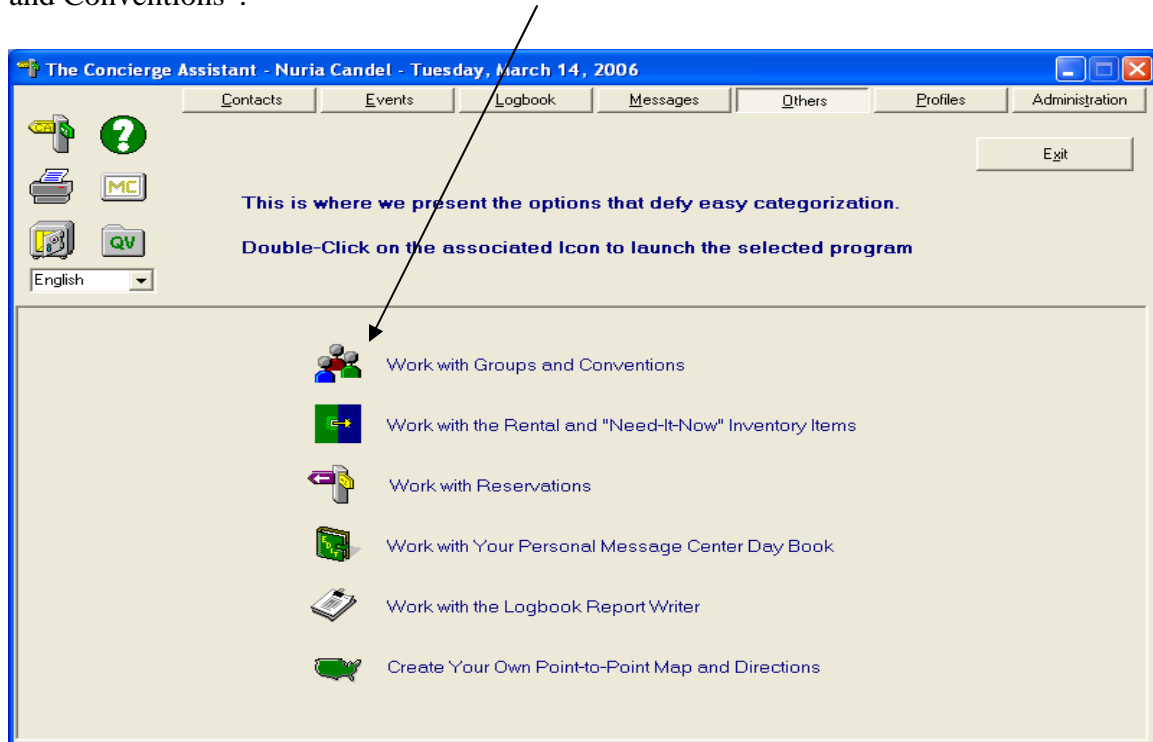


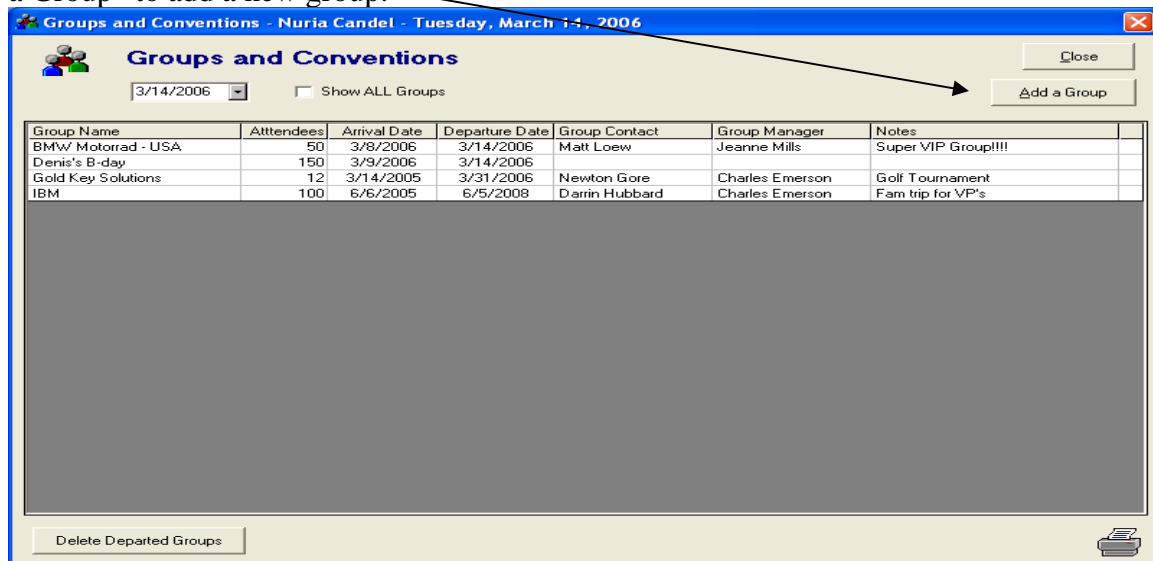
5.1 Groups

This part will allow you to A. Have information about a group at your fingertips and B. group individual Logbook entries under one common denominator, being a Group, a Wedding or even a family gathering.

5.1.1 Create a Group. In the OTHERS tab, open the first icon, named “Work with Groups and Conventions”.



The screen will show you any group that is staying with you are that time, click on “Add a Group” to add a new group.



In order to create a group, these are the required elements, then click “Save”

- Name of the Group
- Number of Attendees
- Arrival & Departure

Groups and Conventions - Nuria Candel - Tuesday, March 14, 2006

Groups and Conventions Close

Group Name: Mercedes Benz - Kapalua

Attendees: 150

Arrival Date: 3/15/2006 Departing: 3/20/2006 193

Notes: PGA Golf Trmnt - VIP's Sergio Garcia and Seve Ballesteros

Group Contact: Amanda Blake

Meeting Planner: Tiger Woods

Group Manager: Jeanne Mills ...

Sales Manager: Fred Jensen ...

Save Delete Clear

To Add a New Group the following fields are required:

- 1) Group Name
- 2) Attendees
- 3) Group Arrival Date
- 4) Group Departure Date

The remaining fields are optional. Group Managers and Sales Managers are the in-house contacts for the group. Press the <...> button to maintain a list of these staff members.

Once a Group has been added this panel will disappear and you will be able to add the meeting schedule for the group.

