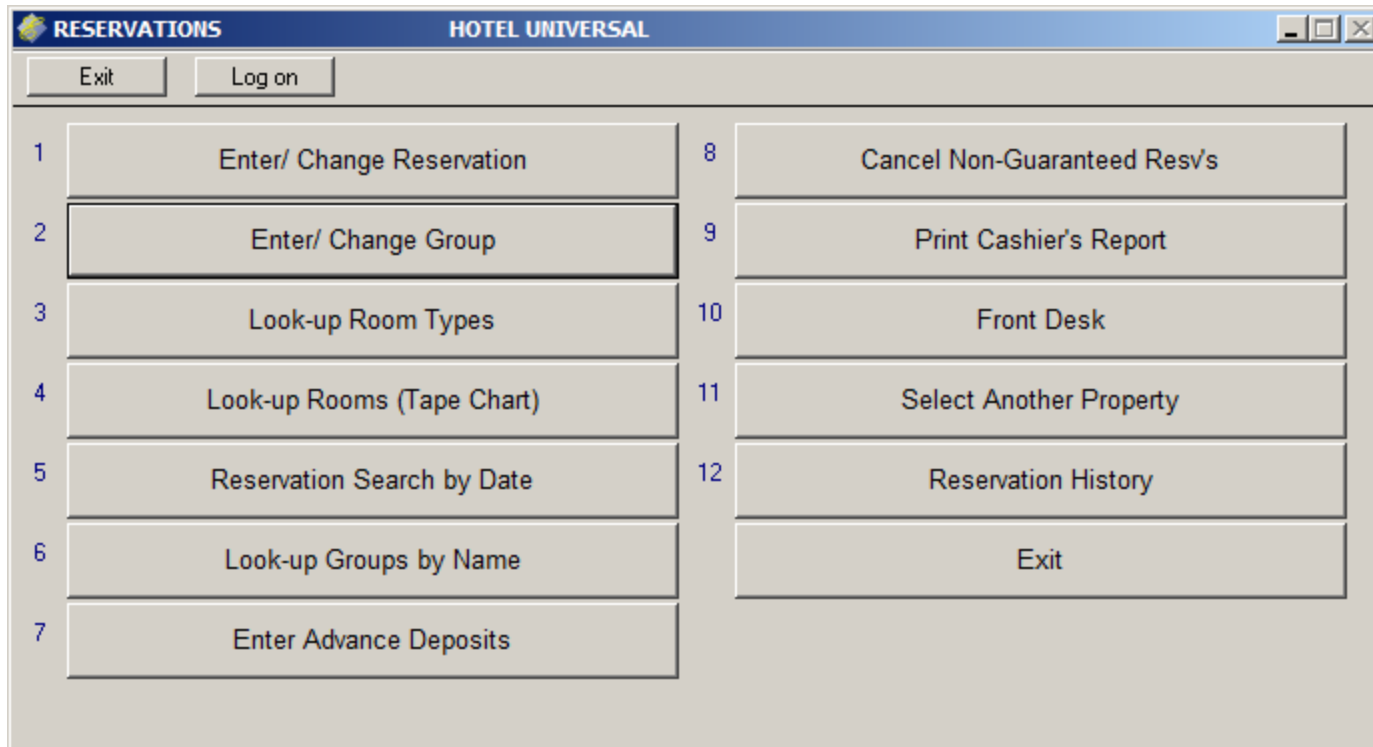
Go to Reservations Menu > Reservations Operations

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- To escape a screen, press <Esc> on your keyboard or click "Cancel". Most screens don't allow quick escape, to avoid losing data.
- You can multi-task by minimizing the current screen and opening another. To bring up the minimize screen, click the appropriate bar in your taskbar at the bottom of your computer screen.
- Enter dates as MMDDYY. For example, enter October 21, 2009 as 102109.
- When you're finished, go to File > Exit Execu/Tech.

on: C:\Program Files\Hotel-Demo   3:03 PM Friday, October 17, 2008

RESERVATIONS **HOTEL UNIVERSAL**

Exit	Log on

1	Enter/ Change Reservation	8	Cancel Non-Guaranteed Resv's
2	Enter/ Change Group	9	Print Cashier's Report
3	Look-up Room Types	10	Front Desk
4	Look-up Rooms (Tape Chart)	11	Select Another Property
5	Reservation Search by Date	12	Reservation History
6	Look-up Groups by Name		Exit
7	Enter Advance Deposits		

From the Reservations Menu, Reservations Operations, select Enter/Change Group. When prompted, either select "look up" for an existing group or enter the group code for a new group. The code may be alpha or numeric and up to 10 characters.

RESERVATIONS   **HOTEL UNIVERSAL**

Exit   Log on

Group Code: ABC-08   NEW GROUP

Master folio: 0   ☑ Apply master folio to reservations   REPEAT GUEST

☑ Create master folio automatically

Group name: ABC COMPANY CONFERENCE 2008
Address 1: 1234 MAIN STREET
Address 2:
City/state: PANAMA CITY   FL
Country/zip-postal: USA   32401
Contact: JOE SMITH
Phone number: 999-555-4444
Fax number: 999-666-3333
Comment 1:
Comment 2:
Comment 3:
Email address: joe@smith.com

Travel agency:
Type payment: DB
Account #: ABC
Expiration date: 0
Arrival date: 121108
Cut-off date: 120408
Market/Source: CONF   REP
Group Type: CONF
Tax exempt?: N

Save   Block rooms   Setup event   Delete   Update res'vs   Print screen   Autopost

If you wish for the system to create the Master folio, select "Create master folio automatically" and leave the Master folio field blank. If you already created the Master Folio, don't select "Create master folio automatically" and do insert the master folio number. Whether you create the folio manually or allow the system to do it, you will need the folio for posting the deposit plus charges and payments for the event. Select "Apply master folio to reservations" if the group's guest's room and tax charges are to post to the master folio. Continue to create the group as usual.

