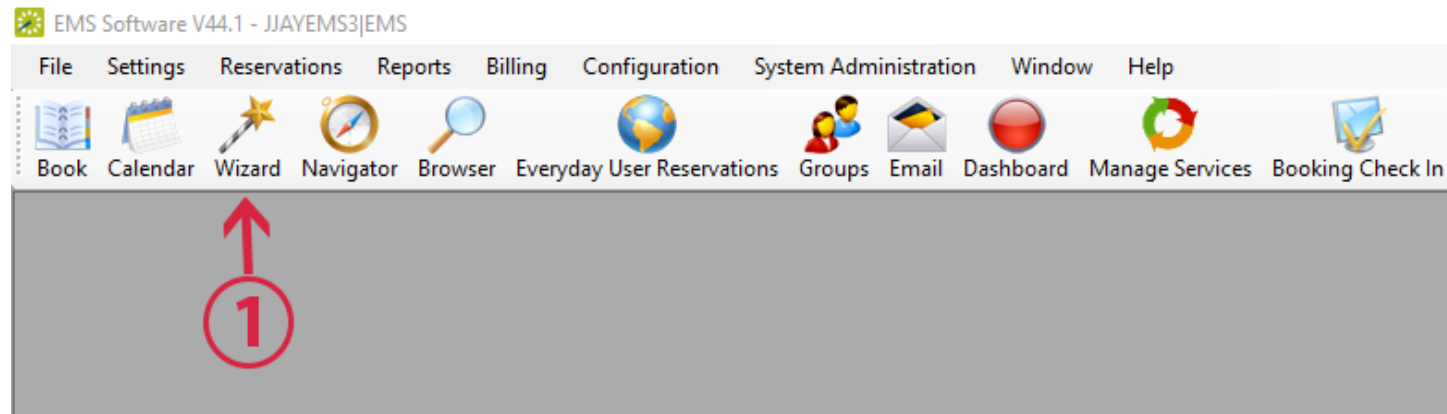


EMS Client User Guide

Using the Reservation Wizard



1) Click the **Wizard** button on the menu bar.

Reservation Wizard

Wizard Template: (none)

Options

Calendar Selected Dates (0) **2**

<< < September 2017 > >>

S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	<u>4</u>	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Date Pattern Clear Month Clear All

Time

Start: End:

Time Zone: Eastern Time

Setup/Teardown

Use Default: ☒ Minutes Setup: 0 Teardown: 0

Cancel Reset Group Info Next >

Location Features

Search

Method: ☒ Standard ☐ Best Fit ☐ Specific Room

Building: (all)

Room:

Location:

Room Specifications:

Type: (all)

Floor: (all)

Setup Type: (all)

Setup Count: 0

Status

Status: Reconfirm:

2) Select the date(s) you'd like to book as part of your reservation.

- Note: if making multiple bookings at the same time, the locations, date and time will be copied across each day you select. You can change those parameters after the reservation has been created.
- If the date is underlined, this means it is listed as a Special Date/Holiday. Click the date number to see the Special Date note.

Reservation Wizard

Wizard Template: (none)

Calendar Selected Dates (0)

<< < September 2017 > >>

S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Date Pattern Clear Month Clear All

Time

Start: End:

Time Zone: Eastern Time

Setup/Teardown

Use Default: ☒ Minutes Setup: 0 Teardown: 0

Cancel Reset Group Info

<< < October 2017 > >>

Search

Method: ☒ Standard ☐ Best Fit ☐ Specific Room

Date Pattern

Start Date: End Date:

☐ Daily

☒ Weekly

☐ Monthly

Every 1 week(s) on:

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday

☐ Thursday ☐ Friday ☐ Saturday

OK Cancel

- 3) (optional) To set recurring bookings, click on **Date Pattern**.
- 4) (optional) Set your Start Date and End Date for the recurrence and set the frequency within the date range.

Reservation Wizard

Wizard Template: (none) Options

Calendar Selected Dates (0)

<< < September 2017 > >>

	S	M	T	W	T	F	S
	27	28	29	30	31	1	2
	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
	1	2	3	4	5	6	7

Date Pattern Clear Month Clear All

Time

Start: End: Time Zone: Eastern Time

Setup/Teardown

Use Default: ☒ Minutes Setup: 0 Teardown: 0

Cancel Reset Group Info Next >

Location Features

Search

Method: ☒ Standard ☐ Best Fit ☐ Specific Room

Building: (all)

Room:

Location:

Room Specifications:

Type: (all)

Floor: (all)

Setup Type: (all)

Setup Count: 0

Status

Status: Reconfirm:

5) Set the start and end times for the booking(s).