Once saved, much more information can be added:

Groups and Conventions - Nuria Candel - Tuesday, March 14, 2006

Groups and Conventions Close

Group Name: Gold Key Solutions

Attendees: 12

Arrival Date: 3/14/2005 Departing: 3/31/2006 235

Notes: Golf Tournament

Group Contact: Newton Gore

Meeting Planner: Karen Clancy Aguirre

Group Manager: Charles Emerson ...

Sales Manager: Fred Jensen ...

Save Delete Clear

Linked Documents:

Link	Description
Meeting Planners	
Resume	

Maintain Link

☐ Plain Paper ☒ Letterhead Printer Icon

Manage Group Logbook Entries

Event and Meeting Schedule:

Date	Start	End	What	Where
3/23/2005	03:00 PM		Arrival/Check in	Lowel Level - Californi
3/23/2005	05:30 PM		Cocktails/Dinner	Epiphany Suite
3/24/2005	08:00 AM		Breakfast	Epiphany Suite
3/24/2005	09:00 AM		Meeting	Balboa Ballroom
3/24/2005	10:30 AM		Break	Balboa Ballroom
3/24/2005	12:30 PM		Lunch	Epiphany Suite
3/24/2005	02:00 PM		Meeting	Balboa Ballroom
3/24/2005	03:30 PM		Break	Balboa Ballroom
3/24/2005	04:00 PM	06:00 PM	Welcome and check In	Pool Terrace
3/24/2005	05:30 PM		Cocktails/Dinner	Epiphany Suite
3/25/2005	08:00 AM		Breakfast	Epiphany Suite

Event Date:

Start Time:

End Time:

Event Name:

Venue or Location: ...

Save Delete Clear

The **Linked Documents** can be used in order to link pictures of the Meeting Planner, VIP's or even the Resume. (Please see Contacts chapter to learn how to Maintain Links).

