



BELMOND

HMS Manual: Reservations

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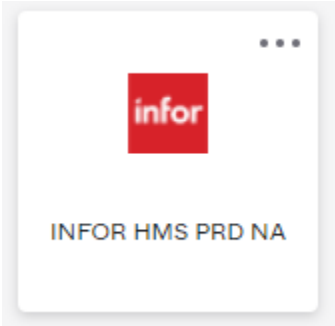
[Proforma Invoices](#)

[Rate Information](#)

Getting Started

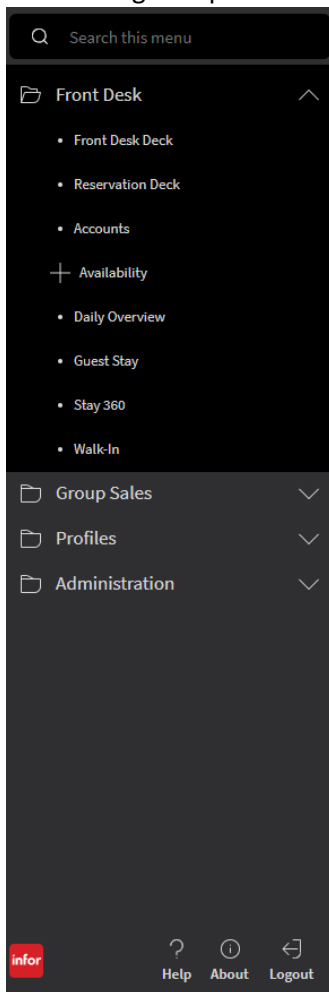
Logging In

- You will log in using OKTA. The system will let you log in with your email address and computer password (Single Sign on)



Logging Out

- Find the logout option from the main menu drop down menu

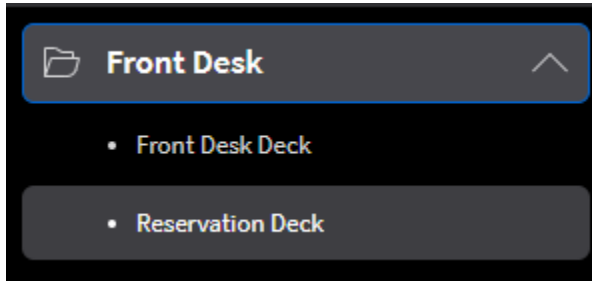


Navigating to the Reservation Deck

- On the **Start Center** page, click the three lines on the upper left hand corner to take you to the main menu

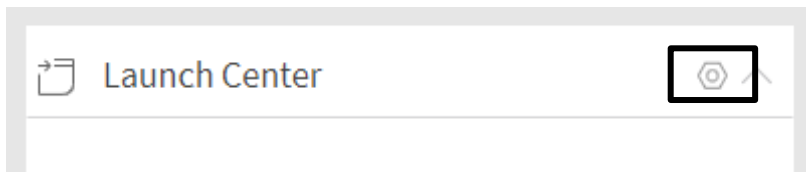


- You can expand the **Front Desk Tab** and the list will have the Reservation Deck

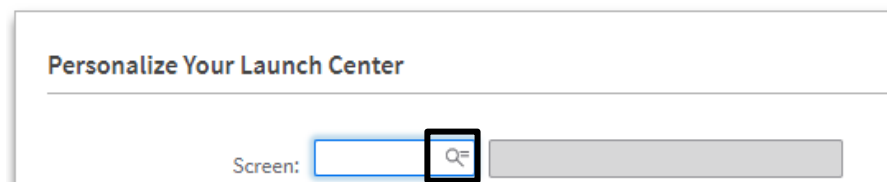


Launch Center

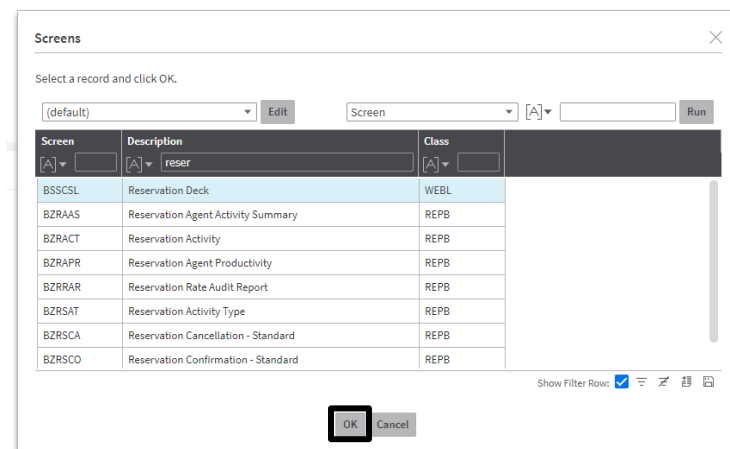
The Launch Center is a section on your Start Center screen that you can add shortcuts to commonly visited screens. To add a shortcut, click on the bolt icon:



- This will open a page where you can add the shortcuts. Click the spyglass icon to see the list of options



- Once you have selected the screen you want to add, click OK.

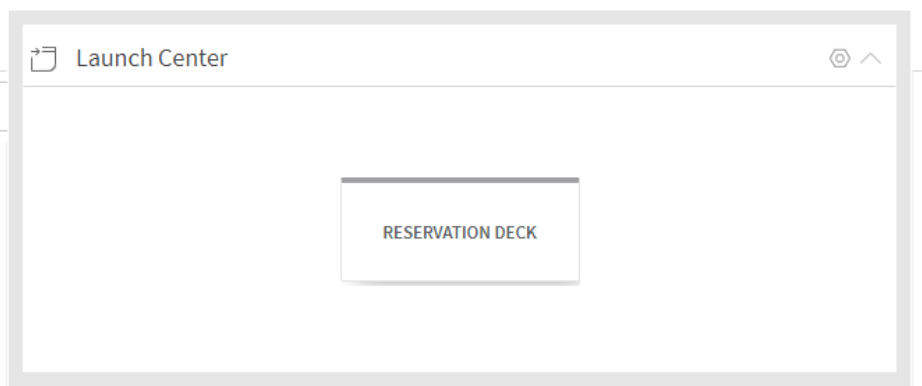


- This will take you back to the Personalize Your Launch Center Screen, where you can click Submit to save your changes

Personalize Your Launch Center ✕

Screen:	BSSCSL <input type="text"/>	Reservation Deck	Global Default: <input type="checkbox"/>
Screen:	<input type="text"/>		
Screen:	<input type="text"/>		
Screen:	<input type="text"/>		
Screen:	<input type="text"/>		
Screen:	<input type="text"/>		
Screen:	<input type="text"/>		
Screen:	<input type="text"/>		
Screen:	<input type="text"/>		
Screen:	<input type="text"/>		
Screen:	<input type="text"/>		

-
- Now you will see your shortcut in your Launch Center



-

Checking Availability

Search Criteria

- Click New Record button from the **Guest Stay Screen**



- Enter dates requested (MM/DD/YYYY) or choose from the calendar
- Adjust the number of **Adults** and **Children** as needed. The rates on the next screen will include extra person fees, so the policies of the hotel regarding ages of children should be followed when completing **Children** field
- Click open **Rate Plan** in order to begin searching for rates and availability

Arrival Date: * 01/24/2025

Nights:

Departure Date: * 01/25/2025

Adults: * 1

Children:

SYN Child Count: 0

Children Ages 0-2: 0

Children Ages 3-11: 0

Children Ages 12-17: 0

Rate Plan:

- ⚡ **Note:** When searching availability for Non-Peruvians at Peru hotels, select Exempt in the Tax Status field before opening Rate Shop to quote rates without the 18% tax

Arrival Date: * 24-01-2025

Nights:

Departure Date: * 25-01-2025

Do Not Move Reason:

Tax Status: **Exempt**

Confidential Rate:

- The **Rate Shop** window will pop-up. Under **Search Criteria** you can filter different categories and narrow down your results.
 - ⚡ **Room Types:** You can open up the screen and tick “Select” box to select all room type.
 - ⚡ **Rate plan:** You can search for certain rate plans in this field
 - ⚡ **Sales Strategy:** The Search Criteria screen is pre-set to return all rates that are available to the public (same as the website). However, you can change the set of rates that are returned by using the drop down “Sales Strategy” tool. If you have any Rate Plans already in the filter, the Sales Strategy will not work
 - ⚡ [How to find Consortia Rates](#)
 - ⚡ [How to find Group and Corporate Rates](#)
- Once you have entered any desired search criteria, hit **Search**

Rate Shop

Dates * Mon, 04/10/2023 - Fri, 04/14/2023

Nights * 4

Guests 2 Adults

Sales Strategy: Public Rates

Room Type Categories:

Room Types:

Rate Plans:

Room Type for Charge:

Group:

Organization:

Primary Booking Agency:

Promotion:

Reservation Template:

Currency: US Dollar

Convert from Property Currency Show Restricted Sell Options

Search Results

- If the room and rate display on this screen, it is available to offer
- The number of rooms available shows how many rooms are left in inventory. Hover over the rate code to view the name of the Rate Plan and description
- The numbers in parentheses show the number of overbookings at the hotel level and per room category
- Use the - + buttons on the left of the room type to expand/condense the rate list

Rate Shop

Dates * Mon, 11/04/2024 - Thu, 11/07/2024

Nights * 3

Guests 2 Adults

Sales Strategy: Public Rates

Room Type Categories:

Room Types:

Rate Plans:

Room Type for Charge:

Group:

Organization:

Primary Booking Agency:

Promotion:

Reservation Template:

Currency: US Dollar

Convert from Property Currency Show Restricted Sell Options

Room Rates

Rate Plan	11/04/2024 Monday	11/05/2024 Tuesday	11/06/2024 Wednesday
Current Rates	--	--	--
■ CAP: Cap Juluca <input type="button" value="i"/>	83 (0)	74 (0)	68 (0)
▣ DLKB <input type="button" value="h"/>	4 (7)	5 (8)	5 (8)
UGRBAR <input type="button" value="i"/>	\$1,260.00	\$1,269.00	\$1,275.00
PKGGOU: A Taste of ... <input type="button" value="h"/>	\$1,959.00	\$1,269.00	\$1,275.00
PKGCEL: Celebrate in ... <input type="button" value="h"/>	\$2,500.00	\$1,269.00	\$1,275.00
PKGGTO: From Island to Island <input type="button" value="h"/>	\$2,144.00	\$1,269.00	\$1,275.00
PKGSPA: Spa Retreat <input type="button" value="h"/>	\$1,710.00	\$1,269.00	\$1,275.00

- Click on the “i” next to the rate code to see the rate description, average daily rate and total, and deposit and cancellation policies

Rate Shop

Dates *
 Nights *
 Guests

Room Rates

Rate Plan	25-NOV-2025 Tuesday	26-NOV-2025 Wednesday	27-NOV-2025 Thursday
Current Rates	--	--	--
<input checked="" type="checkbox"/> SPM: Splendido Mare	8	9	11
<input type="checkbox"/> JRSB	3	3	3
UGRBAR: Room with Breakfast	€800,00	€800,00	€820,00
PKGCTP: Grand Tour	€720,00	€720,00	€738,00

Rate Information

Splendido Mare | D - Junior Suite Sea View/Balcony
UGRBAR: Room with Breakfast

Room with Breakfast

Luxury accommodation, daily breakfast

Package Inclusions

- Daily Breakfast
 - Daily Breakfast Adult Price
 - Daily Breakfast Child 3-11 Price
 - Daily Breakfast Child 12-17 Price
- Minibar Non-alcohol Beverage
 - Minibar BAR Beverage Non-Alcohol
 - Minibar BAR Beverage Non-Alcohol Allowance

Average Daily Rate	806,67 EUR
Average Rate With Resort Fee	806,67 EUR
Total Resort Fees	0,00 EUR
Total Taxes	272,00 EUR
Total Price For Stay	2.692,00 EUR

Policies

Guarantee

CC/SE/30

A valid credit card is requested at booking. As the cancellation deadline approaches, the card will be preauthorized for the reserved amount. Bookings exceeding EUR 25.000 require a 50 percent non-refundable deposit 30 days prior to scheduled arrival date.

