STSR Help

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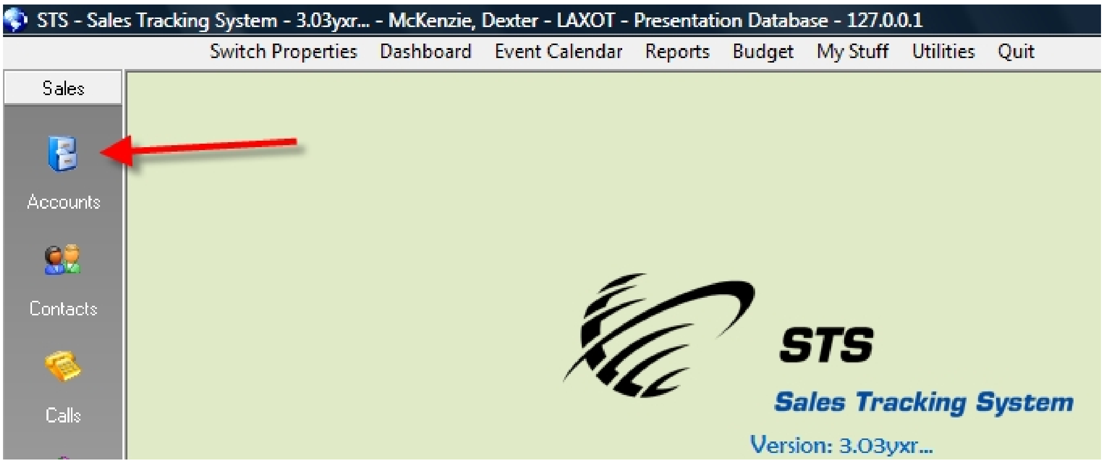
Accounts

Accounts

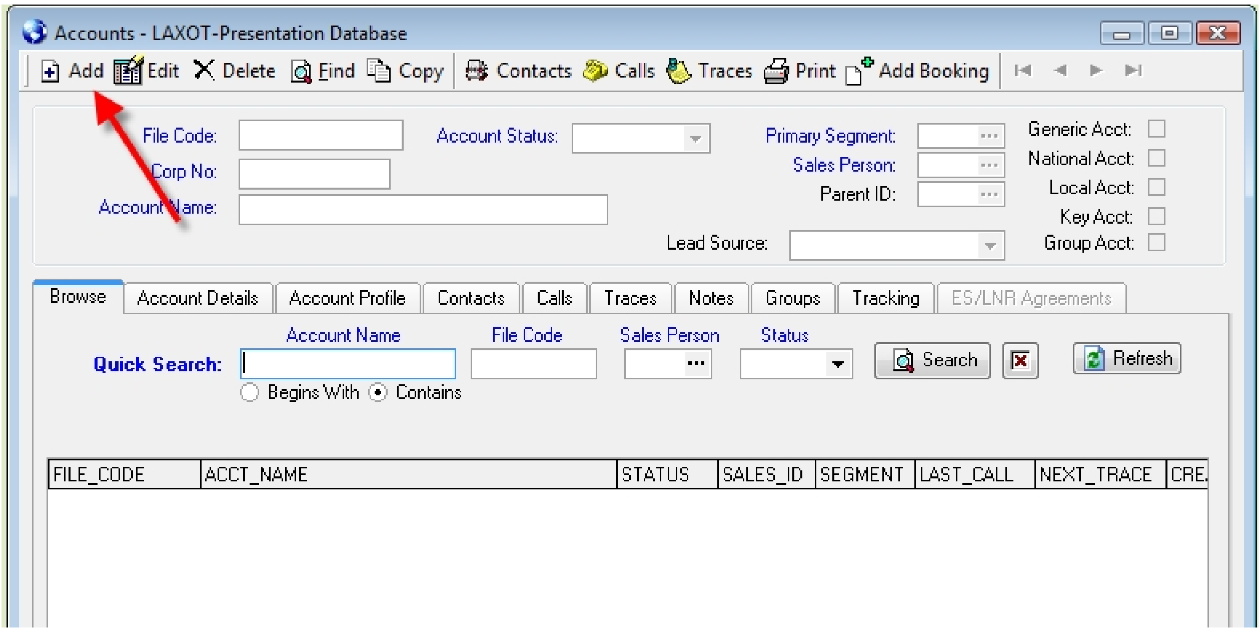
STS is an Account based system. This means you must have an account set up, with a File Code, to enter any information into the system. STS can help you effectively manage your accounts and all of the pertinent information and/or activity for these accounts. Account, contacts, calls (activities) and traces are the main components of account management in STS.