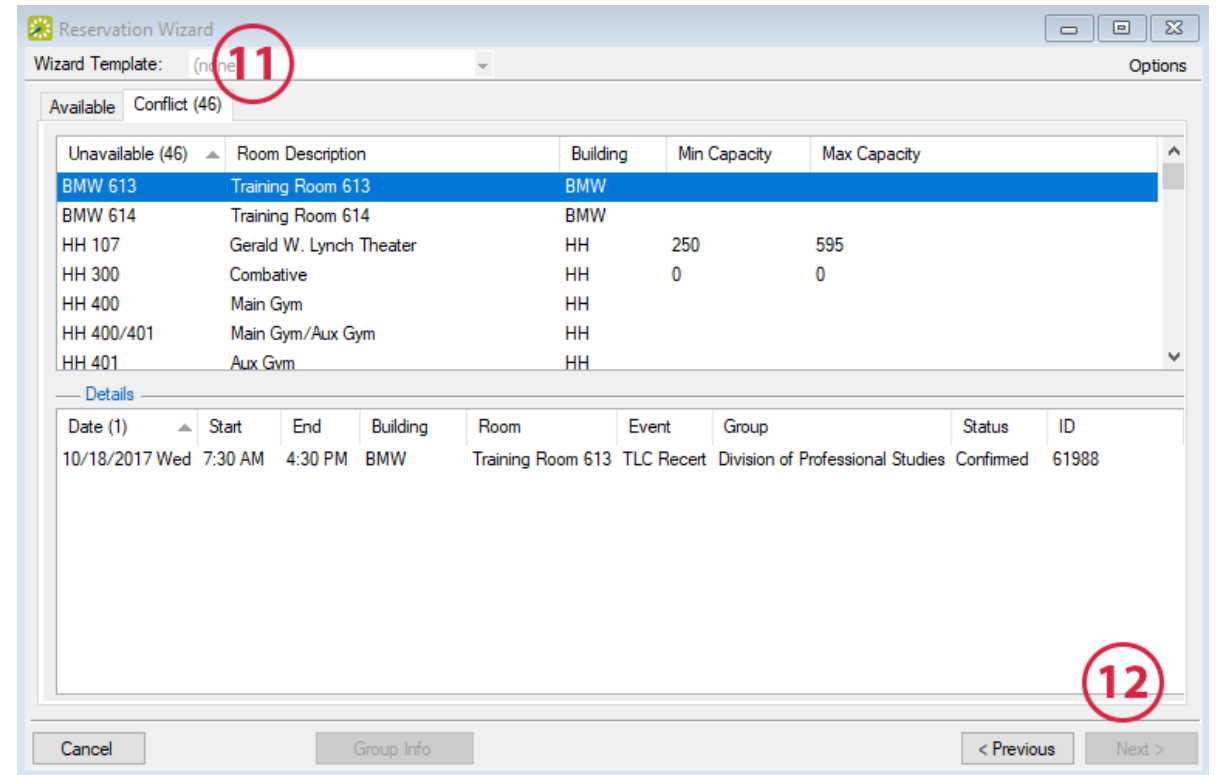
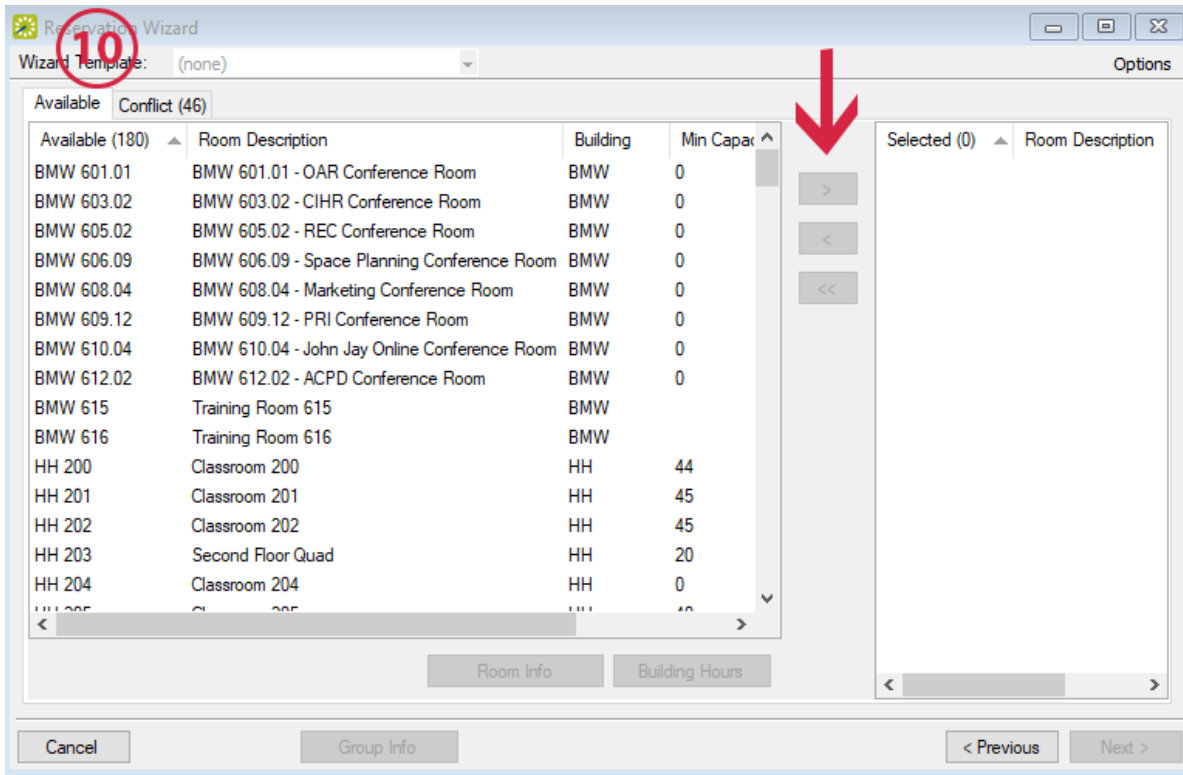
6) Set the beginning status for the reservation.
Note: refer to the Status Workflow guide for information on statuses.