Cancellation

12PM/3D/FULLSTAY/TAX/SE/30D

Cancel 12pm 3 days prior to arrival or pay full stay plus tax. Bookings over EUR 25.000 cancel 30 days or pay full stay

Advance Deposit Cancellation

12PM/3D/FULLSTAY/TAX/SE/30D

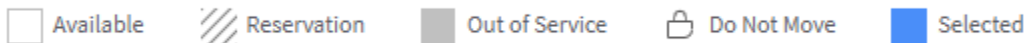
Cancel 12pm 3 days prior to arrival or pay full stay plus tax. Bookings over EUR 25.000 cancel 30 days or pay full stay

Room Details

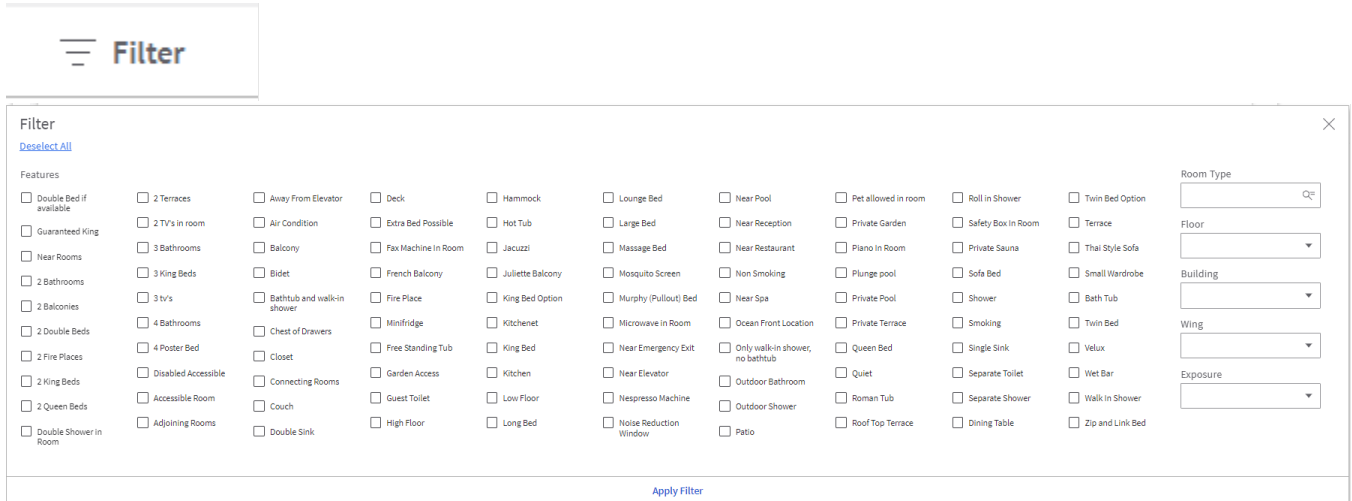
You can check if specific rooms are available during the requested dates by clicking on Room Details next to the property's name.



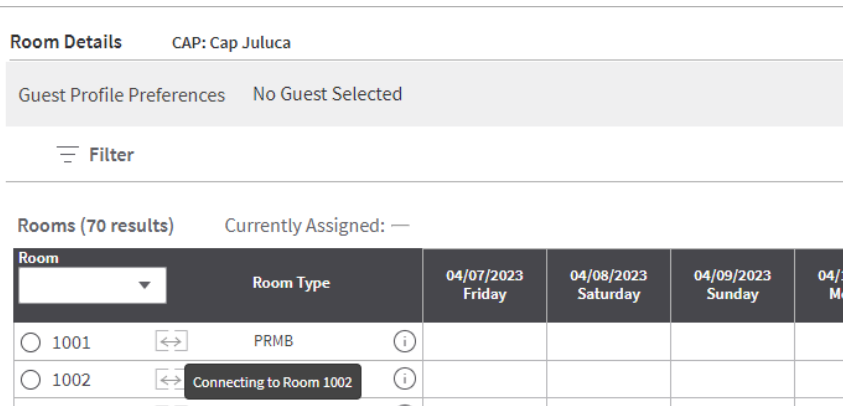
- Room Details will show every room in the hotel during the requested dates. The legend at the bottom of the screen shows what the patterns mean



- You can filter what rooms return by selecting **Filter** in the top left corner

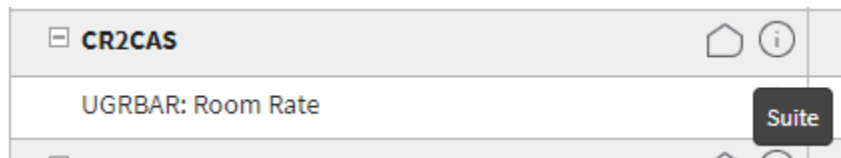


- The arrows next to a room number means it is a connecting room. Hover over the arrow to see which room it connects to



Component Rooms

- Component Rooms are units that are made up of multiple rooms and/or suites. When searching for availability, Component Rooms will have the component icon next to the category name.



- You will book Component Rooms like you would a normal room or suite. The system will automatically pull the rooms that make up a component out of inventory. Once the booking is confirmed, the system will auto-assign the component room number

- Rooms that are part of a Component Room will have a component icon next to it in the Room Plan

1401		1CAS	
140102		CR2CAS	
1402		DLXT	

- If a reservation for a singular room has been assigned to a room that makes up a component room, an arrow will occupy the component room in the room plan.

601		1CAS		
60102		CR2CAS		
602		DLXT		

- If a reservation for a component room has been assigned in the room plan, an arrow will occupy the rooms that make up the component room.

601		1CAS		
60102		CR2CAS		
602		DLXT		

- **Note:** If the component room category is not available, you cannot book the rooms separately. Any component category must be booked only as the component.
 - **Example:** If CR2CAS (made up of 1CAS and DLXT) is not available, you cannot book the 1CAS and DLXT as two separate reservations and assign the rooms.
 - **Exception:** Cap Juluca Villas can sometimes be offered when the component room category is sold out. See SOP here: [Checking Availability for Closed Out CAP Villas.docx](#)

Viewing Rooms and Rates that are Not Available

- If the rate or room type you've searched does not appear, then you can tick "Show Restricted Sell Options", then click the Search button to view what is not available to sell.
- If you hover over the rate that is in red, then you can see the restriction that is in place.

Rate Shop

Dates * Nights * Guests

Room Rates

Rate Plan	11/27/2024 Wednesday	11/28/2024 Thursday
Current Rates	--	--
<input checked="" type="checkbox"/> CAP: Cap Juluca	93	92
<input type="checkbox"/> DLKB	11	11
UGRBAR	\$1,675.00 ⚠	\$1,705.00 ⚠
<input type="checkbox"/> DLXT	2	
UGRBAR	\$1,775.00 ⚠	\$1,805.00 ⚠

- If trying to ascertain if there is a minimum length of stay in place, it is best to include UGRBAR in the "Rate Plans" field to reduce the number of results that return.
- If you want to confirm something that is restricted, tick the "Rate Override" box. Make a note in the reservation stating why you booked it and who authorized it

Rate Override:

Quoting & Confirming Selection

- Highlight the rate plan you'd like to quote (all nights should be highlighted in blue)
- Click **Update Stay** to have the rates populate in the Stay Summary to the right. This will show you the average nightly room rate, total room rate without taxes and then the **Total Price for Stay** is all room nights, add-ons, and all taxes

- Confirm the selection by **Complete** and return to the reservation screen
- **Note:** You should quote using the same rate code for the entire stay. If a reservation requires multiple rate codes, it will need to be split into separate reservations. You cannot confirm a singular reservation with multiple rate codes

Rate Shop
↑ ×

Dates *
 Mon, 04/10/2023 - Fri, 04/14/2023

Nights *
 4

Guests
 2 Adults

Search

Room Rates
⏪ ⏩

Rate Plan	04/10/2023 Monday	04/11/2023 Tuesday	04/12/2023 Wednesday	04/13/2023 Thursday
Current Rates	\$1,595.00	\$1,895.00	\$1,895.00	\$1,815.00
CAP: Cap Juluca	66	66	68	71
DLKB	2	2	2	2
UGRBAR: Room Rate	\$1,595.00	\$1,895.00	\$1,895.00	\$1,815.00
PKGGOU: A Taste of ...	\$2,294.00	\$1,895.00	\$1,895.00	\$1,815.00
PKGCEL: Celebrate in ...	\$2,561.00	\$1,895.00	\$1,895.00	\$1,815.00
PKGOTO: From Island to Island	\$2,443.00	\$1,895.00	\$1,895.00	\$1,815.00
PKGSPA: Spa Retreat	\$1,820.00	\$1,895.00	\$1,895.00	\$1,815.00
PRMB	21	21	21	21
PRMT	5	5	5	5
JRSB	18	18	18	18
JRST	1	1	1	1
1STB	8	8	8	8
1CAS	2	2	2	2

>> Stay Summary
↑ ×

Average Daily Rate: \$1,800.00 USD

Total Rate: \$7,200.00 USD

Add-On Total: \$0.00 USD

Taxes: \$1,656.00 USD

[Auto Transfer Rules](#) | [Rate Details](#)

Total Price For Stay: **\$8,856.00 USD**

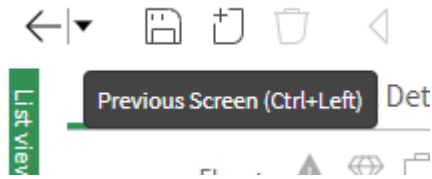
Update Stay

✓ Complete

[Show Legend](#) >

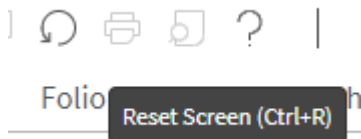
Exit a Reservation Without Saving/Lost Business Reasons

- Clicking **Previous Screen** will close the reservation and not save the reservation or changes that have been made

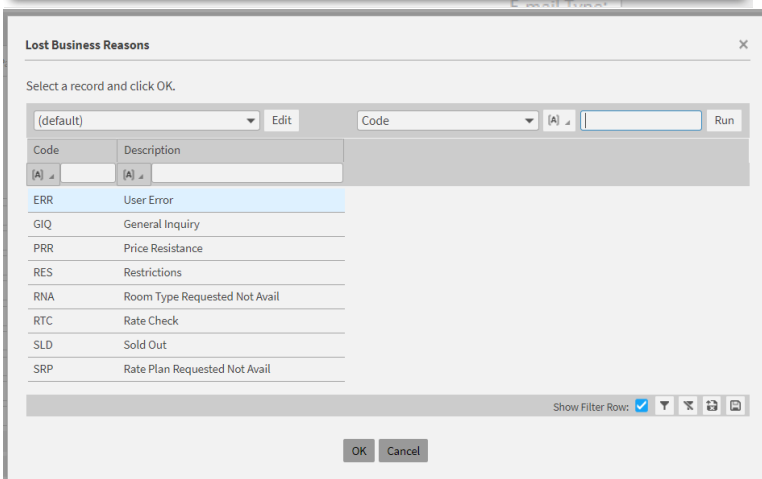
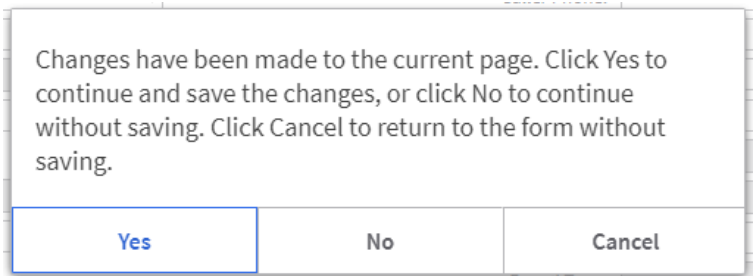


Exiting Rate Shop without Saving a Reservation

- Clicking “Cancel” will bring you back to Record View. In order to exit the current record, you will need to hit the “Reset Screen” button



- Hitting the “Reset Screen” button will bring you to the “Lost Business Reasons” screen. A reason should be noted as to why the reservation was not confirmed. The information on this form (including inquiry date, stay dates, market code, rate code, and lost business reason) can be generated into a report for review. Choose appropriate reason

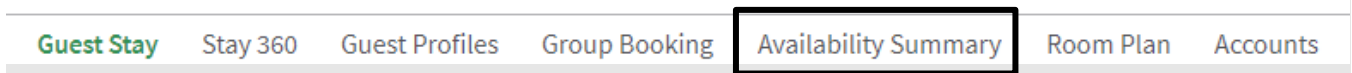
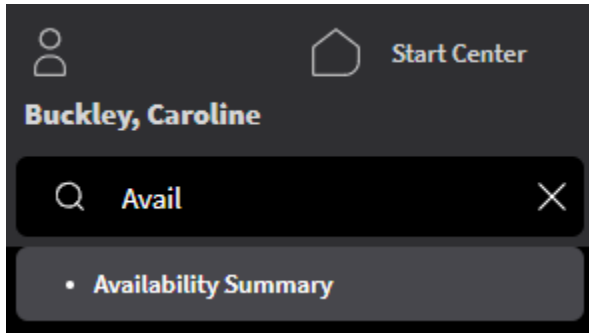


- Once reason is noted, the user will be brought back to the Start Center

Availability Summary

The Availability Summary shows information about overall hotel inventory. It displays the number and percentage of rooms available, the number of rooms sold, rooms that are out of order, as well as overbooking limits and opportunities.

- To get to the Availability Summary, you can search “availability summary” from the Start Center, or by clicking the Availability Summary tab at the bottom of the Guest Stay screen.



The Availability Summary screen is divided into two sections: Summary and Details. The Summary provides information on the availability at the property level. The Details section provides information on the availability by room type. Information is shown in both figures and percentages and most rows in the two sections can be expanded for a more detailed breakdown.

Summary							
		123 Count		123 Percentage of Total		123 Available	
	Jun 5, 2023		Jun 6, 2023		Jun 7, 2023		
	MONDAY		TUESDAY		WEDNESDAY		
Inventory	103	100 %	102	100 %	103	100 %	
Sold	46	45 %	61	60 %	68	66 %	
Available	57	55 %	41	40 %	35	34 %	
Opportunity	0	0 %	0	0 %	0	0 %	
Minimum Sellable	57	55 %	41	40 %	35	34 %	

Details													
		123 Count		* Overbooking Limit		123 Percentage of Total		123 Available		Suite Component		123 Phys	
	Jun 5, 2023		Jun 6, 2023		Jun 7, 2023								
Room Types	MONDAY		TUESDAY		WEDNESDAY								
DLKB - A - Deluxe Beachfront King Room	15	8	89 %	4	44 %	1	11 %						
DLXT - B - Deluxe Beachfront Twin Room	3	2	67 %	1	33 %	1	33 %						
PRMB - C - Premium Beachfront King Room	43	15	37 %	14	34 %	14	34 %						
PRMT - D - Premium Beachfront Twin Room	7	5	71 %	4	57 %	4	57 %						
JRSB - E - Beachfront Junior Suite King	26	19	73 %	20	77 %	17	65 %						
JRST - F - Beachfront Junior Suite Twin	1	1	100 %	1	100 %	1	100 %						

This is a helpful tool to see the inventory of the hotel and changes in occupancy, but should not be used to quote availability to a guest as it does not take into account restrictions such as minimum length of stays, arrival/departure requirements, etc.