To open the account screen, click Accounts on the left menu.



If you are searching for an account, use the **Quick Search** section in the middle of the screen to enter information to search by.   You can enter part of an account name and click the **Search** button.

If adding a new account, click the **Add** button.



Accounts

In all screens in STS, the required fields are labeled in Blue.

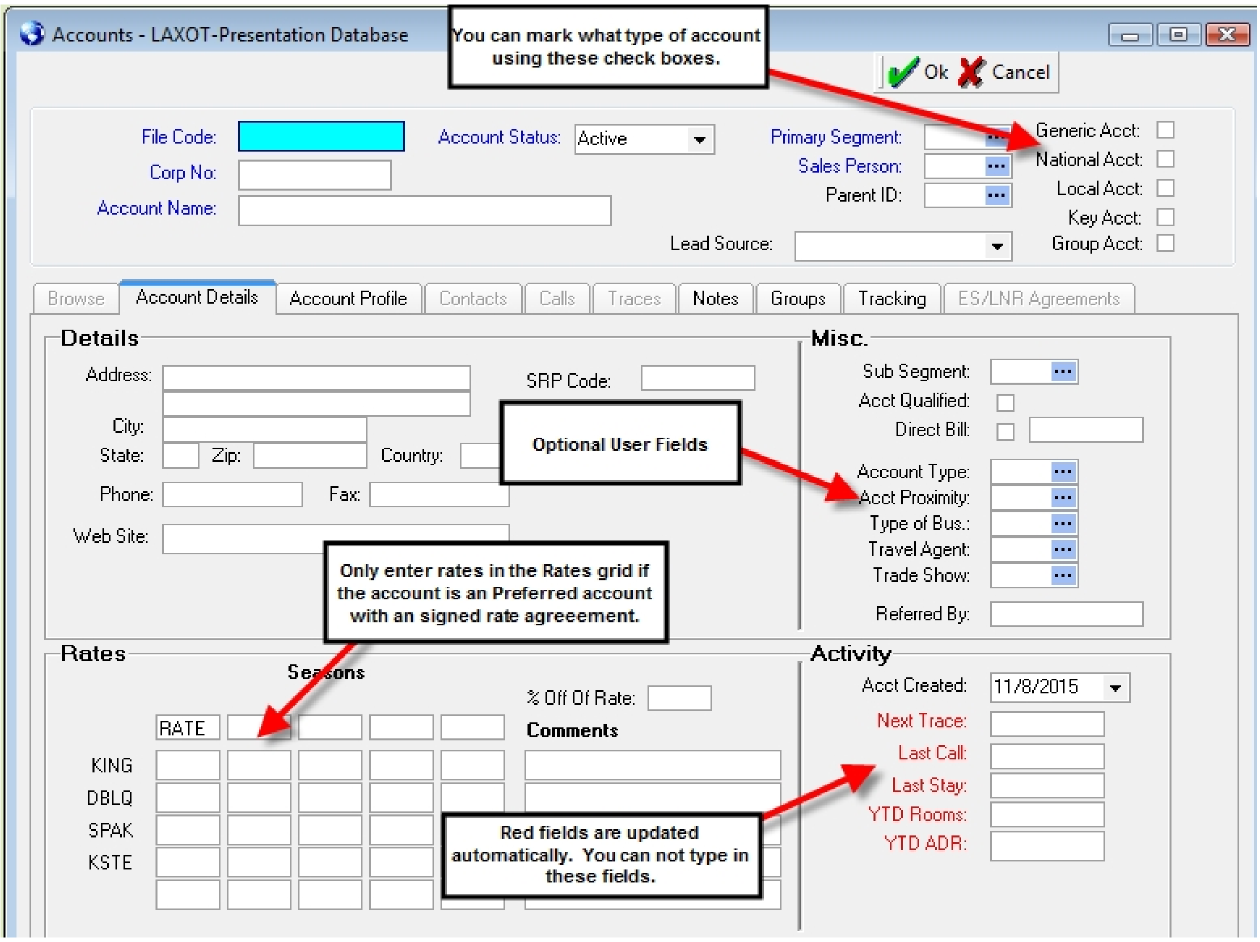
File Code – the File Code is the main id for an account. The File Code will be used throughout STS to identify the account. The File Code can be up to 10 letters/numbers.