7) When searching for a location, you have multiple options:

- Standard: allows you to select a building and will allow you to choose from all available locations at a later step.
- Best Fit: allows the system to generate a list of rooms that best fits your selected parameters.
- Specific Room: allows you to immediately choose a specific room for your reservation.

8) (optional) To filter by Room Specifications, use these options.

9) Click **Next**.



- 10) Choose a location from the list on the left and click the top arrow to add it to the list. To remove a location from the Selected list, click the middle arrow.
- 11) Review the **Conflict** tab to see a list of rooms that are unavailable and view information on the conflicting bookings.
- 12) Click **Next**.

Reservation Wizard

Wizard Template: (none)

Options

Event

Event Name: 13

Event Type: (none) 13

VIP Event: ☐ Video Conference: ☐

Source: (not specified)

Group/Contacts

Group: 14

1st Contact: (none)

Temp Contact:

2nd Contact: (none)

Temp Contact:

Phone: Fax:

Email Address:

Room Setup Billing Other Everyday User Applications User Defined Fields

Setup Type: (none)

Setup Count: 0

Cancel Group Info < Previous Finish

13) Enter the Event Name and Event Type.

- The Event Type will be applied to the entire reservation. If necessary, you can change the Event Type for each booking after the reservation has been created.

14) Enter the group for which the reservation is being created. When selecting contacts, if you need to set a temporary contact you can do so by clicking the dropdown menu next to the contact entries and selecting **(temporary contact)**.

Room Setup Billing Other Everyday User Applications User Defined Fields

Setup Type: (none) 

Setup Count: 0

15

Room Setup Billing Other Everyday User Applications User Defined Fields

Pricing Plan: (none)  Payment Type: (none) 

Billing Reference:  PO Number: 

Sales Category: (none)  Salesperson: (none) 

16

15) On the **Room Setup** tab, choose a Setup Type for the reservation.

- If necessary, you can change the Event Type for each booking after the reservation has been created.
- Enter the Setup Count.

16) On the **Billing** tab, select a Pricing Plan and Sales Category for the reservation if they are to be different to the defaults set for the group.

Room Setup Billing Other Everyday User Applications User Defined Fields

Event Coordinator: Chinua Thomas 17

Estimated Event Attendance: 0

Calendar Style: Standard

URL:

Room Setup Billing Other Everyday User Applications User Defined Fields

Sequence (14)	Field	Value	Required
10	Event Description		Yes 18
20	VIPs	no	
30	Guest Speakers	no	
40	Admission Fee		
50	On-Site Transactions		
60	Funding Source		

Set Value Clear Value 19

Cancel Group Info < Previous Finish

17) On the **Other** tab, select the Event Coordinator for the event if it is different to the default set for the group, then enter the Estimate Event Attendance.

18) On the **User Defined Fields** tab, complete each field as necessary.
 a. Note: an Event Description is required to created a reservation.

19) Click **Finish** to create your reservation.