Guest, Booking Agency & Organization Profiles

Guest

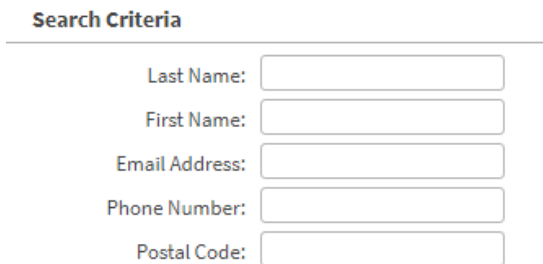
Profiles are required for all reservations, and it is not possible to create a reservation without including a guest profile. When making a new reservation, a profile search can be performed on the Rate Query Screen prior to checking availability or in the Reservations Screen as the reservation is being confirmed. They can also be managed by accessing the Profile Tab at the top of the HMS screen

- The system requires a profile search before creating a new profile. To search for a profile, click the **Guest Search** button next to Last Name Field



The screenshot shows a search form with the following fields: Title (dropdown menu), Last Name (text input with a person icon), First Name (text input), and Middle Name (text input). A dark button labeled "Guest Search" is positioned to the right of the First Name field. Partially visible text on the right side includes "Ali", "Last Ro", "Last C", and "Gues".

- Use the search fields to narrow your search. Note: The Loyalty Program number, Rewards number & rewards number do not have any effect on search result



The "Search Criteria" form contains five text input fields: Last Name, First Name, Email Address, Phone Number, and Postal Code.

-
- In order to search for profiles for guests who have stayed at any Belmond hotel, make sure the **CRM Search** option is selected before searching
- Choose the matching profile, which will populate contact information and preferences saved from the Belmond Profile. Verify all details are correct in the profile information and adjust as needed with changes
 - If you notice duplicate profiles, you can request for duplicates to be merged. Please find more information [here](#)
- If no guest profile is found, click New Profile and add the mandatory contact fields in the screen below. It is important to collect as much data as the guest is willing to provide. The mandatory fields are: First and Last name and Country.

Title:

Last Name:

First Name:

Middle Name:

E-mail Type:

E-mail Address:

Auto Email Folio:

Phone Type:

Phone Number:

Nationality:

Address Type:

Address:

Postal Code:

City:

State / Province:

Country:

Language:

- For full procedure of capturing and entering guests data, refer to the Belmond Data Standards article in Infohub
- If the guest who is staying is not making the reservation, enter the caller's contact details in the following field. Always capture the caller's name, phone number, and email address

Caller Name:

Caller Phone:

Caller Email:

- If a travel agent is making a reservation on behalf of a guest, add in the agent' B2B Contact OSC ID. More details on the procedure can be found here: [B2B Contact in HMS.docx](#)

Guest

Caller Name:

Caller Phone:

Caller Email:





B2B Contact OSC ID:

Children


When adding a child profile to a reservation, you will create an HMS profile as normal, but you must uncheck the "Add/Update Profile" field before saving the child's details. This ensures a full profile is not created and the data

will not be shared with other systems. For more information, please see here: [HMS underage guests policy.docx](#)

Records: 2 of 2 123

First Name: *

Profile ID: 

Middle Initial:

NRG:

Add/Update Profile:

No Post:

Email Type:

Email Address:

Reason for Stay:



Additional Guest Names

- Open a reservation
- Click **Guest Details** on the menu bar
- Search for the additional guest profile in the CRM by clicking on the silhouette. If a profile is not found, create a new profile

Guest Details


Primary Guest:

Title:



Last Name: *  

First Name: *

- If the additional guest has some of the same information as the lead guest (ie address) and does not have a profile created, you can duplicate the lead profile to bring their information to the new profile. Start by clicking on the arrow next to the **Profile ID**

Profile ID: 

Title:

Last Name: *  

First Name: *

- Once the profile is open, you can copy the profile by clicking on the Copy button. You can then add the additional guests name and any other information and save the profile. You will then need to add the guest to the reservation under Guest Details.
- You can change the primary guest by clicking on the arrow icon next to the primary guest name. Once clicked, a list of the additional guests will appear and you can choose from the list. You cannot make someone the primary guest if they are not already attached to the reservation.

The screenshot shows a reservation form with the following fields: Title (Mrs), Last Name (Bauer), First Name (Kate), and Middle Name. To the right, there are fields for Alias First Name, Last Room Occupie, and Guest Arrival Time. A button labeled 'Change Primary Guest' is highlighted with a red box. A red arrow icon is also visible next to the Last Name field. The word 'Booking' is written in red on the right side of the form.

Agencies

Travel Agencies

The Primary Booking Agency is the travel agency who is confirming the reservation. You can look up the agency from the **Primary Booking Agency** field at the top of the Record View. Click the spyglass to search for the agency

- Search for IATA and verify the mailing address of the agency with the agent

- ⚡ If the address matches the profile that returns, click "OK" and the agency will be attached to the reservation
- ⚡ If the address does not match the profile that returns, still attach this profile in the **Primary Booking Agency** field. Then, search for the agency with the matching IATA *and* mailing address in the **Secondary Booking Agency** field. This is a branch of the primary agency. This IATA number will have additional characters on the end, ie BR. Attach this agency as well.
- ⚡ More information on Branch Agencies can be found here: [HMS Booking Agencies Procedure.docx](#)

The screenshot shows a form with the following fields: Secondary Booking Agency (with a search icon) and Commission Percent (with a greyed-out input field).

- If you cannot find an agency during your initial search, please use the following procedure to search the OSC: [Lookup Organization or Travel Agency - InforHMS](#). You can access the Lookup Feature by double clicking the blue dot next to **Primary Booking Agency**

Corporate Organizations

Any time a corporate/negotiated rate is confirmed, the company must be added to the reservation in the Organization field. If you are unable to find an organization in a tenant, you can search and download the profile from the OSC lookup by double clicking the blue dot next to the Organization field

Stay

Group: Q=

Organization: Q=

Mandatory Reservation Fields

Follow steps under [Checking Availability](#) to search for rates & availability

The screenshot shows a 'Stay' reservation form with the following fields and values:

- Group: Q=
- Organization: Q=
- Primary Booking Agency: Q=
- Arrival Date: 02/04/2021 (Thu)
- Nights: 6
- Departure Date: 02/10/2021 (Wed)
- Adults: 2
- Children:
- Rate Plan: UVRBAR Q=
- Group Routing:
- Room Packages:
- Meal Plan:
- Rate Override:
- Source Of Business: Q=
- Secondary Source Of Business: Q=
- Track: Q=
- Room Type: JRSB Q=
- Reason for Stay:
- Room Type for Charge: Q=
- RTC Reason:
- Room: Q=
- Do Not Move:
- Do Not Move Reason:
- Confidential Rate:
- Average Room Rate: 950.00
- Total Room Rate: 5,700.00
- Add-On Total: 0.00
- Tax: 570.00
- Grand Total: 6,270.00
- Total Charges:
- Total Payments:

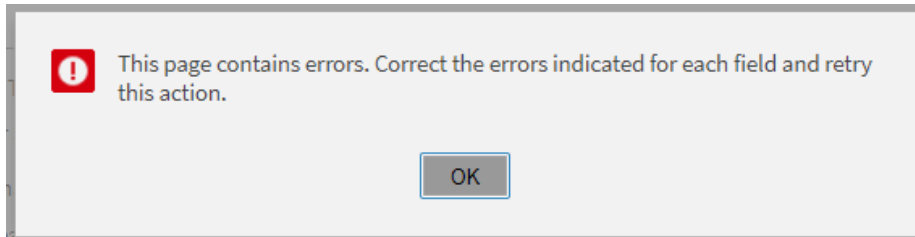
- Arrival and Departure Dates
- Rate Plan
- Source of Business:
 - In-house team: PDV (Voice (Telephone) Product) or PDE (Electronic (Email & Fax) Product)
 - CCO: CCV (Voice (Telephone) CRO) or CCE (Electronic (Email & Fax))
 - The front desk can use PDW (Walk-In Product) as well.
- Secondary Source of Business: Reservation agent should leave default PMS
- Room Type: Will auto populate based on room type selected in Rate Shop
- Room Type for Charge: Should be the same as Room Type, unless upgrading the room category.
- RTC Reason: Should use "Room Type Booked," unless it is an upgrade. See [Upgrading Room Category](#)
- Guest Profile: First Name, Last Name, and Country (as well as Country of Residence for EMEA2 & SA)
- Guarantee: Will be added in the screen below

The screenshot shows a 'Guarantee' form with the following fields and values:

- Guarantee Type:
- Deposit Due Date:
- Deposit Amount:
- Deposit Received:
- Recalculate Deposit:
- Post Advance Deposit:
- Card Number:
- Card Type:
- Expiration Date:
- Name on Card:
- Save to Profile:
- A/R Account: Q=
- A/R Account Number:
- Billing Reference:
- Paperwork Required:

- You will choose the guarantee type from the drop down menu.
 - **Bank Transfer Pending** - payment by wire/bank transfer

- **Credit Card** - credit card to guarantee
- **Deposit Pending** - deposit required for booking
 - i. **Note:** Deposits may run automatically with night audit. If there are any manual instructions required (e.g. splitting payments on multiple cards), use guarantee type Credit Card and notify team responsible for deposits.
- **Deposit** – to be used once a deposit has been taken on the reservation
- **Direct Bill** - payment by direct bill
- **Hold/Option** - courtesy holds/ pay by link
- **Manager Guarantee** - use with approval to confirm a reservation without payment
- **Waitlist** - waitlist bookings
- **Belmond Intercompany Transfer** - when another Hotel is paying for the stay
- **Group Delegate to Provide Credit Card details** - Group reservations – guest will provide their credit card for payment
- **Group Guarantee** - Group reservations – room & tax go to master account
- If you try to save the reservation and there are errors or mandatory fields missing, you will not be allowed to save the reservation. The following message will display



Additional Stay Details

- Track: If reservation should be noted as part of a particular promotion or being booked by a particular method, use the drop down to pick the appropriate Track Code (On-Property reservations should have a guide to when this information is completed)
- Reason for Stay: Choose from the list, when appropriate
- Room: Room number assigned
- DNM: Tick this box when you are allowed to guarantee the room number
- DNM Reason: If DNM is ticked, you must choose a DM reason
- Tax Status: Leave blank or mark as “Exempt” if the guest has tax exempt status
 - All reservations for foreigners staying at a Peru Hotel should be marked as “Exempt” as they are not responsible for the 18% tax

Confirming a Reservation

- Clicking the save icon will save the reservation and the reservation screen will stay open. The icon is in the top left corner



- Once confirmed, the confirmation number will appear at the top of the screen

Confirmation Number:

CRS ID:

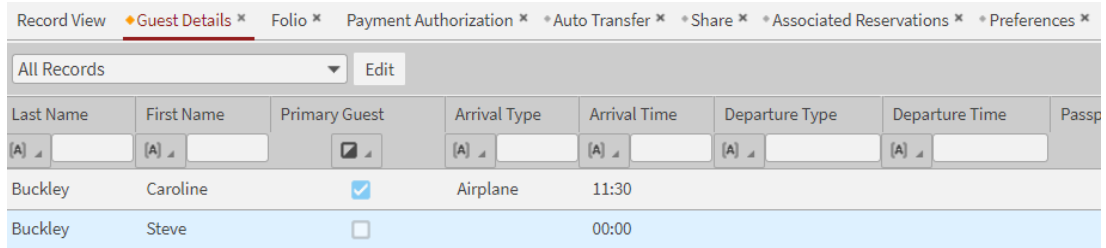
3rd Party ID:

- Send confirmation letter

Arrival Details

Users can add different arrival details for each guest attached to the reservation. You will need to make sure the guest's name that you are adding the information to is highlighted. If the arrival information is the same for all guests, just add it to the primary guest

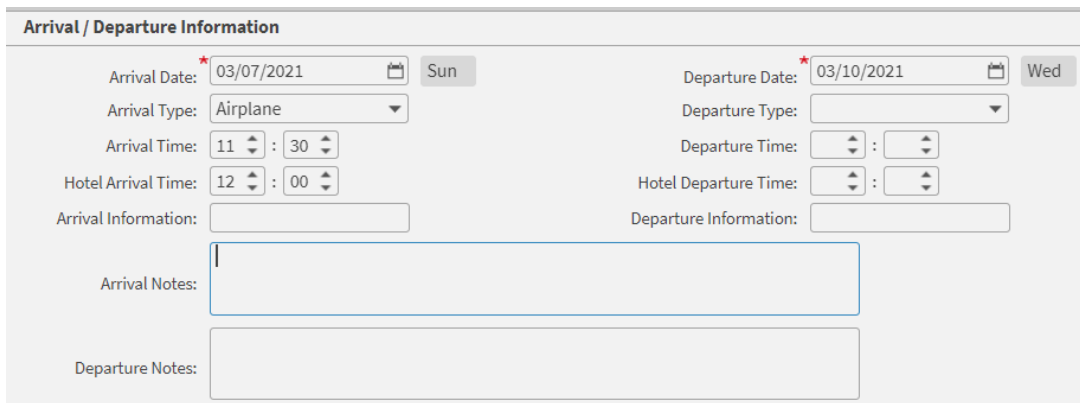
- Once added, it will display at the top of the **Guest Details** page



The screenshot shows the 'Guest Details' page with a table of arrival and departure information. The table has columns for Last Name, First Name, Primary Guest, Arrival Type, Arrival Time, Departure Type, and Departure Time. Two rows are visible: one for Caroline Buckley (Primary Guest) with an arrival time of 11:30, and one for Steve Buckley with an arrival time of 00:00.