On the **Event and Meeting Schedule** you can set up the daily activities that a group is conducting during their stay. This is done by choosing the times, typing the event name and the Venue or Location. Please see below:

Groups and Conventions - Nuria Candel - Tuesday, March 14, 2006

Groups and Conventions

Group Name: Gold Key Solutions
Attendees: 12
Arrival Date: 3/14/2005 Departing: 3/31/2006 235
Notes: Golf Tournament

Group Contact: Newton Gore
Meeting Planner: Karen Clancy Aguirre
Group Manager: Charles Emerson
Sales Manager: Fred Jensen

Save Delete Clear

Plain Paper Letterhead

Manage Group Logbook Entries

Linked Documents:

Link Description	Maintain Link
Meeting Planners	
Resume	

Event and Meeting Schedule:

Date	Start	End	What	Where
3/23/2005	03:00 PM		Arrival/Check in	Lowel Level - Californi
3/23/2005	05:30 PM		Cocktails/Dinner	Epiphany Suite
3/24/2005	08:00 AM		Breakfast	Epiphany Suite
3/24/2005	09:00 AM		Meeting	Balboa Ballroom
3/24/2005	10:30 AM		Break	Balboa Ballroom
3/24/2005	12:30 PM		Lunch	Epiphany Suite
3/24/2005	02:00 PM		Meeting	Balboa Ballroom
3/24/2005	03:30 PM		Break	Balboa Ballroom
3/24/2005	04:00 PM	06:00 PM	Welcome and check In	Pool Terrace
3/24/2005	05:30 PM		Cocktails/Dinner	Epiphany Suite
3/25/2005	08:00 AM		Breakfast	Epiphany Suite

Event Date: 3/23/2005
Start Time: 02:20 PM
End Time: 06:00 PM
Event Name: Guest Registration
Venue or Location: Amargosa Room, Balboa Ballroom, Epiphany Suite, Lowel Level - California, North Portico

Save

You can then get a print out with all the group activities and group details by clicking on the printer to the right of the screen.

The Concierge Assistant Print Preview

PDF & Email Create PDF Close

Gold Key Solutions

Group\Convention Details

Group Name: Gold Key Solutions
Attendees: 12
Arrival Date: Monday, March 14, 2005
Departure Date: Friday, March 31, 2006
Group Contact: Newton Gore
Meeting Planner: Karen Clancy Aguirre
Group Manager: Charles Emerson
Sales Manager: Fred Jensen
Notes: Golf Tournament

Individual Events Meeting Schedule:

Date	Start	End	What	Where
Wed, 3/23	03:00 PM		Arrival/Check in	Lowel Level - California Room
Wed, 3/23	05:30 PM		Cocktails/Dinner	Epiphany Suite
Thu, 3/24	08:00 AM		Breakfast	Epiphany Suite
Thu, 3/24	09:00 AM		Meeting	Balboa Ballroom
Thu, 3/24	10:30 AM		Break	Balboa Ballroom
Thu, 3/24	12:30 PM		Lunch	Epiphany Suite
Thu, 3/24	02:00 PM		Meeting	Balboa Ballroom
Thu, 3/24	03:30 PM		Break	Balboa Ballroom
Thu, 3/24	04:00 PM	06:00 PM	Welcome and check In	Pool Terrace
Thu, 3/24	05:30 PM		Cocktails/Dinner	Epiphany Suite
Fri, 3/25	08:00 AM		Breakfast	Epiphany Suite
Fri, 3/25	09:00 AM		Golf/Coff Terrace/Pick up From	North Portico
Fri, 3/25	12:00 PM		Wives Luncheon	Pool Terrace
Fri, 3/25	06:00 PM		Dinner/Dancing	Pool Terrace
Sat, 3/26	08:00 AM		Breakfast/Meeting	Balboa Ballroom

5.1.2 To **Delete Groups** that have departed, you can just go to the main Groups Screen and click the button at the bottom of the page.