34

GROUP BLOCK

Group: ABC-08   ABC COMPANY CONFERENCE 2008   Arriving: 12/11/08

Enter the room type, rate or (P)ackage, and number of rooms blocked for each day.

Room Type	Room Rate	Pkg Code	Thu 12/11	Fri 12/12	Sat 12/13	Sun 12/14	Mon 12/15	Tue 12/16	Wed 12/17	Thu 12/18	Fri 12/19	Sat 12/20	Sun 12/21	Mon 12/22	Tue 12/23	Wed 12/24	Thu 12/25
DD	100.00		4	4	4												
DDNS	100.00		2	2	2												
K	110.00		4	4	4												

Exit/ Done   << Previous days   Next days >>   Print   Soft block rooms

To block guest rooms for this group, select Block Rooms from the Group setup screen. Enter the room type, nightly rate, and number of rooms of each type to block for each night. This information will print on your Contract. You will enter guest room reservations later. Reservations will not be covered in this user guide.

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RESERVATIONS   **HOTEL UNIVERSAL**

Exit   Log on

Group Code: ABC-08   NEW GROUP

Master folio: 0   ☑ Apply master folio to reservations   REPEAT GUEST

☑ Create master folio automatically

Group name: ABC COMPANY CONFERENCE 2008   Travel agency:
Address 1: 1234 MAIN STREET   Type payment: DB
Address 2:   Account #: ABC
City/state: PANAMA CITY   FL   Expiration date: 0
Country/zip-postal: USA   32401   Arrival date: 121108
Contact: JOE SMITH   Cut-off date: 120408
Phone number: 999-555-4444   Market/Source: CONF   REP
Fax number: 999-666-3333   Group Type: CONF
Comment 1:   Tax exempt?: N
Comment 2:
Comment 3:
Email address: joe@smith.com

Save   Block rooms   Setup event   Delete   Update res'vs   Print screen   Autopost

Once you've finished the group setup , you can select Setup Event to go to that screen next.

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CREATE GROUP MASTER FOLIO

A master folio and profile will now be created for this group.

Continue?

[Yes]   [No]
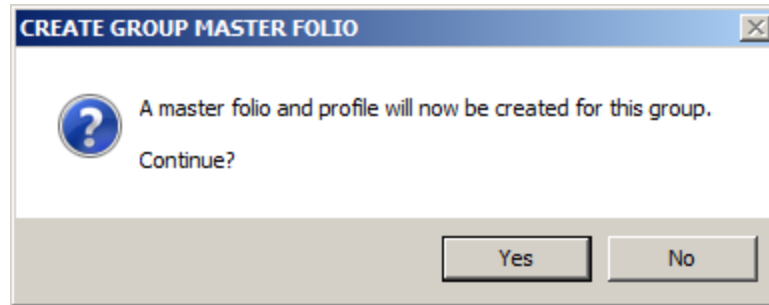
Select Yes if you want the master folio and profile to be created.

CATERING/ EVENT MANAGEMENT   **HOTEL UNIVERSAL**

E_x_it

Event Description: ABC COMPANY CONFERENCE

Contract number: 0000010010   EXISTING

Booking/ Billing

Group: ABC-08   ...   Folio: 0001018

Customer name: ABC COMPANY CONFERENCE 2008

Address 1: 1234 MAIN STREET

Address 2:

City/State: PANAMA CITY   FL

Postal code/Country: 32401   USA

Phone number: 999-555-4444   Fax/other: 999-666-3333

Email: joe@smith.com

Event amount: .00

Payments received: .00

Deposit 1 amount required: .00   Date: 0

Deposit 2 amount required: .00   Date: 0

Deposit 3 amount required: .00   Date: 0

Event date: 121108

Contract due date: 110108

Minimum revenue: .00

On-site

Contact name: JOE SMITH   copy

Address 1: 1234 MAIN STREET

Address 2:

City/State: PANAMA CITY   FL

Postal code/Country: 32401   USA

Phone number: 999-555-4444   Fax/other: 999-666-3333

Email: joe@smith.com

| Save | Memo | Rooms | Cancel | Generate documents | Enter items | Setup group | Post deposit |

*When you get to this screen, click the ellipsis box beside the group code for the system to import the group information including master folio. You can click Copy by the on-site contact name if this person is the event contact. **Event amount** and **Payments received** will populate automatically. You can enter up to three deposit amounts required and their due dates. You can enter the event date as well as the date that the customer or group representative should return the contract and deposit to you. You may enter a minimum revenue amount if you wish. Select **Post deposit** if you're ready to post the advance deposit for the event. You may do this at any time.*

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POST CHARGES/ PAYMENTS   **HOTEL UNIVERSAL**

E<u>x</u>it   Log on

BFOO	BANQUET FOOD	CK	CHECK
BROO	BANQUET/EVENT ROOM	DB	DIRECT BILL
BSCG	SERVICE CHARGE	DC	DINERS' CLUB
FTAX	FOOD & BEV SALES TAX	DS	DISCOVER CARD
LC	LOCAL CALL	MC	MASTER CARD
LD	LONG DISTANCE CALL	VS	VISA PAYMENT
MISC	MISC. CHARGE		
MOV	MOVIE CHARGE		
RC	ROOM CHARGE		
RCTE	ROOM CHARGE TAX EXEMP		
RT	ROOM TAX		
ST1	STATE SALES TAX		
AX	AMERICAN EXPRESS		
CA	CASH PAYMENT		

ABC COMPANY CONFERENCE 2008   Balance: .00

Room No: M
Folio: 1018

Payment: CK
Reference.: #10023
DEPOSIT
Amount: -500.00
Ok? (Y/N): Y

Display | Print folio | More | Void | Adjustment | Transfer

When you select Post Deposit from the Event Setup screen, you'll be brought to this screen to enter the deposit. The procedure is the same as for any payment posting. When you're finished posting the deposit, you'll return automatically to the Event Setup screen.