Last Name	First Name	Primary Guest	Arrival Type	Arrival Time	Departure Type	Departure Time	Passp
Buckley	Caroline	<input checked="" type="checkbox"/>	Airplane	11:30			
Buckley	Steve	<input type="checkbox"/>		00:00			

- Arrival Date/Departure date: Adjust dates if guest is arriving/departing on another date that doesn't match arrival/departure date of reservation
- Arrival Type: Choose the method of transportation that the guest will be arriving on. If hotel is providing transportation services, then enter the information of the flight/ship/train that is being used previous to the Belmond service



The screenshot shows the 'Arrival / Departure Information' form. It includes fields for Arrival Date (03/07/2021, Sun), Departure Date (03/10/2021, Wed), Arrival Type (Airplane), Departure Type, Arrival Time (11:30), Hotel Arrival Time (12:00), Departure Time, Hotel Departure Time, Arrival Information, Departure Information, Arrival Notes, and Departure Notes.

Arrival / Departure Information

Arrival Date: * 03/07/2021 Sun
Departure Date: * 03/10/2021 Wed

Arrival Type: Airplane
Departure Type:

Arrival Time: 11 : 30
Departure Time: :
Hotel Arrival Time: 12 : 00
Hotel Departure Time: :
Arrival Information:
Departure Information:
Arrival Notes:
Departure Notes:

Notes

Use Notes to add free-form notes to a reservation. You can choose if you would like them to be internal or to have them printed on the confirmation letter/registration card. Any notes applicable to future stays can be saved to the guest profile.

- Enter the note in the text box and choose the category of note. Most common options will be “General Notes” or “Reservation Notes.” Tick where you would like the note to display.

Note Details

Note: Requesting to have sofa bed made up.

Source: []

Category: General Notes

Print on Confirmation:

Print on Registration:

Private Note:

Save to Profile:

Print on Housekeeping:

Display on Check-In:

- Once added, it will display at the top of the Notes page. You can edit previously added notes by highlighting

Record View * Guest Details * Folio * Payment Authorization * Auto Transfer * Share * Associated Reservations * Preferences * Tax Invoicing * Messages * Documents * Traces * Notes

Source	Category	Print on Confirmation	Print on Registration	Private Note	Note	Display on Check-In	Print on Housekeeping
[A]	[A]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[A]	<input type="checkbox"/>	<input type="checkbox"/>
Reservation	General Notes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Requesting to have sofa bed made up.	<input type="checkbox"/>	<input type="checkbox"/>

Important: Notes must be written without PII (Personal Identifiable Information). The note section should only be used when there is no applicable booking field. Please see [Profile & Reservations Notes](#) for more information.

Add-ons (Non-room items)

- These are non- room items or services that can be added to a guest’s stay. These can include both items that the guest will be charged for or complimentary
- Services to be used for arrival or during stay: transportation, meal plans
- Items to be placed in room: rollaways, cribs
- Click on the Add-on Icon in the top right of the screen.
 - The choice of add-on is either a meal plan or any other non- room item
 - Non-room bundles are a group of non-room items added together into a package (ie A Day Spa Package that does not include the guest room accommodations)
- For properties where tax set-up differs between F&B/POS and Room Revenue, non-room items are split into 2 components: there is a price component, and an allowance component. Both are added to the non-room bundle, to ensure the revenue is allocated to the right department, and that the credit is applied correctly.
 - Price component: the price component is used to deduct an amount from room revenue to cover some of the cost of the department who provides the specific service (e.g. F&B, SPA, resort services, etc.). This component always has a price set.
 - Allowance component: the allowance (sometimes called just "credit") is used to provide the guest with the credit they are entitled to, so that anytime a charge is posted to the folio, the credit absorbs that charge up to the maximum discount set in this non room item. This component always has a 0 price (because it should not post any price) and has a discount amount.
- If you are adding an add-on that should be charged to the guest (e.g. charge an extra bed, upsell), make sure the add-on attached is the "price component"
- If you are adding an add-on as a complimentary item or credit (e.g. add the 110 USD credit for suite life package) , make sure the add-on attached is the "allowance" (the one with 0 price).
- If you are adding an add-on that should be charged to the guest and also generate a credit to be used on POS posting (e.g. give an additional 100 USD F&B credit), make sure the add-ons attached are both the price component and the allowance.

Add-Ons 43655576-1 Stonebraker, Ms Shawn 304

Start Date	End Date	Item Type	Item	Quantity	Average Daily	Total Cost	Frequency	Pricing Control	Number of Visits	Status	Currency
02/20/2022	02/25/2022	Non-Room Item	Dining under the Stars	2	150.00	900.00	Once	Per Person		Valid	USD
02/20/2022	02/25/2022	Non-Room Item	Relaxing massage	2	63.33	380.00	Once	Per Room		Valid	USD

Pricing Details

Item Type: Department:

Items:

Quantity:

Start Date: End Date:

Folio:

Unit price:

Avg. Daily:

Total Cost:

Package Item:

Comment:

Posting Type: Pre Date Roll: Post Date Roll:

Frequency:

Pricing Control:

Foreign Currency Unit:

Foreign Currency Average Daily Cost:

Foreign Currency Total Cost:

Discount based on Pricing Control:

Max Discount Amount:

Status:

EOD Post:

Number of Visits:

Allowance:

Foreign Currency Allowance:

Discount:

Foreign Currency Discount:

Available:

Overbook:

Activity:

Trace

When a **Trace** is created, there will be a pop-up window that appears to the HMS user with an important message for the user. The user must click “Close” on the pop up message in order to view the reservation. This can be used to alert for a surprise, special attention, and important information.

- Select the Trace Delivery Method as “alert,” write a summary of the alert in “topic” and add more details as necessary in “trace details”

The screenshot shows a form titled "Trace Details". It includes the following fields:

- Trace Delivery Method: * Alert (dropdown menu)
- Defined Trace: [Text input field]
- Topic: * Call GM upon arrival (text input field)
- Trace Details: * Call Tiago upon arrival for a meet and greet (text area)
- Guest Name: [Text input field]

- Choose from the following options to decide when the trace will display

The screenshot shows the "Alert Options" section with the following checkboxes:

- During Check-In Process:
- During Check-out Process:
- Reserved Status:
- In-House Status:
- All Statuses:

- An example of how the trace will display:

The screenshot shows a window titled "Traces 92452680-1 Buckley, Caroline". It displays a table of pending alerts and a detailed view of a specific trace.

Guest Name	Topic	Trace Details	Due Date	Trace Status	User	Email Address	Department	Trace Delivery Method
	Call GM upon arrival	Call Tiago upon arrival for a meet and greet		Pending				Alert

The detailed view shows the following information:

- Trace Delivery Method: Alert
- Defined Trace: [Text input field]
- Topic: Call GM upon arrival
- Trace Details: Call Tiago upon arrival for a meet and greet
- Guest Name: [Text input field]
- Trace Status: Pending
- Completed:
- Cancelled:
- User: [Text input field]
- Email Address: [Text input field]
- Department: [Dropdown menu]
- Due Date: [Calendar icon]

The "Delivery Details" section shows:

- Trace Delivery Options: [Text input field]
- Alert Options: During Check-In Process:
- Rate Plan Code: [Text input field]

- Some reservations will have a trace that requires actioning. Once actioned, the trace can be marked as Completed

Trace Status:

Completed:

Cancelled:

User:

Email Address:

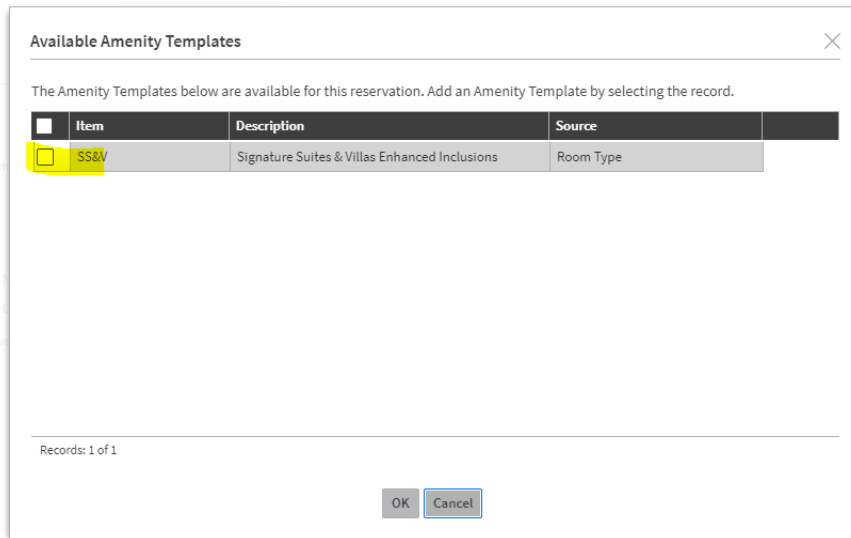
Department:

Due Date:

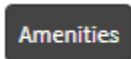
Amenity Templates

Room categories or rate codes that offer extra amenities can have Amenity Templates attached to them and will prompt you to add them to the reservation when booked.

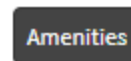
For example, Signature Suites and Villas will have an amenity template pop up. To add the extra amenities from the pop up, select the record and hit OK.



Once the amenities are added, the amenity icon will be blue:



If the icon is red, that means the amenities have not been added.



Clicking the icon will open up the amenities record and will display the amenities missing. To add them, you will select all items, hit submit, and then hit save

Incomplete Amenity Template

Incomplete Amenity Template:

Maximum Amenity Selection:

Active

<input checked="" type="checkbox"/>	Item	Description	Category	Sub-Category	Quantity
<input checked="" type="checkbox"/>	BAMEN	Personalized enhanced bathroom amenity			1
<input checked="" type="checkbox"/>	BAR	Complimentary fully stocked mini bar incl. coffee			1
<input checked="" type="checkbox"/>	BRKFST	Breakfast in restaurant or suite/villa			1
<input checked="" type="checkbox"/>	CHAT	Pre-arrival consultation			1

Records: 10 of 10

Show Filter Row:

To remove any amenities, change the status from Active to Inactive

Active

Item	Item Description	Template	Template Description	Category	Sub-Category	Start Date	End Date	Quantity	Frequency	Control	Source	Notes	Notification
BRKFST	Breakfast in restaurant or suite/villa	SS&V	Signature Suites & Villa Enhanced Inclusions.			05/11/2023	05/11/2023	1	Once	Per Room	Rate Plan		RES,RO
BRKFST	Breakfast in restaurant or suite/villa	SS&V	Signature Suites & Villa Enhanced Inclusions.			05/11/2023	05/11/2023	1	Once	Per Room	Room Type		RES,RO

Amenities Details

Item:

Template:

Category:

Sub-Category:

Start Date:

End Date:

Quantity:

Frequency:

Control:

Source:

Notes:

Status:

Notification Department:

Delivery Department:

Delivered:

Retrieval Department:

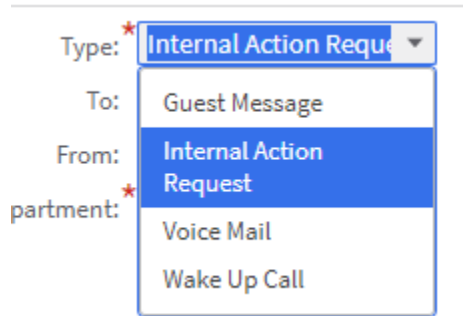
Available:

Overbook:

Internal Action Requests

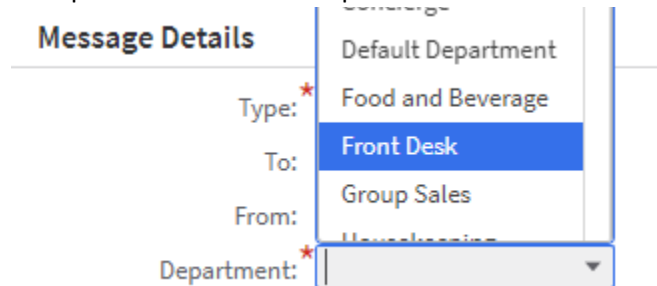
If you need to alert a specific department to do something for a reservation, you can create an **Internal Action Request** from the **Messages** tab. For instance, this is what you would use to notify the Front Desk of a request that needs to be seen prior to arrival (i.e. – allergies, assign near rooms, etc.). The department will see the request when they run the daily Internal Action Report

- Under Message Details, chose **Internal Action Request**



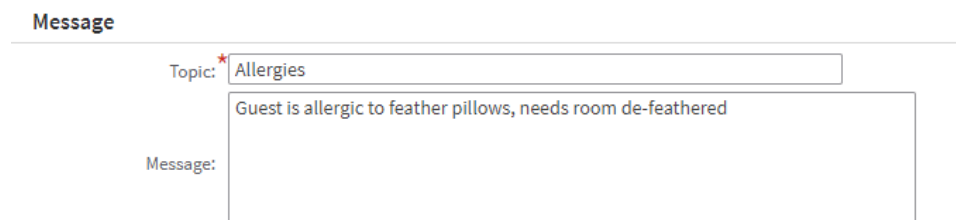
The screenshot shows the 'Message Details' form. The 'Type' field is a dropdown menu with 'Internal Action Request' selected. The 'To' field is 'Guest Message'. The 'From' field is 'Internal Action Request'. The 'Department' field is a dropdown menu with 'Voice Mail' and 'Wake Up Call' visible.