Groups and Conventions - Nuria Candel - Tuesday, March 14, 2006

Groups and Conventions

3/14/2006 ☐ Show ALL Groups

Add a Group

Group Name	Attendees	Arrival Date	Departure Date	Group Contact	Group Manager	Notes
BMW Motorrad - USA	50	3/8/2006	3/14/2006	Matt Loew	Jeanne Mills	Super VIP Group!!!!
Denis's B-day	150	3/9/2006	3/14/2006			
Gold Key Solutions	12	3/14/2006	3/31/2006	Newton Gore	Charles Emerson	Golf Tournament
IBM	100	6/6/2005	6/5/2008	Darin Hubbard	Charles Emerson	Fam trip for VP's

Delete Departed Groups

5.1.3 Working with Group Logbook entries

Many times when a Group is in-house, you need to make all the logbook entries under each individual guest (VIP Transportation Requests, Golf Tee Times, Spa Appointments etc) but still want to be able to view everything that a specific Group is doing.

A. How to attach a Group to a Logbook entry:

Once the group has been created on the OTHERS tab, pull up an existing reservation or just make any new Logbook entry as usual. Use your drop down menu on the “Group Name” field and just click on the name of the Group.

The Concierge Assistant Logbook Manager - Nuria Candel - Tuesday, March 14, 2006

Concierge Logbook Manager

Logbook Entry Types:

- Airline Reservation
- Amenity In-house
- Amenity Order Outside
- AYS (Guest Request) Log
- Beauty Services
- Bought Tickets
- Breakfast in the Park
- Brunch With Santa
- Business Center/AV
- Call Back Log
- Car Rental
- Contractor Check List
- Dining Reservations
- Employee Tickets
- Event Tickets
- Fax Log Sheet
- Fax/Photo Copies
- Fishing / Boats
- Floral

Last Name: ✓

First Name: ✓

Room Number:

Arrival Date: 17:30

Reference Date: 17:30

Type of Entry:

Entry is Complete: ☒ Canceled ☐ Pending ☐

Guest Notification:

Group Name:
Geri Ruiz B-day
Giovani B-day Party
Gold Key Solutions
Hewlett Packard
IBM
IHO Jeff Cohen
Jenni's B-day Party
Jill's

Descriptive Text:

Spa/Location: AVE
Confirmed Time: 5.30
Description of Service: Massage - Couples
Female/Male Masseuse: Female
Price: \$150
Confirmed With: James
(INC 2006/03/13 20:14)

Close
Clear
Delete
Save and Repeat
Save
Clone This Entry
Show Messages

Current Logbook Notes: 250

Then Save and Close.

Please note that if you “Clone the Entry” or use the “Save and Repeat” options, the name of that Group will remain attached to the new Logbook entry.

B. How to see what a Group is doing.

When a meeting planner needs to see all the Logbook entries that belong to a Group, simply go back the main Logbook screen and Select By “Group”, then choose the name of the Group from the drop down menu as shown below:

The Concierge Assistant - Nuria Candel - Tuesday, March 14, 2006

Contacts Events **Logbook** Messages Others Profiles Administration

Select by

- ☐ Concierge
- ☐ Room Number
- ☐ Logbook ID
- ☒ Group
- ☐ Last Name
- ☐ First Name
- ☐ Element
- ☐ Refer Date
- ☐ Entry Date
- ☐ Arrival Date
- ☐ None