CATERING/ EVENT MANAGEMENT   HOTEL UNIVERSAL

Exit

Event Description: ABC COMPANY CONFERENCE

Contract number: 0000010010   EXISTING

Booking/ Billing

Group: ABC-08   ...   Folio: 0001018

Customer name: ABC COMPANY CONFERENCE 2008

Address 1: 1234 MAIN STREET

Address 2:

City/State: PANAMA CITY   FL

Postal code/Country: 32401   USA

Phone number: 999-555-4444   Fax/other: 999-666-3333

Email: joe@smith.com

Event amount: .00

Payments received: .00

Deposit 1 amount required: .00   Date: 0

Deposit 2 amount required: .00   Date: 0

Deposit 3 amount required: .00   Date: 0

Event date: 121108

Contract due date: 110108

Minimum revenue: .00

On-site

Contact name: JOE SMITH   copy

Address 1: 1234 MAIN STREET

Address 2:

City/State: PANAMA CITY   FL

Postal code/Country: 32401   USA

Phone number: 999-555-4444   Fax/other: 999-666-3333

Email: joe@smith.com

Save   Memo   Rooms   Cancel   Generate documents   Enter items   Setup group   Post deposit

After you've posted your deposit you'll return automatically to the event setup screen. Next, select Enter Items.

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SET UP EVENT ITEMS   **HOTEL UNIVERSAL**   _ | □ | ×

Exit

Event: ABC COMPANY CONFERENCE

Contract: 0000010010

Food/beverage:	824.25
Media/AV:	45.00
Setup:	135.00
Other:	934.00

Service charge:	387.65
Tax:	32.97
Event total:	2358.87

Item	Description	Comment	Quantity	Unit Price	Extended Price	Date	Beg Time	End Time	Post
F110	European Continental Breakfast		15.0000	12.0000	180.00	121108	600	900	Y
R103	ROOM CHARGE - ATRIUM		1.0000	200.0000	200.00	121108	600	900	Y
F110	European Continental Breakfast		15.0000	12.0000	180.00	121208	600	900	N
R103	ROOM CHARGE - ATRIUM		1.0000	200.0000	200.00	121208	600	900	N
R104	ROOM CHARGE - BOARD ROOM		1.0000	500.0000	500.00	121208	800	500P	N
F104	LUNCH: Misc Sandwiches, Crudite		15.0000	12.0000	180.00	121208	1100	100P	N
F102	DINNER: Seafood Buffet w/ Beve		15.0000	18.9500	284.25	121208	600P	900P	N
S103	TABLE - ROUND - 8 SEATS		2.0000	30.0000	60.00	121108	600	900	Y
S103	TABLE - ROUND - 8 SEATS		2.0000	30.0000	60.00	121208	600	900	N
S107	TABLE - RECTANGLE-DISPLAY -		1.0000	15.0000	15.00	121208	800	500P	Y
M101	PANASONIC SMART SCREEN 52		1.0000	45.0000	45.00	121208	800	500P	Y
H101	WATER - BOTTLES CHILLED		2.0000	10.0000	20.00	121208	800	500P	N
H102	COFFEE URN		1.0000	14.0000	14.00	121208	200P	400P	N

Calculate totals	Save/ exit	Print screen	Post to folio	Print check	Delete items

Enter the code for each item for this event. You can enter ? In the item field to look up the item. The description defaults to the first line of the item's description. You may enter a comment. Enter the quantity of each item. The price will default as it was set up. You may change the price. Extended price is calculated automatically. Enter the date, beginning time and ending time for each item. In the last column, enter Y when you are ready for an item to be posted when "post to folio" is selected. Each line can post only once. When you are finished, you can select Calculate totals and they will display at the top. Select print check if you wish to present the check to the guest or representative. You may print the check at any time and more than once.

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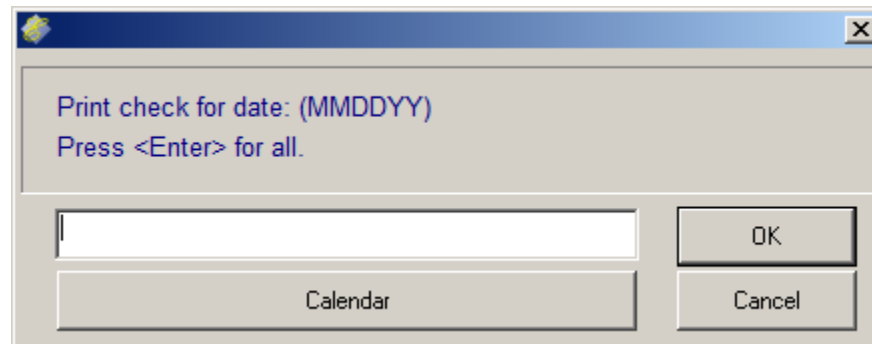
You can print all items on one check or you can select a date for only that date's items to print.

Catering Event Check

To: ABC COMPANY CONFERENCE 2008   Check number: 0000010010

JOE SMITH   Date: Tuesday, October 21, 2008

1234 MAIN STREET   Room:

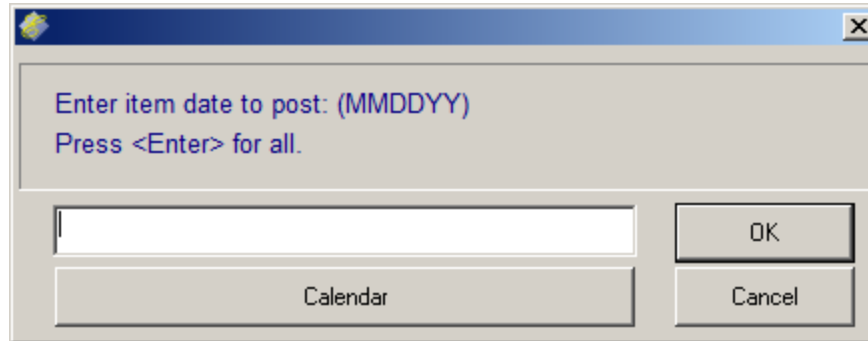   Sales Manager:

PANAMA CITY, FL 32401

Payment: Account: 0001018

Quantity	Description	Unit Price	Total
15	European Continental Breakfast	12.00	180.00
1	ROOM CHARGE - ATRIUM	200.00	200.00
15	European Continental Breakfast	12.00	180.00
1	ROOM CHARGE - ATRIUM	200.00	200.00
1	ROOM CHARGE - BOARD ROOM	500.00	500.00
15	LUNCH: Misc Sandwiches, Crudites, Chips, Dessert, Beverage	12.00	180.00
15	DINNER: Seafood Buffet w/ Beverage	18.95	284.25
2	TABLE - ROUND - 8 SEATS	30.00	60.00
2	TABLE - ROUND - 8 SEATS	30.00	60.00
1	TABLE - RECTANGLE-DISPLAY - 36" l	15.00	15.00
1	PANASONIC SMART SCREEN 52"	45.00	45.00
2	WATER - BOTTLES CHILLED	10.00	20.00
1	COFFEE URN	14.00	14.00
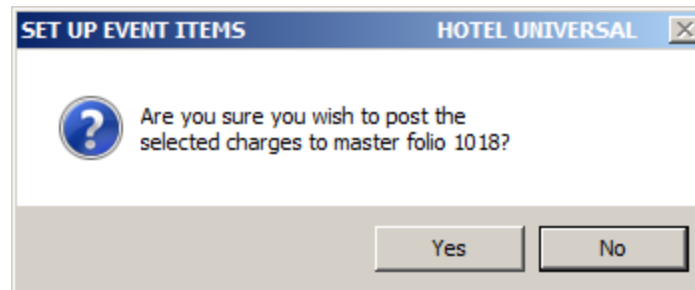
Sub total:	1,938.25
20% Service Charge:	387.65
Sales Tax:	32.97
Subtotal:	2,358.87
Advance Deposit:	

Sample Event Check

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From the Event Setup screen, you can select "Post charges" for the event's charges to post automatically to the master folio. A line must be set to Y in the Post column for it to post. Each item will post only once.

Exit   Log on

Folio: 1018   Resv: Ck-in: 1   Room: M   Rate:

Name: ABC COMPANY CONFERENCE 2008   Checked in: 10/17/08 3:09pm

Address: 1234 MAIN STREET   Depart: 1/10/09 85 Days

PANAMA CITY, FL USA 32401   Checked out:

Company:

Group: ABC-08   Pmt: DB   Limit: .00   ABC   A/R Balance.. 9458.88

Pmt: Limit:

DATE	TIME	EMPL	CODE	REF	COMMENT	AMOUNT	BALANCE
10/21/08	7:56a P	1	CK	#10023	DEPOSIT	500.00-	500.00-
10/21/08	8:32a C	1	BFOO	0000010010	European Continental	180.00	320.00-
10/21/08	8:32a C	1	BROO	0000010010	ROOM CHARGE - ATRIUM	200.00	120.00-
10/21/08	8:32a C	1	BFOO	0000010010	European Continental	180.00	60.00
10/21/08	8:32a C	1	BROO	0000010010	ROOM CHARGE - ATRIUM	200.00	260.00
10/21/08	8:32a C	1	BROO	0000010010	ROOM CHARGE - BOARD	500.00	760.00
10/21/08	8:32a C	1	BFOO	0000010010	LUNCH: Misc Sandwich	180.00	940.00
10/21/08	8:32a C	1	BFOO	0000010010	DINNER: Seafood Buff	284.25	1,224.25
10/21/08	8:32a C	1	ST1	0000010010	STATE SALES TAX	32.97	1,257.22
10/21/08	8:32a C	1	BSCG	0000010010	SERVICE CHARGE	387.65	1,644.87
					Balance due:		1644.87

Balance due: 1644.87

Done   Previous page   Print Screen   Change folio   Post   Print Folio   ☐ Show Voids

Folio display after Deposit and Event Items have posted

Your Hotel Logo

HOTEL UNIVERSAL
535 HARRISON AVE.
PANAMA CITY, FL 32401
850-747-0581

GUEST FOLIO

Page: 1

Guest:		Folio: 1018	Checked In: 10/17/08 3:09pm
ABC COMPANY CONFERENCE 2008 1234 MAIN STREET PANAMA CITY, FL USA32401		Room: M	Checked Out: 1/10/09
		Rate:	Adults: 1 Children: 0
Company: ABC ABC COMPANY		Payment: DB DIRECT BILL	

DATE	REFERENCE	DESCRIPTION	AMOUNT	BALANCE
10/21/08	#10023	DEPOSIT	500.00-	500.00-
10/21/08	0000010010	European Continental	180.00	320.00-
10/21/08	0000010010	ROOM CHARGE - ATRIUM	200.00	120.00-
10/21/08	0000010010	European Continental	180.00	60.00
10/21/08	0000010010	ROOM CHARGE - ATRIUM	200.00	260.00
10/21/08	0000010010	ROOM CHARGE - BOARD	500.00	760.00
10/21/08	0000010010	LUNCH: Misc Sandwich	180.00	940.00
10/21/08	0000010010	DINNER: Seafood Buff	284.25	1224.25
10/21/08	0000010010	STATE SALES TAX	32.97	1257.22
10/21/08	0000010010	SERVICE CHARGE	387.65	1644.87
		Balance Due (Direct Billed):		**1644.87**

Sample Printed Master Folio

Guest signature:_____

Exit

Event Description: ABC COMPANY CONFERENCE

Contract number: 0000010010   EXISTING

Booking/ Billing

Group: ABC-08   ...   Folio: 0001018

Customer name: ABC COMPANY CONFERENCE 2008

Address 1: 1234 MAIN STREET

Address 2:

City/State: PANAMA CITY   FL

Postal code/Country: 32401   USA

Phone number: 999-555-4444   Fax/other: 999-666-3333

Email: joe@smith.com

Event amount: .00

Payments received: .00

Deposit 1 amount required: .00   Date: 0

Deposit 2 amount required: .00   Date: 0

Deposit 3 amount required: .00   Date: 0

Event date: 121108

Contract due date: 110108

Minimum revenue: .00

On-site

Contact name: JOE SMITH   copy

Address 1: 1234 MAIN STREET

Address 2:

City/State: PANAMA CITY   FL

Postal code/Country: 32401   USA

Phone number: 999-555-4444   Fax/other: 999-666-3333

Email: joe@smith.com

| Save | Memo | Rooms | Cancel | Generate documents | Enter items | Setup group | Post deposit |

Select Rooms when you're ready to schedule the meeting or banquet rooms for this event.