- Chose the department from the drop down list



The screenshot shows the 'Message Details' form. The 'Department' field is a dropdown menu with 'Front Desk' selected. The 'Type' field is 'Food and Beverage'. The 'To' field is 'Front Desk'. The 'From' field is 'Group Sales'. The 'Department' field is 'Front Desk'.

- Type the message in the message box



The screenshot shows the 'Message' form. The 'Topic' field is 'Allergies'. The 'Message' field contains the text: 'Guest is allergic to feather pillows, needs room de-feathered'.

- Choose the reminder date/time for when you want the email to be sent. Received date/time is the day the message was created



The screenshot shows the 'Reminder Date/Time' field set to '28-JUL-2023 09:00' and the 'Received Date/Time' field set to '27-JUL-2023 16:28'.

- It is best practice to set the Reminder Date to the day after the reservation was made, so the relevant team sees the request as soon as possible
- Hit save

Preferences

Preferences is where users will note guests room requests, arrival/departure notes, and other information. Preferences that are saved on a guest profile will automatically populate in the reservation once the guest profile is added to a reservation.

- They are grouped by categories which include Room Requests, Arrival/Departure information, etc.
- Save on the reservation only or to add the preference to a guest's profile click "Save to Profile"
- You will add a preference by going to the **Preferences** tab on the main menu

Preference Details

Preference: Q=

Descriptor:

Descriptor Details:

Save to Profile:

- Users must click the spyglass icon to search and add preferences. If you already know the three letter code, you can search it in the top right corner. If you do not, you can type in the description field to bring it up

Preferences

Select a record and click OK.

(default) Edit Preference (A) | Run

Preference	Description	Descriptor Type	Preference Type	Category
(A)	(A)	(A)	(A)	(A)
1CM	Coffee Maker Request	None	Global	Housekeeping
1DBL	Double Bed if available	None	Global	Bedtype
1GK	Guaranteed King	None	Global	Bedtype
1NR	Near Rooms	None	Global	Location
1RR	Refrigerator Request	None	Global	Housekeeping
1XT	No Turn Down Service	None	Global	Housekeeping
2BA	2 Bathrooms	None	Global	Room Features
2BL	2 Balconies	None	Global	Outside Space

Show Filter Row:

OK Cancel

- Users must click the "save" icon each time they add a new preference
- Descriptor: When a preference needs more details can be added to complete information
 - Some preferences have descriptors that say "non-validated selectable text." In this case, you can freely type in the descriptor box. The preference will not allow you to save unless you type in the box. Example: BDY

Preference Details

Preference: Q= Celebrating Birthday

Descriptor: Q=

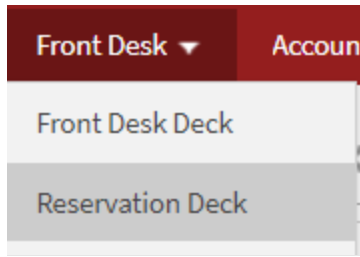
Descriptor Details:

Save to Profile:

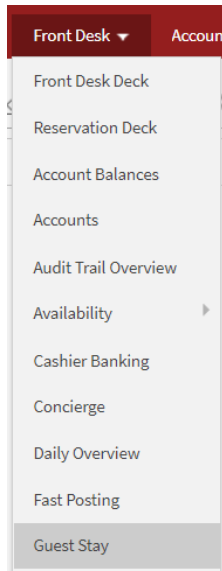
Search for a Reservation

From the **Start Center**, you can get to the search screen two ways

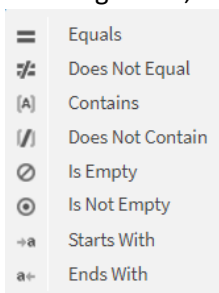
- Under **Front Desk**, click **Reservation Deck**



-
- Under **Front Desk**, click **Guest Stay**



-
- Once you are on the **Guest Stay** page, users can search by a number of fields. The system is automatically set up to search Current (Today+Future) Guests, but there is a drop down menu where you can change exactly what type of reservation you are searching for
- Most common search fields:
 - **First/Last Name**
 - **Confirmation Number** is the HMS confirmation number.
 - **Arrival/Departure Dates**
- Users can change the dataspy to return results based on what they have input. Each dataspy has the following menu, which makes it easier to search with whatever information you have



- Once the user has input the data they have in the correct field, click “Run” to return results
 - If there are multiple guests attached to the same reservation, the reservation will show up as many times as there are guests attached
- Scroll to the right to view more details
 - If you highlight the reservation, you will find the confirmation number located in the top left of the search screen.
- Double-click the reservation to open the reservation

Modify a Reservation

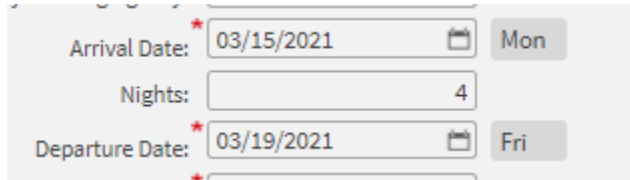
Changing fields that affect the rate

The following fields are associated with rates, so changing any of these fields may update the rate on the reservation higher or lower, depending on the current rate for those dates.

- Arrival or departure dates
- Room type
- Rate code
- Occupancy

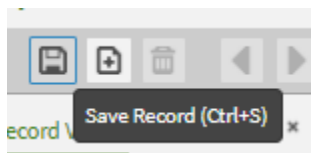
Removing Nights

- Adjust the reservation dates on the main page of the Guest Stay Screen



A screenshot of a reservation form. It includes three input fields: 'Arrival Date:' with the value '03/15/2021' and a calendar icon, 'Nights:' with the value '4', and 'Departure Date:' with the value '03/19/2021' and a calendar icon. To the right of the arrival date is a button labeled 'Mon', and to the right of the departure date is a button labeled 'Fri'. There are small red asterisks above the arrival and departure date fields.

-
- Click Save on the reservation



Adding nights

- Adjust the reservation dates on the main page of the Guest Stay Screen
- Open the Rate Plan field in order to display the Rate Shop Screen and click Search
- You will see the current selling rates for the stay (The rates of the reservation may not match)
- The dates that have previously been confirmed will have a green line above

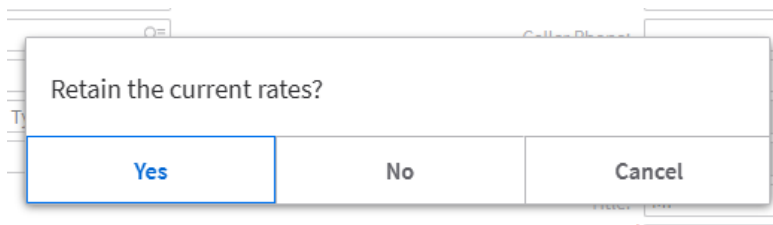
The screenshot shows the 'Rate Shop' interface with the following details:

- Dates:** Thu, 31-JUL-2025 - Mon, 04-AUG-2025
- Nights:** 4
- Guests:** 2 Adults
- Sales Strategy:** Public Rates
- Room Type Categories:** (Empty)
- Room Types:** SUPR
- Rate Plans:** UGRBAR
- Room Type for Charge:** SUPR
- Group:** (Empty)
- Organization:** (Empty)
- Primary Booking Agency:** (Empty)
- Promotion:** (Empty)
- Reservation Template:** (Empty)
- Currency:** Euro
- Convert from Property Currency
- Show Restricted Sell Options
- Search** button

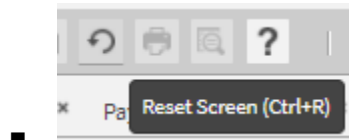
Room Rates Table:

Rate Plan	31-JUL-2025 Thursday	01-AUG-2025 Friday	02-AUG-2025 Saturday	03-AUG-2025 Sunday
Current Rates	€1.550,00	€1.450,00	€1.450,00	--
LRS: La Residencia	24	32	25	27
SUPR	4	5	5	5
UGRBAR	€1.850,00	€1.850,00	€1.850,00	€1.850,00

-
- Quote the additional nights
- If accepted:
 - Exit out of the Rate Shop Screen & click save on the Record View
 - If the rates have changed, the System will ask if you want to Retain Current Rates. Choosing **Yes** will keep the original rates for the original dates, choosing **No** will reset all of the rates to the current rates.

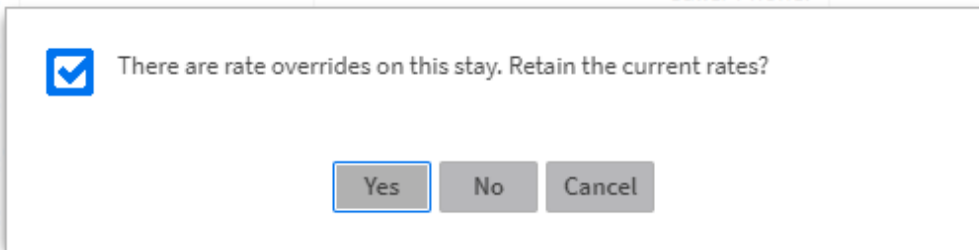


-
- Note: Selecting Yes to Retain Current Rates may carry over the original rates to the additional nights. You may need to manually adjust the additional nights to the rates quoted. See [Overriding/Discounting Rates](#)
- Send Modified Confirmation letter
- If not accepted:
 - Click Cancel on the Rate Shopping screen
 - Click the **Reset Screen** button to revert the reservation back to the original dates



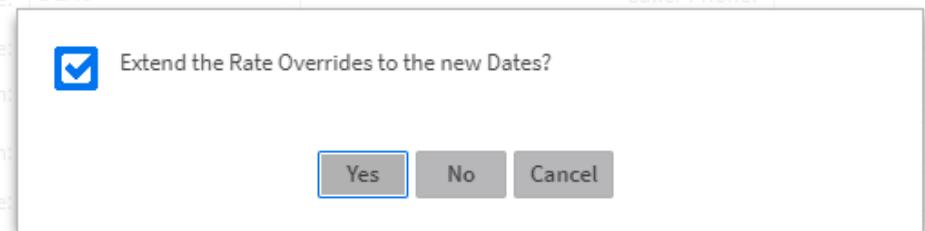
Retaining Rates

- If you are changing dates of a reservation and there are rate overrides, the system will give the following message before modifying the reservation



A dialog box with a white background and a thin border. At the top left, there is a blue checkmark icon in a square box. To its right, the text reads "There are rate overrides on this stay. Retain the current rates?". At the bottom of the dialog, there are three buttons: "Yes" (highlighted with a blue border), "No", and "Cancel".

- Choosing **Yes** will keep the overrides on the previously reserved rates in place, choosing **No** will reset all of the rates to the current rates.
- If you choose **Yes**, the system will give you the following message



A dialog box with a white background and a thin border. At the top left, there is a blue checkmark icon in a square box. To its right, the text reads "Extend the Rate Overrides to the new Dates?". At the bottom of the dialog, there are three buttons: "Yes" (highlighted with a blue border), "No", and "Cancel".

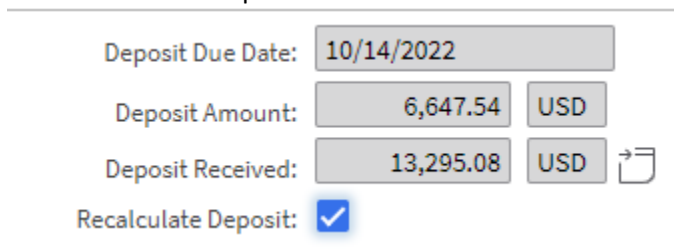
- Choosing **Yes** will apply the overrides to the additional dates you are adding to the reservation, choosing **No** will not apply the overrides and the current rates will apply only to the new dates

Changing the reservation stay completely

- Adjust the reservation dates on the main page of the Guest Stay Screen
- Click the Rate Code field to open Rate Shopping Screen
- Follow the instructions for [Check Availability](#) in order to quote new rates and availability

Recalculate Deposit

- If a reservation has been modified and the deposit amount has changed, the "Recalculate Deposit" button will need to be checked so the correct deposit amount is displayed
- If a reservation has been modified and the tax amount has not changed, is not showing or is incorrect, the "Recalculate Deposit" button will need to be checked so the correct tax can be recalculated as well



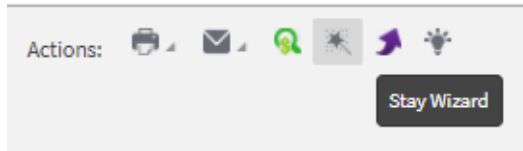
A form with a white background and a thin border. It contains four rows of input fields. The first row is "Deposit Due Date:" followed by a text box containing "10/14/2022". The second row is "Deposit Amount:" followed by a text box containing "6,647.54" and a dropdown menu showing "USD". The third row is "Deposit Received:" followed by a text box containing "13,295.08", a dropdown menu showing "USD", and a small icon of a document with an arrow. The fourth row is "Recalculate Deposit:" followed by a blue checkmark icon in a square box.