Sort by

Reference Date and Name

Select Date Entered Time Frame

- ☐ Recent
- ☐ Last 7 Days
- ☒ All Dates

☐ Open ☐ Closed ☒ All

Category (Opt): X

English Select Group Name: Gold Key Solutions

☐ Do Not Include 'Cancelled' Entries **Today**

Exit Add Logbook Entry Due and Overdue Search

Last Name	First Name	Room #	Category	Notify	Refer Date	Time	Who	Description
Bianchi	Rosario	343	Transportation	Email	2006/01/11	08:00 am	NC	Name of Company: Aventura LimousinesTime:
Sutton	Renee	4343	Transportation	Email	2006/01/11	12:30 pm	NC	Name of Company: Aventura LimousinesTime:
Loew	Matt		Spa		2006/01/12	10:30 am	NC	Spa/Location: AvedaConfirmed Time: 10.30a
Elmendorp	Jeroen	345	Amenity In-house		2006/01/16		NC	Time to be dvlid: 3pmRequested by: GMT
Elmendorp	Jeroen	345	Dining Reservations	Email	2006/01/17		NC	Requested time: 7 to 9pmRestaurant: Ebisu R
Delacy	Karl		Package		2006/01/19		NC	Package type: boxCourier: upsTracking #: 36
gks 1			Transportation		2006/01/21		NC	Name of Company: Aventura LimousinesTime:
Loew	Matt		Spa		2006/01/24	10:30 am	NC	Spa/Location: AvedaConfirmed Time: 10.30a
Hoffman	Richard	3432	Golf	Email	2006/02/03		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Hammock	Julie	232	Golf	Email	2006/02/10		NC	Golf Course: Don Sherwood Golf & Tennis Wc
Anderson	David	343	Golf	Email	2006/02/16		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Loew	Matt		Event Tickets		2006/02/16	08:00 pm	NC	Event: Sheryl Crow Soak up the Sun TourVer
Madrigal	George	2324	Golf	Email	2006/02/17		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Loew	Matt		Dining Reservations		2006/02/25	08:00 pm	NC	Requested time: .Restaurant: BiceAddress: 31
Roberts	Andrew	344	Amenity In-house		2006/03/01		NC	Time to be dvlid: 3pmRequested by: gmType c
Zilber	Adam	3435	Golf	Email	2006/03/01		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Harris	Jean	454	Spa	Email	2006/03/02		NC	Spa/Location: AvedaConfirmed Time: 10amD
Roberts	Andrew	344	Package		2006/03/02		NC	Package type: boxCourier: upsTracking #: 32
Roberts	Andrew	344	Golf	Email	2006/03/03		NC	Golf Course: Gleneagles International Golf Co
Rivera	Paulo	454	Snorkeling/Scuba Div	Email	2006/03/07		NC	Name of Company: Scuba AdventuresType of

30 Entries were selected

The system will show all the entries belong to that Group specifically. You can now sort by date, last name or any way you want. As usual the color coding will allow you to know what you need to do next and complete all Red and Blue/Green entries.

If you would like to have a list of ONLY one specific category, just choose your Category on the Optional box.

The Concierge Assistant - Nuria Candel - Tuesday, March 14, 2006

Contacts Events Logbook Messages Others Profiles Administration

Select by
☐ Concierge
☐ Room Number
☐ Logbook ID
☒ Group
☐ Last Name
☐ First Name
☐ Refer Date
☐ Entry Date
☐ Arrival Date
☐ None
☐ Element

Sort by
 Reference Date and Name

Select Date Entered Time Frame
☐ Recent ☐ Last 7 Days ☒ All Dates

Category (Opt): Golf

Select Group Name: Gold Key Solutions

English

Do Not Include 'Cancelled' Entries **Today**

Last Name	First Name	Room #	Category	Notify	Refer Date	Time	Who	Description
Hoffman	Richard	3432	Golf	Email	2006/02/03		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Hammock	Julie	232	Golf	Email	2006/02/10		NC	Golf Course: Don Sherwood Golf & Tennis Wc
Anderson	David	343	Golf	Email	2006/02/16		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Madrigal	George	2324	Golf	Email	2006/02/17		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Zilber	Adam	3435	Golf	Email	2006/03/01		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Roberts	Andrew	344	Golf	Email	2006/03/03		NC	Golf Course: Gleneagles International Golf Co
Cross	Kevin	575	Golf	Email	2006/03/08		NC	Golf Course: Gleneagles International Golf Co
Doyle	Liam	454	Golf	Email	2006/03/09		NC	Golf Course: American Express Golf CardConfi
Rodriguez	Nacho	454	Golf	Email	2006/03/09		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Deville	Robert	4485	Golf	In Person	2006/03/10		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Todino	Barbara	454	Golf	Email	2006/03/14		NC	Golf Course: Fleming 9 Hole Golf CourseConfir

11 Entries were selected

Now you can print a Report or even PDF and Email to the Meeting Planner using the Printer on the left hand side of the screen. This is what you will see:

The Concierge Assistant Print Preview

Create RTF PDF & Email Create PDF Close

3/14/2006 10:57 am

The Gold Key Resort and Hotel
 Concierge Department
 818-865-0006 Fax 818-597-2389