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SET UP EVENT ITEMS   **HOTEL UNIVERSAL**

Exit

Event: 0000010010   ABC COMPANY CONFERENCE   Right click on room for full description

Thursday, 12/11/08		12:00A	1:00A	2:00A	3:00A	4:00A	5:00A	6:00A	7:00A	8:00A	9:00A	10:00A	11:00A	1
ROOM		12:30A	1:30A	2:30A	3:30A	4:30A	5:30A	6:30A	7:30A	8:30A	9:30A	10:30A	11:30A	1
901	NORTH BALLROOM													
902	WEST BALLROOM													
903	ATRIUM													
904	ROSE RECEPTION ROOM													
905	EXECUTIVE BOARD ROOM													

In the grid at the bottom of your screen, enter the information as shown below.

Save	<< Previous day	Next day >>	Print screen

Room	Date	Setup time	Start time	End time	Time out	Setting	Function	Expected	Guaranteed	Rental amount
903	121108	530P	600P	900P	1000P	(2) 8-TOP ROUND	RECEPTION	15	15	250.00
905	121208	700	800	500	600P	CONFERENCE / DISPLAY	BUSINESS MEETING	15	15	500.00

Room setup description

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NOTES: ABC COMPANY CONFERENCE ... FOR: MEDIA

| Exit | Save / exit | Print |

Sample Memo for Media Department

You may enter as much information as you wish for each department.

The next section deals with generating documents. These include contracts and banquet event orders. Your system comes with one default banquet event order and three contracts. You may create additional documents. If you are not familiar with creating and editing "tagged" formatted documents, please contact your IT manager. If you wish Execu/Tech to assist you in creating these documents, we will be happy to do so for our standard hourly rate.

Please read the following instructions carefully and adhere to them. Otherwise, your "Oops, I messed up" call to Support will be handled appropriately.

CATERING/ EVENT MANAGEMENT   HOTEL UNIVERSAL

Exit

Event Description: ABC COMPANY CONFERENCE

Contract number: 0000010010   EXISTING

Booking/ Billing

Group: ABC-08   ...   Folio: 0001018

Customer name: ABC COMPANY CONFERENCE 2008

Address 1: 1234 MAIN STREET

Address 2:

City/State: PANAMA CITY   FL

Postal code/Country: 32401   USA

Phone number: 999-555-4444   Fax/other: 999-666-3333

Email: joe@smith.com

Event amount: 2358.87

Payments received: -500.00

Deposit 1 amount required: .00   Date: 0

Deposit 2 amount required: .00   Date: 0

Deposit 3 amount required: .00   Date: 0

Event date: 121108

Contract due date: 110108

Minimum revenue: .00

On-site

Contact name: JOE SMITH   copy

Address 1: 1234 MAIN STREET

Address 2:

City/State: PANAMA CITY   FL

Postal code/Country: 32401   USA

Phone number: 999-555-4444   Fax/other: 999-666-3333

Email: joe@smith.com

Save | Memo | Rooms | Cancel | Generate documents | Enter items | Setup group | Post deposit

*Select **Generate documents** when you're ready to edit and send your Banquet Event Order and contract.   The group and event information will populate the document as appropriate. This DOES NOT print the document. This simply generates the document and populates it, opening it in Word® for you to edit, print, or process as you desire.*

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Select Report:

Hotel-Demo ▸ documents ▸   Search

Organize ▾   Views ▾   New Folder

Favorite Links
- Documents
- Recently Changed
- Computer
- More »

Name ▲	Date modified	Type	Size	Tags

📁 ABC COMPANY CONFERENCE   📄 Banquet Event Order Master.doc
📄 Leisure Group Room Contract.doc   📄 Rooms and Catering Contract.doc
📄 Rooms Only Contract.doc   📄 Wedding Contract Catering Onl…
📄 Wedding Contract with Rooms.…

Folders ⌄
- HOTEL
- hotel-copy-(
- Hotel-Demo
  - $pfebk
  - backoffice
  - condo
  - core
  - documents
    - ABC CO
  - REPORTS

File name: Rooms and Catering Contract.doc   Event Documents (*.doc)

Open   Cancel

When you select <u>Generate documents</u> *from the events screen, a Select Report window will open, containing the Documents. It will look similar to the window shown above. Select the document you wish to generate and click "Open". NOTE: You will have other folders inside the Documents folder. DO NOT select documents from those folders when you're generating documents.*

CATERING/ EVENT MANAGEMENT   HOTEL UNIVERSAL

Exit

Event Description: ABC COMPANY CONFERENCE

Contract number: 0000010010   EXISTING

Booking/ Billing

Group: ABC-08   ...   Folio: 0001018

Customer name: ABC COMPANY CONFERENCE 2008

Address 1: 1234 MAIN STREET

Address 2:

City/State: PANAMA CITY   FL

Postal code/Country: 32401   USA

Phone number: 999-555-4444   Fax/other: 999-666-3333

Email: joe@smith.com

Event amount: 2358.87

Payments received: -500.00

Deposit 1 amount required: .00   Date: 0

Deposit 2 amount required: .00   Date: 0

Deposit 3 amount required: .00   Date: 0

Event date: 121108

Contract due date: 110108

Minimum revenue: .00

On-site

Contact name: JOE SMITH   copy

Address 1: 1234 MAIN STREET

Address 2:

City/State: PANAMA CITY   FL

Postal code/Country: 32401   USA

Phone number: 999-555-4444   Fax/other: 999-666-3333

Email: joe@smith.com

ExecuPrint

Generating Report
and Opening MS Word

Save   Memo   Rooms   Cancel   Generate documents   Enter items   Setup group   Post deposit

After you select the document to generate, you'll return to the Event Setup screen. You'll see the message "Generating Report and Opening MS Word". Please __wait__ while this occurs. When it is finished, the message will disappear and the document will open in Word®. You may edit, print, or send the document just as with any other Word® document.