Overriding/Discounting Rates

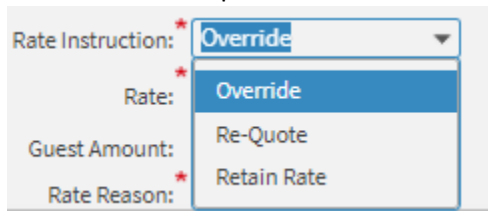
There are times where a user may need to discount a rate. For instance, a manager could approve a 10% discount. You will need to confirm the reservation under the correct rate code and change the rate after

confirming reservation. **Reminder:** If a reservation requires multiple rate codes, it will need to be split into separate reservations. You cannot confirm a singular reservation with multiple rate codes

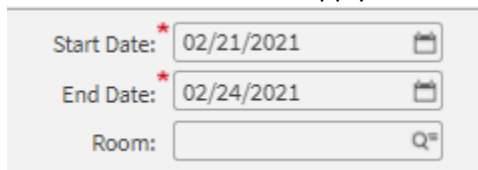
- Once confirmed, find the **Stay Wizard** icon in the top right corner



-
- Chose **Override** in the drop down menu for Rate Instruction



-
- Once chosen, you can type in the rate quoted in the **Rate** field. You will also need to note a **Rate Reason**
- Users can choose which dates to apply the changes to in the **Start** and **End Date** fields

A screenshot of a form showing three fields: 'Start Date:' with the value '02/21/2021', 'End Date:' with the value '02/24/2021', and 'Room:' with a search icon. Each date field has a calendar icon to its right.

-
- Make sure to put a note in the reservation to say why you are discounting the rate.

Updating a Credit Card on a Reservation

If a guest would like to change the credit card on their reservation, they can do this over the phone or by email. If they would like to do it over the phone, you can click the **New** button under the credit card in the **Guarantee** section of the booking

Guarantee

Guarantee Type: *

Card Number: **New**

Card Type:

Expiration Date:

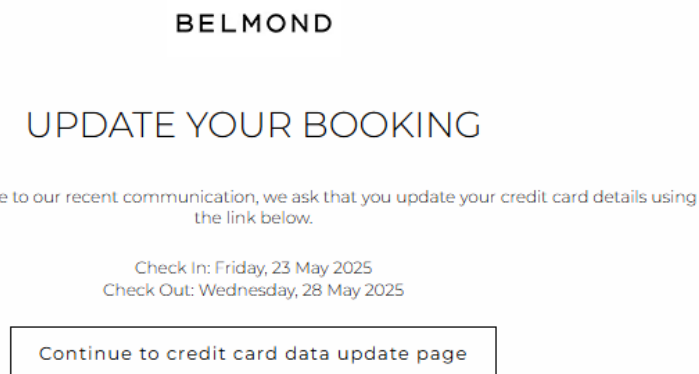
Name on Card:

If they would like to do it over email, you can send them an Update CC email directly from the Vision Conf Letter Tab in HMS.

Letter type

- Update CC
- Confirmation
- Cancellation
- Update CC**

They will receive an email like the below:

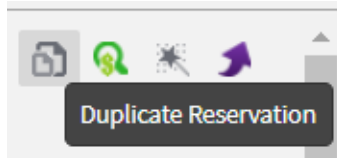


Note: The reservation cannot have the Guarantee Status of Hold/Option in order to send the Update CC letter. It must be under a different status, such as Credit Card, Deposit Pending, or Deposit.

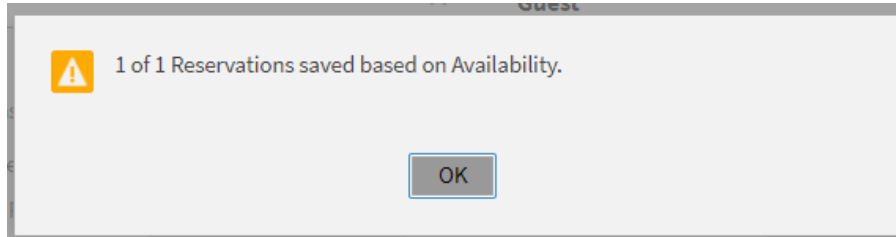
Duplicating vs Copying a Reservation

While this function allows a reservation to be duplicated, it does not include checking availability and rates for the new reservation. Agents must follow steps to [Check Availability](#) before using this function.

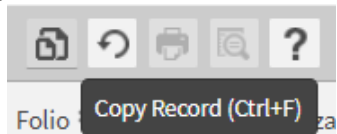
- To **Duplicate** a reservation, find the icon in the top right corner



-
- It will ask if you would like to copy the guarantee method. By selecting “yes,” the credit card use to confirm the original reservation will be used to confirm the duplicate reservation, without having to have the guest repeat it
- Once duplicated, the following pop up will appear. After closing the pop up, you will still be on the Record View of the original reservation



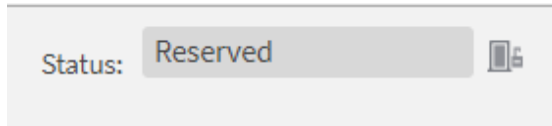
- - **Note:** The duplicate function will not work if there is no availability in the room category of the original reservation. A pop-up will appear that says “0 of 1 Reservations saved based on Availability.”
- To **Copy** a reservation, find the icon in the top left corner



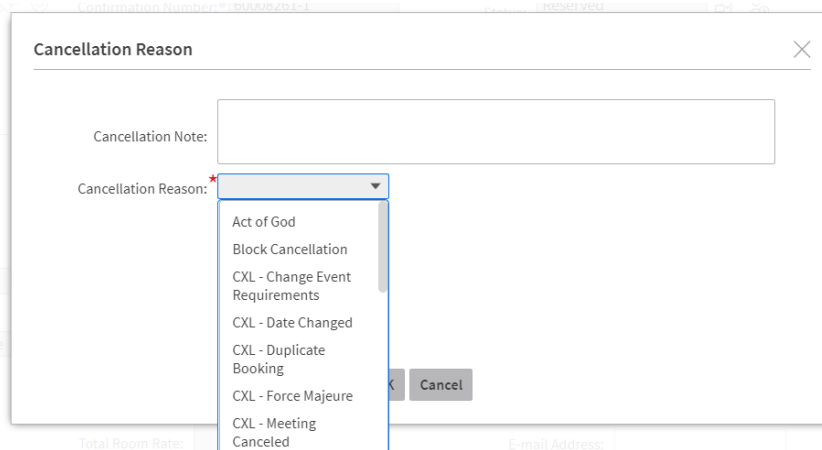
-
- Once the icon is clicked, it will copy the reservation without the credit card details. All other details of the reservation will be the same. Once you get the credit card to guarantee, you will need to save the reservation and you will get a confirmation number

Cancel a Reservation

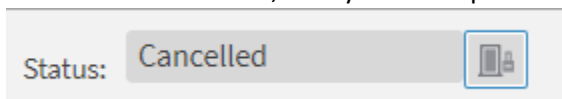
- The status of the reservation will be displayed at the top of the screen
- Hover over the door icon next to the "Status" field



-
- Choose a cancellation reason from the menu that appears and make any appropriate notes in the **Cancellation Note** section
 - **Act of God:** This term typically refers to events that are caused by natural forces, without any human intervention. Examples include hurricanes, earthquakes, floods, volcanic eruptions, or other severe weather events.
 - **Trip Cancelled:** Guests no longer travelling
 - **Duplicate Booking**
 - **User Error / Training / Test**
 - **Expired Option Date:** Space being held has been released
 - **Force Majeure:** This is a broader term that includes both acts of God and other events beyond a party's control, such as war, terrorism, labor strikes, government regulations, or pandemics.
 - **Lost to Another Source:** Re-booked via travel agent, tour operator, OTA, etc
 - **Room Move Scheduled**
 - **Other Reasons**
 - **Price Resistance**
 - **Resort Closed for Season**
 - **Restriction LOS:** Cancelling due to length of stay requirement
 - **Illness**
 - **Waitlist Denial:** Use to cancel waitlist reservations



- Once reason is chosen, the system will process the request and the status will show Cancelled



- The cancellation number is found at the bottom screen titled "Reservation"

Reservation

Check-Out with Balance Reason:

Cancellation Date: 07/08/2021 08:49

Cancellation Number: 2129255

Cancellation Reason: Act of God

External Cancellation Number:

Cancellation Note:

Having issues with the covid process and do not wish to travel until covid is over okay to refund per Tiago - rp 07jul2021

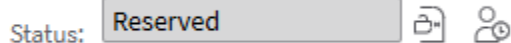
-
- ***Note:** Once a reservation is canceled it should NOT be “reinstated”. While HMS has this function of reinstating, this should not be used because our CRS system SynXis will not recognize the reinstated reservation. If a cancelled reservation needs to be remade, it should be done via the copy function

Reinstate a Reservation

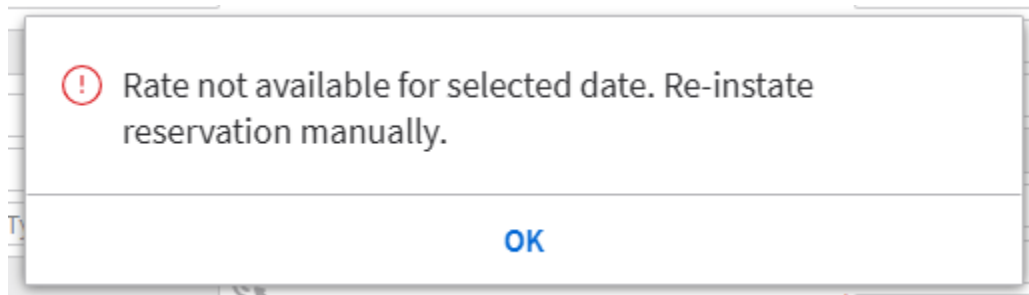
If a reservation has been cancelled in error, the reservation can be reinstated by clicking the “reserve” button next to the status



If the same category and rate plan are available, the reservation status will change to Reserved and the reservation will be active again. The confirmation number will stay the same. Originally confirmed rates can be honored up to 24 hours after the reservation was cancelled. After 24 hours, rates need to be re-checked.



If the category or rate plan is not available, you will not be able to reinstate the reservation. You will receive this message:

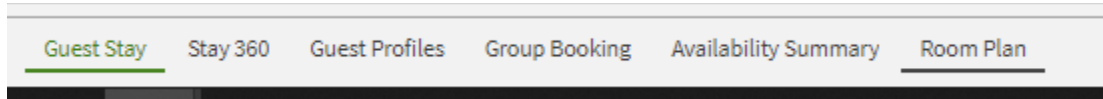


You should move forward with rechecking availability and reinstating the reservation with the updated availability.

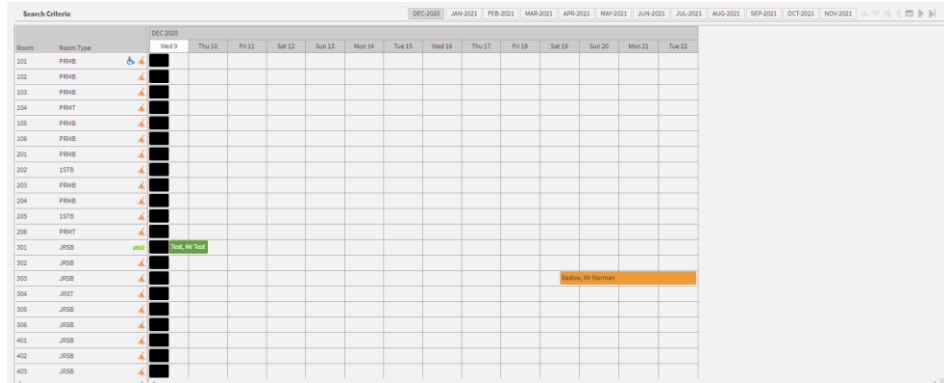
Room Assignments & Upgrades

Checking for Specific Rooms Prior to Quoting

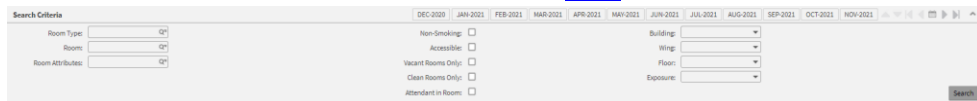
- There are instances where users will need to check that certain rooms are available before quoting, if selling a Villa or Cottage that needs to be built.
- Start at the **Reservation Deck**
- Select **Room Plan** at the bottom of the screen



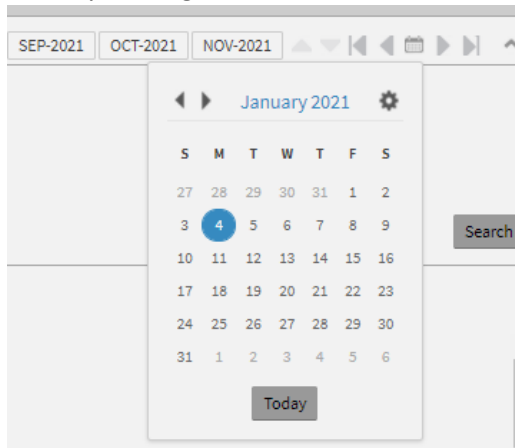
- This screen will show you the rooms in numerical order, their current status, and if they are preblocked