Page: 1
 Nuria Candel

Concierge Logbook List - Using Current File

Where Group Name is Gold Key Solutions And Category is Golf And Date Range is All Dates, Sorted by Reference Date, Name

Done	Last Name	First Name	Room #	Category	Refer Date	Time	Who	Description
<input checked="" type="checkbox"/>	Hoffman	Richard	3432	Golf	2006/02/03		NC	Golf Course: Fleming 9 Hole Golf Course Confirmed Tee Time: 9am # of Players: 2 Green Fees: \$125 Telephone #: (415) 661-1865
<input checked="" type="checkbox"/>	Hammock	Julie	232	Golf	2006/02/10		NC	Golf Course: Don Sherwood Golf & Tennis World Confirmed Tee Time: 9am # of Players: 2 Green Fees: \$150 Telephone #: (415) 989-5000
<input checked="" type="checkbox"/>	Anderson	David	343	Golf	2006/02/16		NC	Golf Course: Fleming 9 Hole Golf Course Confirmed Tee Time: 9am # of Players: 2 Green Fees: \$250 Telephone #: (415) 661-1865
<input checked="" type="checkbox"/>	Madrigal	George	2324	Golf	2006/02/17		NC	Golf Course: Fleming 9 Hole Golf Course Confirmed Tee Time: 9am # of Players: 2 Green Fees: comp Telephone #: (415) 661-1865

C. Printing Individual Confirmations

This is very useful when the meeting planner would like to include those confirmations on the Welcome Packet of each attendee. Select the Group and the Category that you want to print. Then click on the Printer in the middle of the screen.

The Concierge Assistant - Nuria Candel - Tuesday, March 14, 2006

Contacts Events Logbook Messages Others Profiles Administration

Select by
☐ Concierge ☐ Last Name ☐ Refer Date
☐ Room Number ☐ First Name ☐ Entry Date
☐ Logbook ID ☐ Arrival Date
☒ Group ☐ Element ☐ None

Sort by
Reference Date and Name

Select Date Entered Time Frame
☐ Recent ☐ Last 7 Days ☒ All Dates

Category (Opt): Golf

Select Group Name: Gold Key Solutions

Printer icon highlighted

Last Name	First Name	Room #	Category	Notify	Refer Date	Time	Who	Description
Hoffman	Richard	3432	Golf	Email	2006/02/03		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Hammock	Julie	232	Golf	Email	2006/02/10		NC	Golf Course: Don Sherwood Golf & Tennis Wc
Anderson	David	343	Golf	Email	2006/02/16		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Madrigal	George	2324	Golf	Email	2006/02/17		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Zilber	Adam	3435	Golf	Email	2006/03/01		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Roberts	Andrew	344	Golf	Email	2006/03/03		NC	Golf Course: Gleneagles International Golf Co
Cross	Kevin	575	Golf	Email	2006/03/08		NC	Golf Course: Gleneagles International Golf Co
Doyle	Liam	454	Golf	Email	2006/03/09		NC	Golf Course: American Express Golf CardConfi
Rodriguez	Nacho	454	Golf	Email	2006/03/09		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Devilme	Robert	4465	Golf	In Person	2006/03/10		NC	Golf Course: Fleming 9 Hole Golf CourseConfir
Todino	Barbara	454	Golf	Email	2006/03/14		NC	Golf Course: Fleming 9 Hole Golf CourseConfir

11 Entries were selected

The system will give you ONE page per Logbook entry:

The Concierge Assistant Print Preview

PDF & Email Create PDF Close

1/11

Gold Key Solutions

Confirmation for: **Richard Hoffman**
Arriving: **Thursday, February 02, 2006**

Your Request: **Golf**
For This Date: **Friday, February 03, 2006 .**

Golf Course: **Fleming 9 Hole Golf Course**
Confirmed Tee Time: **9 am**
of Players: **2**
Green Fees: **\$125**
Telephone #: **(415) 661-1565**
Confirmed With: **Anne**

Additional Information: A 48 hour cancellation is necessary to avoid any penalties. Please allow 20 minutes prior to your scheduled tee time for check in.

Sincerely,