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Editing MASTER FORMS:

IMPORTANT: To edit the MASTER forms, locate the Documents folder within your Hotel directory. Open the forms with Word. If you are unfamiliar with editing coded and formatted documents, please consult your IT manager for assistance. Default forms have been provided with your Catering and Event Management program for you to use.
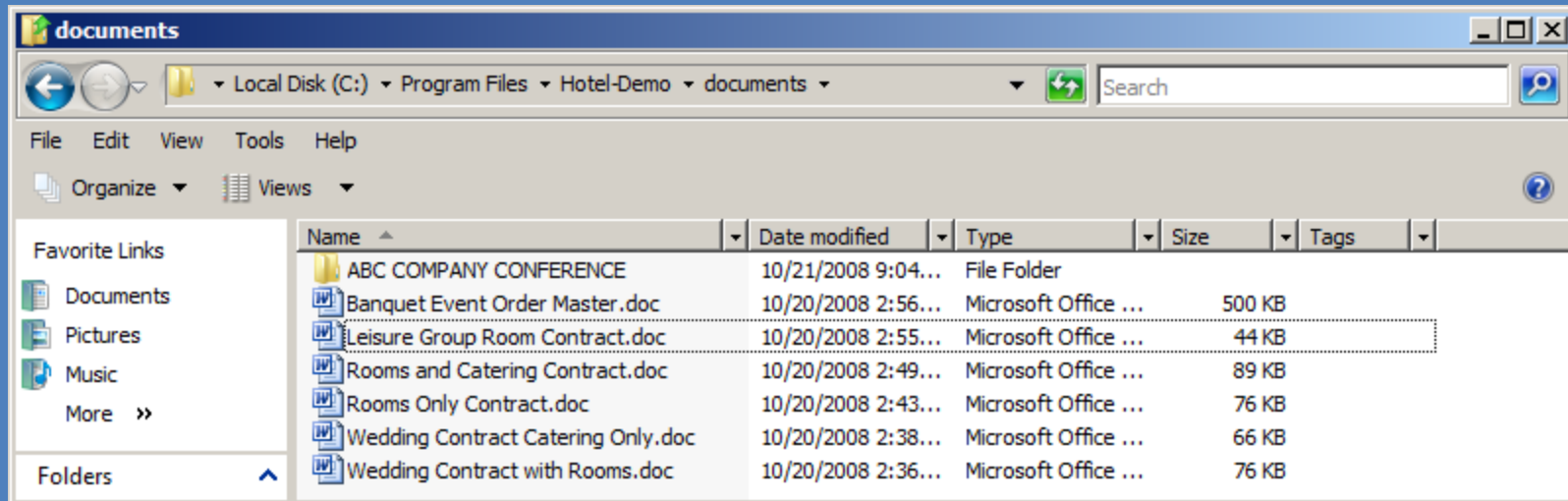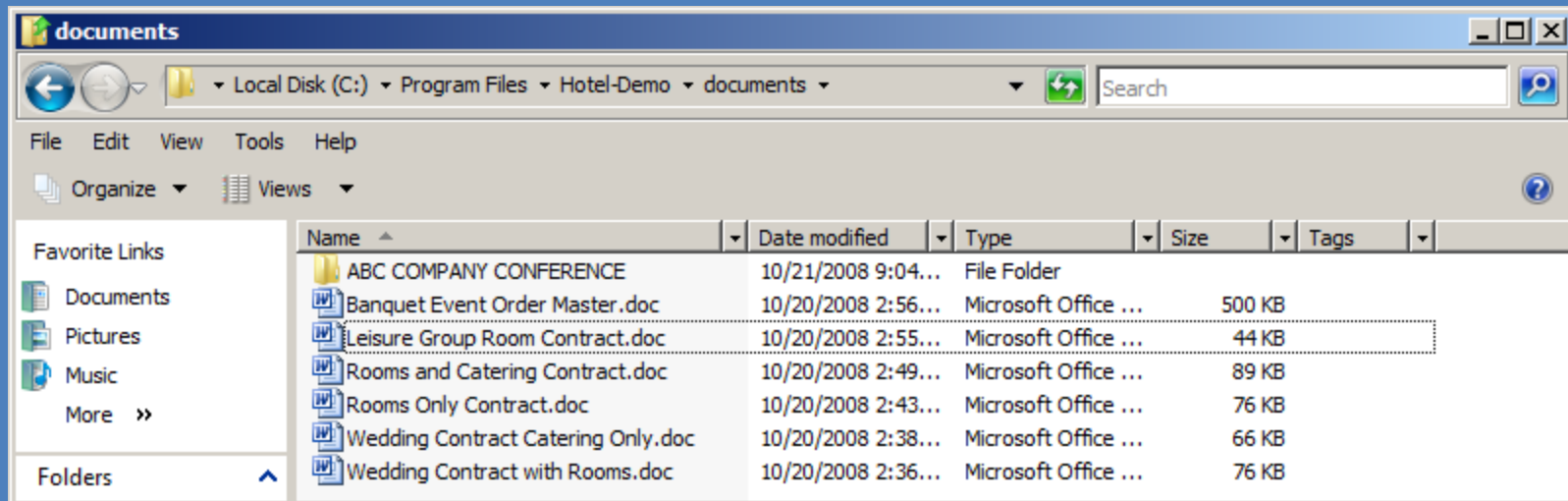

In the above example, Leisure Group Room Contract is selected to edit. Open the document in Word®.

It's important that you edit the correct documents. Make sure to make a backup copy before any editing.