- Under **Search Criteria**, you can select the specific room types, numbers, or attributes that you are looking for. You can find the full list of room attributes [here](#)



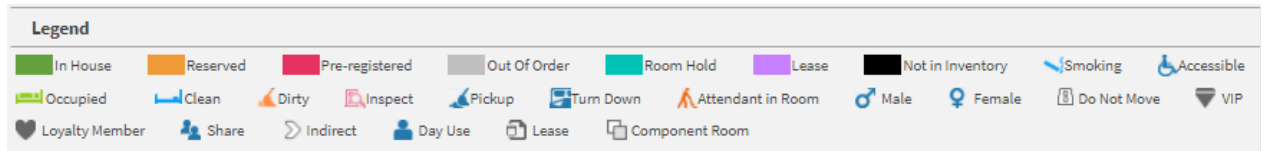
- You can search month by month and it automatically shows you what is available starting with the first of the month. Or you can choose which date you would like to see availability starting from by clicking the calendar icon



- Use the arrows in the top right corner to shift the room plan display by date



- At the bottom of the room plan, there is a **Legend** that explains the different colors and icons



Room Blocking

- From the Record View, find the **Room** field and click the spyglass
- If **Preferences** are saved on the booking, the system will only return available rooms that have the features requested. If you want to search all available rooms or by additional features, adjust the **Room Attributes** field using the drop down menu
 - You can narrow down which rooms you want with the following fields, in addition to Room Attributes

- Search for **Connecting Rooms** by typing CON in the Room Attributes field.
- To choose a room, click the blue door next to the room number
- Click save
- The room is now listed in the **Room** field
- To make room **Do Not Move**, check Do Not Move
- You must provide a reason why the room is assigned DNM. Choose a reason from the “Do Not Move Reason” dropdown

Upgrading Room Category

- There are times where an agent may upgrade a room- see specific hotel rules. To do this correctly, follow the steps below
 - Select the **Room Type**. This is the actual room category that the guest is staying in
 - Select the **Room Type for Charge**. This is the room category that the guest will be paying for

- It is mandatory to select a reason for the RTC. Choose from the drop down menu

RTC Reason: *

- Central Reservations
- GM's Approval
- Guest Complaint
- Head Office Approval
- Manager Approved
- Negotiated Rate
- Occupancy Changes During Stay
- Rate Match
- Rate Not Built

- When you save, the system will ask if you want to retain current rates. Select “yes”
- If the guest should be charged for the upgrade, then apply the Add On: “UPSELL” or “UPGRADE”. Change the Unit Price based on additional cost of the upgrade. The nightly rate in the reservation will stay the same but the guest will be charged an extra amount each night and this Add-on will appear on the confirmation letter.



Pricing Details

Item Type: * Non-Room Item

Item: * UPSELL Upsell

Quantity: * 1

Start Date: * 10/19/2022

End Date: * 10/21/2022

Folio: * Guest

Unit price: * 100.00 EUR

Avg. Daily: 100.00 EUR

Total Cost: 300.00 EUR

Package Item:

Comment Prompt:

Comment:

Bundle Details

Record Details

Direct Bill

- When confirming a reservation, select **Direct Bill** under the **Guarantee Type**

The screenshot shows a 'Guarantee' form with a dropdown menu for 'Guarantee Type' open. The dropdown list includes: Allotment, Credit Card, Delegate CC, Deposit, Deposit Pending, Direct Bill (highlighted), Group Guarantee, Hold/Option, Manager Guarantee, Quote/Inquiry, and Waitlist. Other fields in the form include Card Number, Card Type, Expiration Date, Name on Card, and Save to Profile.

-
- One selected, the A/R Account Section will be mandatory. Select the account it should be routed to from the list

The screenshot shows an 'A/R Account' selection dialog box. It contains a table of accounts with columns for A/R Account, A/R Account Number, Contact First Name, Contact Last Name, Contact Phone, and Address. The first row is selected.

A/R Account	A/R Account Number	Contact First Name	Contact Last Name	Contact Phone	Address
80 Days Travel	96444281	Christoffer	Dinsen		
Abercombe & Kent	52313216	Amanda	Singer		
Airtours Deutschland	50628966	Hillegonda	Hillmann	049 511 567 2973	Adrese der Gesellscha Karl-Wiechert-Allee
Alldays	47709136	Quaranta	Angela		
Alpitour World/Viaggidea/Eden	11453411	Milanese	Monica		
America World	47734777	Valeria	De Bonis	390112293280	Lungo Dora Colletta

-

Auto Transfer

- Users can set up routing to a different credit card or a different reservation altogether
- Click the **Auto Transfer** Tab
- **To Account** defaults to the guest's account. You can bill someone's entire stay by choosing a different Account to route to.
- To set up routing on the same account, you will need to choose a different folio under **To Account Folio**

Auto Transfer Details

To Account: * Buckley, Caroline Q* 22079208-1

To Account Folio: * Folio 2

Start Date: * Guest

End Date: * Folio 2

Code Type: * A/R

Code: 3rd Party

Description: Folio 7

Include Tax: Folio 8

Split Details

Split Amount: \$ Exchange

- Choose **Code Type**

Code Type: *

Code: All Transactions

Description: Transaction Code

Include Tax: Transaction Group

Transaction Type

- Choose the correct code(s) in the popout menu.

Code Transaction Code Groupings

Select a record and click OK.

(default) Edit Code [A] Run

Code	Description
[A]	[A]
BELLIN	Bellini Credit
BEVCRD	Beverage Credit
BTQUE	Boutique Credit
FNB	Food And Beverage Credit
JETLX	Jetlinx
LAUN	Laundry
RESORT	Resort Credit
SPACR	Spa Credit

Show Filter Row: [checked] [dropdown] [refresh] [help]

OK Cancel

- Hit save
- Click on **Folio**

Folio

- Click on **Folio Settlement**



Folio Settlement

Folio Wizard

- Choose the folio you choose for **To Account Folio**. You will see that transfer rules have been established

Folio Settlement

All Edit

Folio	Folio Balance	Currency	Settlement Type	Card Type	Card Number	A/R Account	Transfer Rules Established	Description
A/R	0.00	USD					<input type="checkbox"/>	
\$ Exchange	0.00	USD					<input type="checkbox"/>	
3rd Party	0.00	USD					<input checked="" type="checkbox"/>	
Corrections	0.00	USD					<input type="checkbox"/>	

Records: 9 of 9 123

- Under **Settlement Type**, choose the correct card type. Use the option without the asterisk
- Type in the card number

Folio Settlement Details

Settlement Type: 🔍 📄

Card Type: 📄

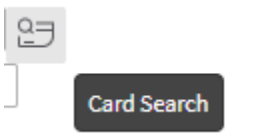
Card Number:

Expiration Date:

Name on Card:

Save to Profile:

- If setting up routing to the card on file, click the card search button and select the card



- Once the card has been added/selected, write a description of the charges, ie "room and tax to VA ending in 5422"

Description:

Folio: 3rd Party

A/R Account:

Paperwor

A/R Status:

Billing

- Click **Save**



- Click **Close**

Close

Bank Transfers

Guests may request to pay for their reservation by bank transfer.

- Use the guarantee type of “Bank Transfer Pending”

Guarantee Type: ▼

Card Number:

Card Type:

Expiration Date:

Name on Card:

Save to Profile:

-
- Take a credit card to guarantee the reservation. Let the guest know that if the transfer is not received, the team that manages deposits will contact them and may charge their card.
- Make a trace in the booking noting the guest will be paying via wire transfer and to contact them directly if the transfer is not received. See [Traces](#)

Confirmation/Cancellation Letters

- To send a confirmation letter, scroll to the **Vision Conf Letter** tab

Vision Conf Letter X

-
- Under the “Letter type” drop down menu, select which letter you want to send.
- There is a dropdown menu to choose the recipient email address: primary guest, caller, or HMS user

-
- If there is need to send the letter to someone other than the primary guest or caller, you can select yourself for the "recipient" and still manually enter any other email addresses in the CC field.
- Once loaded, you can add other email addresses you would like to send the confirmation letter to, as well as additional attachments

- To manually edit a confirmation letter, click the “edit content” button at the top of confirmation letter
 - Once in design mode, you can edit the confirmation however you would like
 - To stop editing, click the “edit content” button again
- If you want to see what has sent, you can go to the **History** tab
 - It will show where the email was sent, when it was sent, and if it was a confirmation or cancellation. You can click the listing and open the exact email that was sent

First name	Last name	Email	Subject	Status	Author	Send date
[Redacted]	[Redacted]	[Redacted]	Cap Juluca Reservation Confirmation: [Redacted]	success	bapi	4/29/2023, 9:55:06 AM
[Redacted]	[Redacted]	[Redacted]	Cap Juluca Reservation Confirmation: [Redacted]	success	bapi	4/29/2023, 9:50:35 AM
[Redacted]	[Redacted]	[Redacted]	Belmond Cap Juluca Reservation Confirmation: [Redacted]	success	bapi	2/28/2023, 10:43:42 AM
[Redacted]	[Redacted]	[Redacted]	Belmond Cap Juluca Reservation Confirmation: [Redacted]	success	bapi	2/22/2023, 10:00:55 AM

○

Pay by Link

If a guest would like to confirm their reservation via email, we can send a secure link directly from HMS.

- Enter Booking in HMS (See: [Mandatory Reservation Fields](#))
- Select Guarantee Type: Hold/Option

Guarantee

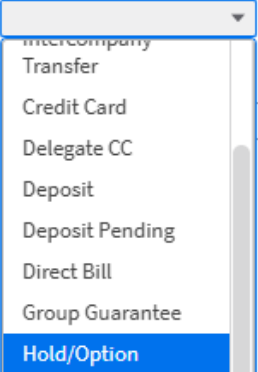
Guarantee Type:

Card Number:

Card Type:

Expiration Date:

Name on Card:



- On the Vision Confirmation Tab, select “Guarantee” letter

Vision Conf Letter X

Language

English

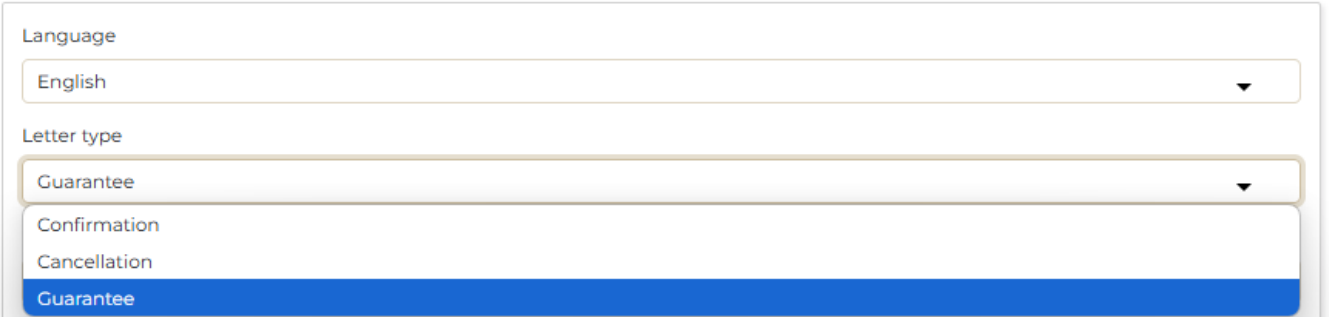
Letter type

Guarantee

Confirmation

Cancellation

Guarantee



- Set Payment Link Expiration
 - o 24 hours (default): Use for most bookings
 - o 12 hours: Use for bookings within 1- 3 days of arrival
 - o 48 or 72 hours: Use for exceptions with approval only

Payment link expiration

24hr



- Send letter to primary guest email and/or the caller email with link

Recipient(s) To

[REDACTED]@gmail.com (Primary Guest email) x | X ▼

Caroline.Buckley@belmond.com (HMS user email)

[REDACTED]@gmail.com (Caller email)

- The guest and/or caller will get the following email:

BELMOND

CONFIRM YOUR BOOKING

Dear Guest, in reference to our recent communication, we ask that you provide us with your credit card details using the link below in order to guarantee your reservation or requested service.

Please note this link will expire after 24 hours, we will no longer be holding the room(s)/services and the rate is subject to change.

Kindly request a new form if you need additional time or if this link has already expired.

Check In: Monday, 2 Feb 2026
Check Out: Thursday, 5 Feb 2026

[Continue to credit card data request page](#)

- If the card is submitted within the time frame, the card will interface into HMS, the guarantee type will change to "Credit Card" or "Deposit Pending," and the primary guest or caller will receive a confirmation letter
- If the card is not submitted, the reservation will automatically cancel, and the primary guest or caller will receive the following email:
 - Note: If you send the initial Guarantee email to both the primary and caller email, they will both receive the confirmation email or release of space email

BELMOND

PLEASE CONTACT US

Dear Guest, please note that the credit card link we sent you previously has now expired and we have released any space or services that we were holding.

You can request availability and pricing by contacting us [here](#).

Check In: Tuesday, 11 Nov 2025
Check Out: Wednesday, 12 Nov 2025

Waitlists

If you [Check Availability](#) and the hotel is sold out, or there is a minimum stay requirement that a guest cannot fulfill, you can create a waitlist reservation so the guest can be contacted if anything opens up.