Editing Auto-Generated Forms Created for an Event – Part 1

IMPORTANT: **To edit the auto-generated forms for a group or event, locate the Documents folder within your Hotel directory. If you do not know where this is, contact your IT Manager. Open the Documents folder and then open the folder with the event name. DO NOT open the documents that are not in individual event folders. DO NOT edit the master forms if you simply want to edit a form for a group or event. Open the forms with Word.**
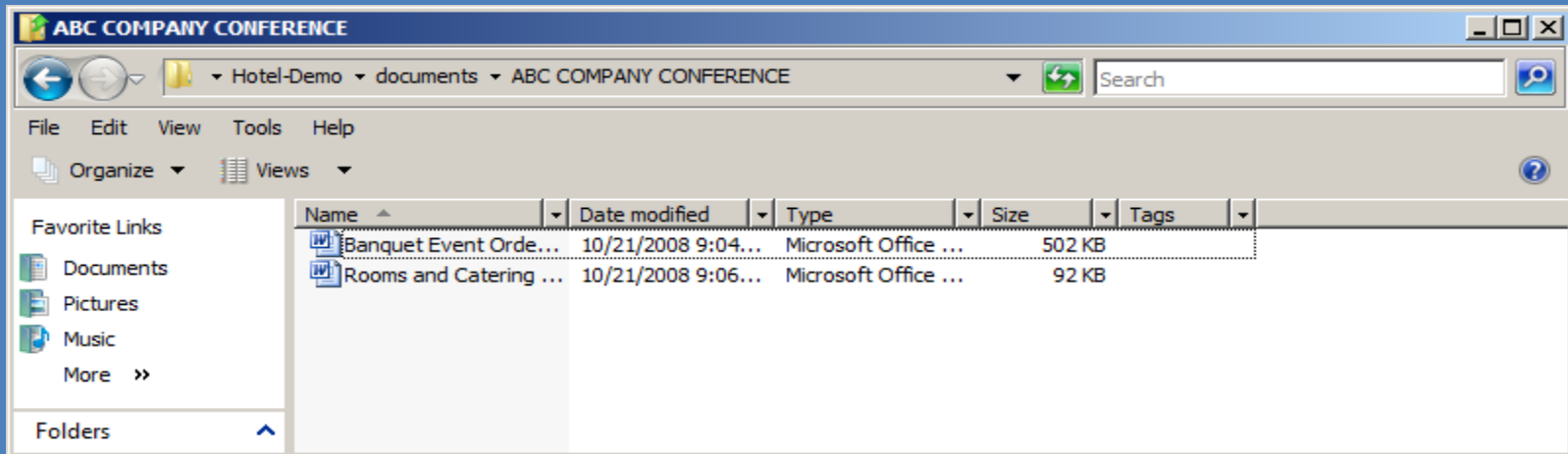

In the example above, you would choose ABC COMPANY CONFERENCE, which is the name of the event. The system will create these folders at the time the auto-generated documents are created. Do not create folders within the Documents folder.

It's important that you edit the correct documents. Make sure to make a backup copy before any editing.

Editing Auto-Generated Forms Created for an Event – Part 2

IMPORTANT: To edit the auto-generated forms for a group or event, locate the Documents folder within your Hotel directory. If you do not know where this is, contact your IT Manager. Open the Documents folder and then open the folder with the event name. DO NOT open the documents that are not in individual event folders. ABC COMPANY CONFERENCE folder was selected and has two documents. The documents were created by selecting "Generate documents" from the Event setup screen.

In the example above, you would choose the document you wish to edit for this event. Open the document in Word®. You may edit, print, or process the form just as you would any document in Word.

It's important that you edit the correct documents. Make sure to make a backup copy before any editing.

HOTEL UNIVERSAL CATERING

535 HARRISON AVENUE
PANAMA CITY, FL 32401
850-747-0581

Banquet Event Order

Event: ABC Company Conference   Contract: 0010015

Group Name:	ABC COMPANY CONFERENCE 2008	**Event Date:**	December 11, 2008
Booking Contact:	JOE SMITH	**On-Site Contact:**	JOE SMITH
Booking Contact Phone Number:	999-555-4444	**On-Site Contact Phone Number:**	999-555-4444
Fax #:	999-666-3333	**Email Address:**	joe@smith.com
Address:	1234 MAIN STREET PANAMA CITY, FL32401	**Form of Payment: Deposit Received:**	DIRECT BILL 500.00
Email Address:	joe@smith.com	**Master Folio #:**	0000001018

Date/ Time	Function	Room Name	Set Up	Exp.	Guar.	Room Rental
12/11 5:30 pm	RECEPTION	ATRIUM	(2) 8-TOP ROUND	15	15	250.00
12/12 7:00 am	BUSINESS MEETING	EXECUTIVE BOARD ROOM	CONFERENCE / DISPLAY	15	15	500.00

Food and Beverage Functions:

12/11 6:00 am: qty 15: price 180.00:
European Continental Breakfast Savory and Sweet Pastries, Selection of cheeses and fresh fruits Tea, Herbal Tea, Coffee, Decaffeinated Coffee Granola, Plain Yogurt
12/12 6:00 am: qty 15: price 180.00:
European Continental Breakfast Savory and Sweet Pastries, Selection of cheeses and fresh fruits Tea, Herbal Tea, Coffee, Decaffeinated Coffee Granola, Plain Yogurt
12/12 11:00 am: qty 15: price 180.00:
LUNCH: Misc Sandwiches, Crudites, Chips, Dessert, Beverage
12/12 6:00 pm: qty 15: price 284.25:
DINNER: Seafood Buffet w/ Beverage

Room Set Up

12/11 6:00 am: qty 2: price 60.00:
TABLE - ROUND - 8 SEATS
12/12 6:00 am: qty 2: price 60.00:
TABLE - ROUND - 8 SEATS

AV Needs:

12/12 8:00 am: qty 1: price 45.00:
PANASONIC SMART SCREEN 52"

Miscellaneous Notes:

Sample Memo to Food and Beverage Department

Sample Banquet Event Order

HOTEL UNIVERSAL CATERING

Tuesday, October 21, 2008

JOE SMITH
ABC COMPANY CONFERENCE 2008
1234 MAIN STREET

PANAMA CITY, FL32401

The information and agenda below constitute a contract between ABC COMPANY
CONFERENCE 2008, and Hotel Universal Catering and will be helpful during the
planning of your stay with us.