- If nothing returns when you check availability and the guest wants to be added to the waitlist, follow the steps to view [Viewing Rooms and Rates that are Not Available](#).
- Check Rate Override

Rate Override:

Source Of Business: * Voice (Telephone) Pr Q=

Secondary Source Of Business: * PMS Q=

- Gather the guest contact information as though you are confirming a reservation. **You do not need to change the rates to zero.**
- Under Guarantee, choose Waitlist

Guarantee

Guarantee Type: * Waitlist ▼

- At the top of the screen, change the status to Waitlist. This will confirm the waitlist reservation.

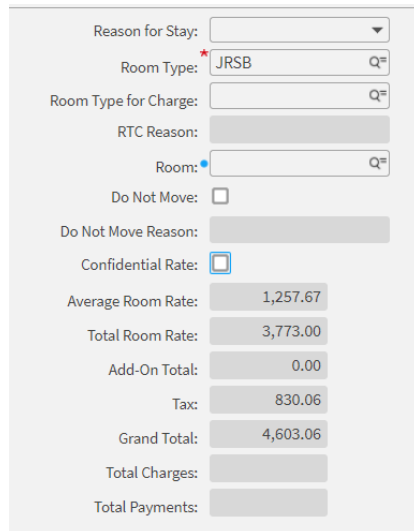
Status: New 

Waitlist

Additional Reservations Features

Confidential Rates

- There are times when you don't want the guest to know the rate on the reservation. For example, when someone else is paying for a guests' stay and they don't want the guest to see any rates or charges.
- Under the **Stay** section of the reservation, you can check the **Confidential Rate** box



Reason for Stay:

Room Type: Q[®]

Room Type for Charge: Q[®]

RTC Reason:

Room: Q[®]

Do Not Move:

Do Not Move Reason:

Confidential Rate:

Average Room Rate: 1,257.67

Total Room Rate: 3,773.00

Add-On Total: 0.00

Tax: 830.06

Grand Total: 4,603.06

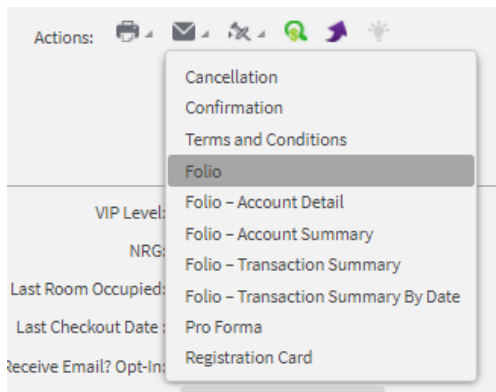
Total Charges:

Total Payments:

- Once the box has been ticked, the rate will not show on the confirmation letter or any other guest facing documents (i.e. registration card, guest folios, etc). Seeing it ticked should also alert the agent to not disclose the rate to the guest.
- Certain rate codes can be set up to automatically have confidential rates, such as third party bookings.

Folios

- To send a folio to a guest after their stay, find the email icon on the Record View page, in the top right corner



- When you choose the folio option, a popup screen will appear. You can choose which folio to send and additional email addresses to send to. Be sure to untick **Include Credit Card Details**

- Hit "Submit" and it will send out the folio

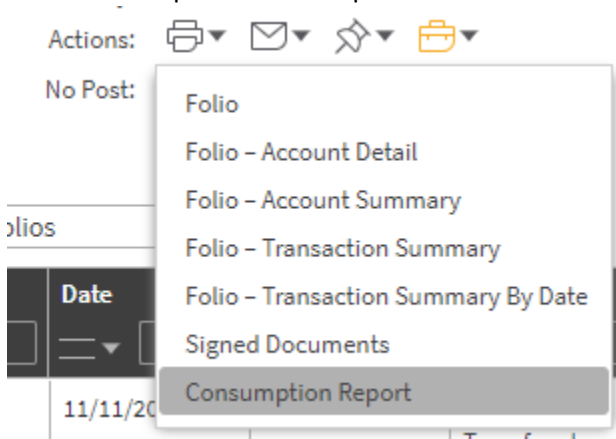
Consumption Reports

You can generate a consumption report to see the amount consumed for credits applied to a reservation, like Consortia or Package credits. It will show each credit's allowance, consumed, remaining, and overage amount by date.

- To generate, go to the Folio tab of a reservation:

Folio X

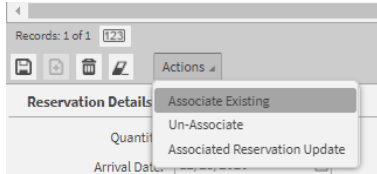
- Select the drop down on the printer icon and chose "Consumption Report"



Associated Reservations

If you want to link reservations to each other, you can associate them. Reservations are most commonly associated when one party has booked multiple rooms. The reservations do not need to have overlapping dates.

- Go to **Associated Reservations** on the top menu bar
- Find the **Actions** box and choose **Associate Existing** option



- Find the reservation you would like to associate, select it, and click submit. The reservations are now associated

Record View | Guest Details | Folio | Payment Authorization | Auto Transfer | Share | **Associated Reservations** | Preferences | Tax Invoicing | Notes | Message

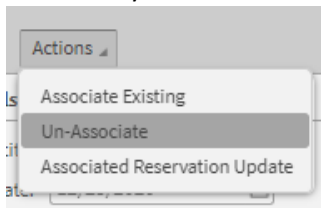
Process Details

Associated Reservation Name: [Redacted] Status: [Redacted]
Confirmation Number: [Redacted]

Active Reservations [Edit]

Select	Last Name	First Name	Title	Coordinator	Confirmation Number	Arrival Date	Departure Date	Adults	Children	Status	Rate Plan	Total
<input type="checkbox"/>	[Redacted]	[Redacted]	Mr	<input checked="" type="checkbox"/>	28041121-1	11-SEP-2025	19-SEP-2025	2	0	Reserved	UGRBAR	
<input type="checkbox"/>	[Redacted]	[Redacted]	Mr	<input type="checkbox"/>	90633611-1	11-SEP-2025	14-SEP-2025	2	1	Reserved	UGRBAR	

- You can Un-Associate reservations by choosing the option from the drop down menu and choosing which reservation you want to unassociate




- To open an associated reservation from the Associated reservation tab, select the reservation you would like to open, and click the red pencil next to the confirmation number

Guest Stay 81769426-1 [Redacted] 18

Record View | Guest Details | Folio | Payment Authorization | Auto Transfer | Share | **Associated Reservations** | Preferences | Tax

Process Details

Associated Reservation Name: [Redacted] Mrs Emily Status: Reserved
Confirmation Number: 53076532-1 

Active Reservations [Edit]

Select	Last Name	First Name	Title	Coordinator	Confirmation Number	Arrival Date	Departure Date	Adults	Children
<input type="checkbox"/>	[Redacted]	Debbie	Mrs	<input type="checkbox"/>	81769426-1	26-AUG-2025	30-AUG-2025	2	0
<input type="checkbox"/>	[Redacted]	Emily	Mrs	<input checked="" type="checkbox"/>	53076532-1	26-AUG-2025	30-AUG-2025	2	2
<input type="checkbox"/>	[Redacted]	Zach	Mr	<input type="checkbox"/>	14863222-1	26-AUG-2025	30-AUG-2025	2	1
<input type="checkbox"/>	[Redacted]	Jake	Mr	<input type="checkbox"/>	58758525-1	26-AUG-2025	30-AUG-2025	1	0

Note: Do not hit save after associating reservations. Hitting save will automatically create a duplicate reservation

Record View × Guest Details × Folio × Payment Authorization × Auto Transfer × Share × **Associated Reservations** × Preferences × Tax Invoicing × Notes × Mess

Process Details

Associated Reservation Name: Status:
Confirmation Number:

Active Reservations

Select	Last Name	First Name	Title	Coordinator	Confirmation Number	Arrival Date	Departure Date	Adults	Children	Status	Rate Plan	To
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	Mr	<input type="text"/>	70570134-1	03-OCT-2025	08-OCT-2025	2	0	Reserved	UGRBAR	

Records: 1 of 1

Reservation Details

Quantity: Room:
Arrival Date: Total Rate:
Nights: Average Rate:
Departure Date:
Adults:
Children:
Rate Plan:
Room Package:
Meal Plan:
Room Type:
Rate Override:

Incognito Profiles

Users can make a profile incognito for high profile guests. An alias name will appear on the reservation and certain reports. Only authorized users will have access to the real name of the guest. The Alias will be searchable in the data spies

- The Incognito function is located to the right of the Guest Profile on the Record View of the reservation. Once the Incognito box is checked, the NRG is automatically checked and Alias name fields become mandatory

Incognito:

NRG:

Alias Last Name:

Alias First Name:

Attaching Documents

Users can add documents to reservations, such as a credit card authorization form.

- Go to **Documents** on the top menu bar
- Click Create/Upload Document

Create/Upload Document

- Click the file icon next to File Name and select the document you would like to attach.

Create/Upload Document




Select Document Method, then populate the appropriate fields.

Document Code:

Property: * CAP Q=

Upload Document:

Create File System Document:

File Name: * 

File Type:

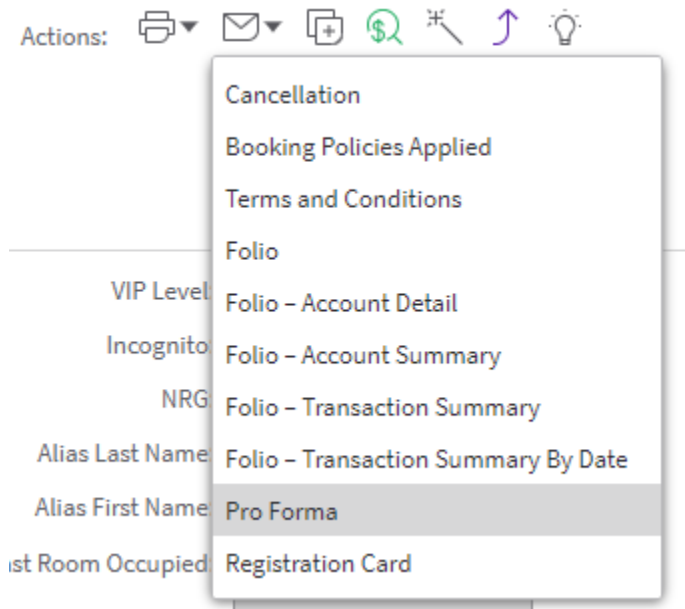
File Path:

- Hit "Submit"

Proforma Invoices

A proforma invoice is a preliminary bill that can be sent when a guest or agent is pre-paying for a stay.

- To send a Proforma Invoice, select **envelope** icon in the top right corner of the Record View



- When you choose the Pro Forma option, a popup screen will appear. Tick the email box to email the invoice directly from the system. If there is an email on the guest profile, it will populate in the email address field. You can add another email address in the Additional Email Addresses field
- Click **Submit** to send

Rate Information

When opening a confirmed reservation, you can easily see the rate inclusions and deposit/cancellation policies by clicking on the Rate Information icon next to the rate plan.

- On the Record View of a reservation, click the “i” icon next to Rate Plan

A screenshot of a form showing reservation details. The 'Rate Plan' field contains 'CONBC9' and has a search icon and an information icon (a lowercase 'i' in a circle) to its right, which is highlighted with a red square. Below it are fields for 'Group Routing', 'Room Packages' (containing 'Minibar Non-alcohol Be' and a green bar icon), 'Meal Plan' (containing 'Daily Breakfast Bellini'), and 'Rate Override' with an unchecked checkbox.

- This will open the Rate Information screen, displaying the rate description, average daily rate and total, and deposit/cancellation policies

Rate Information



Splendido Mare | D - Junior Suite Sea View/Balcony

CONBC9: Bellini Club

Bellini Club

Welcome note, Upgrade subject to availability upon arrival, EUR 90 resort credit per stay for room bookings, EUR 200 resort credit per stay for suite bookings

Package Inclusions	Average Daily Rate	803,33 EUR
<ul style="list-style-type: none">• Minibar Non-alcohol Beverage<ul style="list-style-type: none">- Minibar BAR Beverage Non-Alcohol- Minibar BAR Beverage Non-Alcohol Allowance• Daily Breakfast Bellini<ul style="list-style-type: none">- Daily Breakfast Adult Bellini• Bellini credit<ul style="list-style-type: none">- Hotel/Resort Credit 100 USD per room per stay	Average Rate With Resort Fee	803,33 EUR
	Total Resort Fees	0,00 EUR
	Total Taxes	271,00 EUR
	Total Price For Stay	2.681,00 EUR
	Commissionable	10 %

Policies

Guarantee

CC/SE/30

A valid credit card is requested at booking. As the cancellation deadline approaches, the card will be preauthorized for the reserved amount. Bookings exceeding EUR 25.000 require a 50 percent non-refundable deposit 30 days prior to scheduled arrival date.

Cancellation

12PM/3D/FULLSTAY/TAX/SE/30D

Cancel 12pm 3 days prior to arrival or pay full stay plus tax. Bookings over EUR 25.000 cancel 30 days or pay full stay

Advance Deposit Cancellation

12PM/3D/FULLSTAY/TAX/SE/30D

Cancel 12pm 3 days prior to arrival or pay full stay plus tax. Bookings over EUR 25.000 cancel 30 days or pay full stay