Sleeping Room Accommodations: It is a pleasure to confirm the following arrangements
on a tentative basis. These rooms have been blocked for your group and you have until
December 01, 2008 to provide a rooming list. After December 01, 2008, any blocked
rooms not reserved by a rooming list will be removed from your block of rooms and will
become available to other guests.

Date	December 11, 2008	December 12, 2008	December 13, 2008				
Day	Thursday	Friday	Saturday				
Rooms	10	10	10				

Guest Room Rates:
The hotel agrees to offer the following guest room rates during the official dates of your
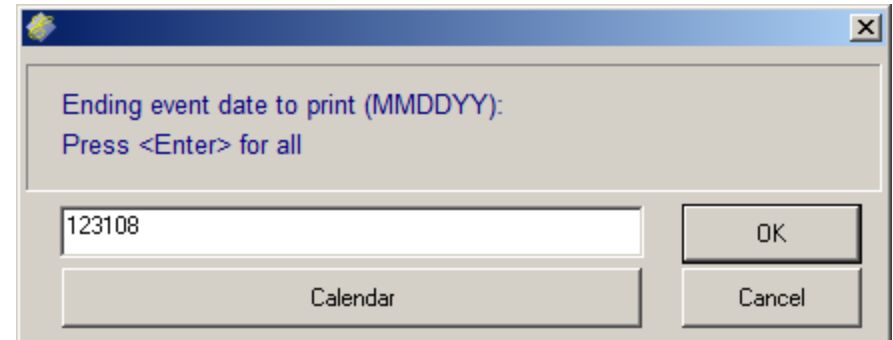program as outlined below. Please note: Room rates are quoted for 1-4 person
occupancy.

Guest Room Accommodations	Guest Room Rate Per Room, Per Night
DBL/DBL	100.00
DBL/DBL NO SMOKING	100.00
KING	110.00

Room rate quotations are based on a per room, per night basis and are subject to all local
and state taxes. At this time the current city and state taxes are 12%

Commissionable Rates:

Sample Event Contract

To print an Event Status Report, go to the Sales Menu. Select Catering / Event Management and then select Print Event Status Report. Enter the beginning and ending dates for the date range you want to print.

CATERING/ EVENT MANAGEMENT   H...

Exit

1	Set-up/ Change Event
2	Look-up Room Availability
3	Print Event Status Report
4	Set-up Event Control File
5	Reservations
6	Front Desk
	Exit

Beginning event date to print (MMDDYY):
Press <Enter> for all

120108

OK

Calendar

Cancel

Ending event date to print (MMDDYY):
Press <Enter> for all

123108

OK

Calendar
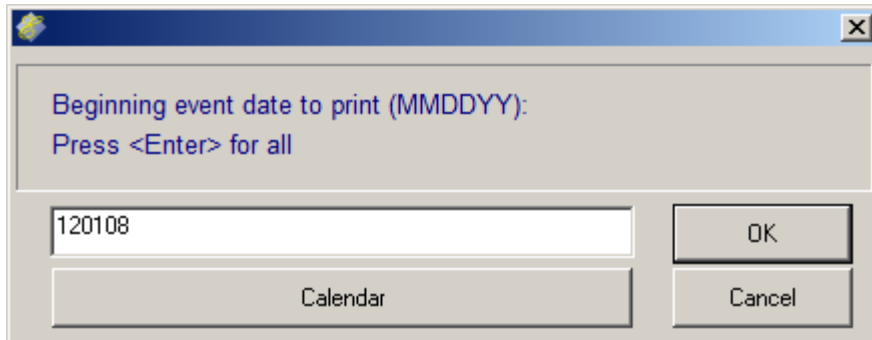
Cancel

Date printed: 10/21/08   Page: 1
Time printed: 8:46 am

        Event   Contract#   Customer / Group   Folio #
===
ABC COMPANY CONFERENCE   10010 ABC COMPANY CONFERENCE 2008   1018
    Phone:999-555-4444   0 Expected. $2,358.87=Contract-amt. Made:10/17/08
    Fax..:999-666-3333   0 Guarantd. $.00=Deposit-req.   By..:
Room:903 Date:12/11/08 From: 5:30pm Start: 6:00pm End: 9:00pm Until:10:00pm
Room:905 Date:12/12/08 From: 7:00am Start: 8:00am End: 5:00am Until: 6:00pm

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Sample Event Status Report

- **Initial Setup**
  - **Hotel (Execu/Suite) Control Files**
    - Meeting Room Parameters
    - Room Types
    - Rooms
    - Tax Codes
    - Charge Codes
    - Market Segment Codes
    - Source of Business Codes
  - **Event Control Files**
    - Departments
    - Categories
    - Items
- **Event Management**
  - **Step One:** Direct Bill Customer Setup (Optional)
  - **Step Two:** Group Setup (remember to select "create master folio automatically")
  - **Step Three:** Block guest rooms from Group setup screen (Optional)
  - **Step Three:** Select "setup event" from Group setup screen
  - **Step Four:** Fill in information as shown in instructions.
  - **Step Five:** Click Post Deposit. This can be done now or later. This should be done only once for each deposit for this event.
  - **Step Six:** Click Setup Event. Enter the event items as shown in instructions. Click Calculate Totals.
  - **Step Seven:** From the Event Items Setup screen, Click Print Event Check. This can be done now or later, as many times as you wish.
  - **Step Eight:** From the Event Items Setup screen, Click Post to folio. This can be done now or later. Each item can be posted only once.
  - **Step Nine:** From the Event Setup screen Generate reports, following instructions in this guide.