Corp No – the Corp No is used to identify the account for tracking. The Corp No can be up to 9 letters/numbers. The Corp No will default to be the same as the File Code if you do not change.

Account Status – If the account is a prospect it is recommended to choose Hit List, otherwise chose Active.

Primary Segment – Choose the primary market segment by clicking the lookup button

Sales Person – Choose the sales person who primarily owns this account by click the lookup button



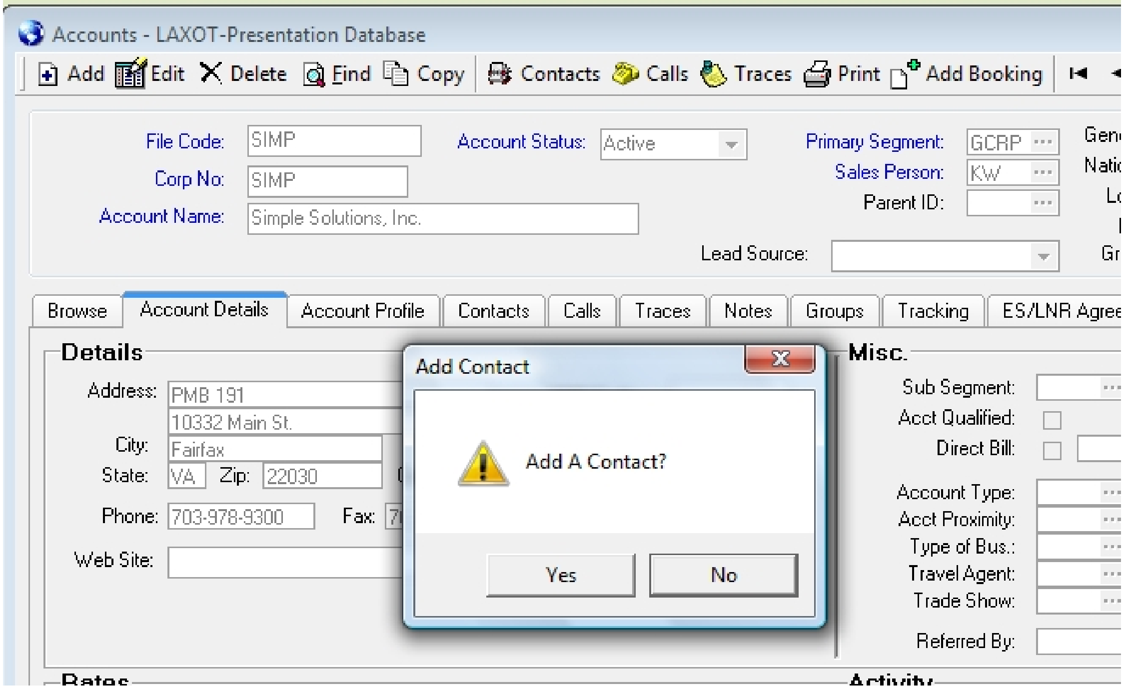
Although the other fields on the account screen are optional, some can provide important information about the account.

The **Profile** tab can capture important information on top accounts.

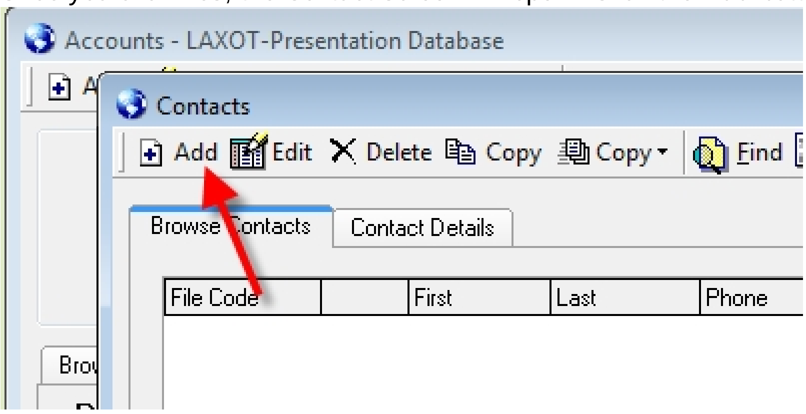
When you have finished entering information in the needed fields, click the **OK** button to save.

Contacts

Once you click OK to save the account you will be asked if you would like to **Add A Contact**. Click Yes if you would like to add a contact.



Once you click Yes, the Contact screen will open. Click the **Add** button.



Contacts

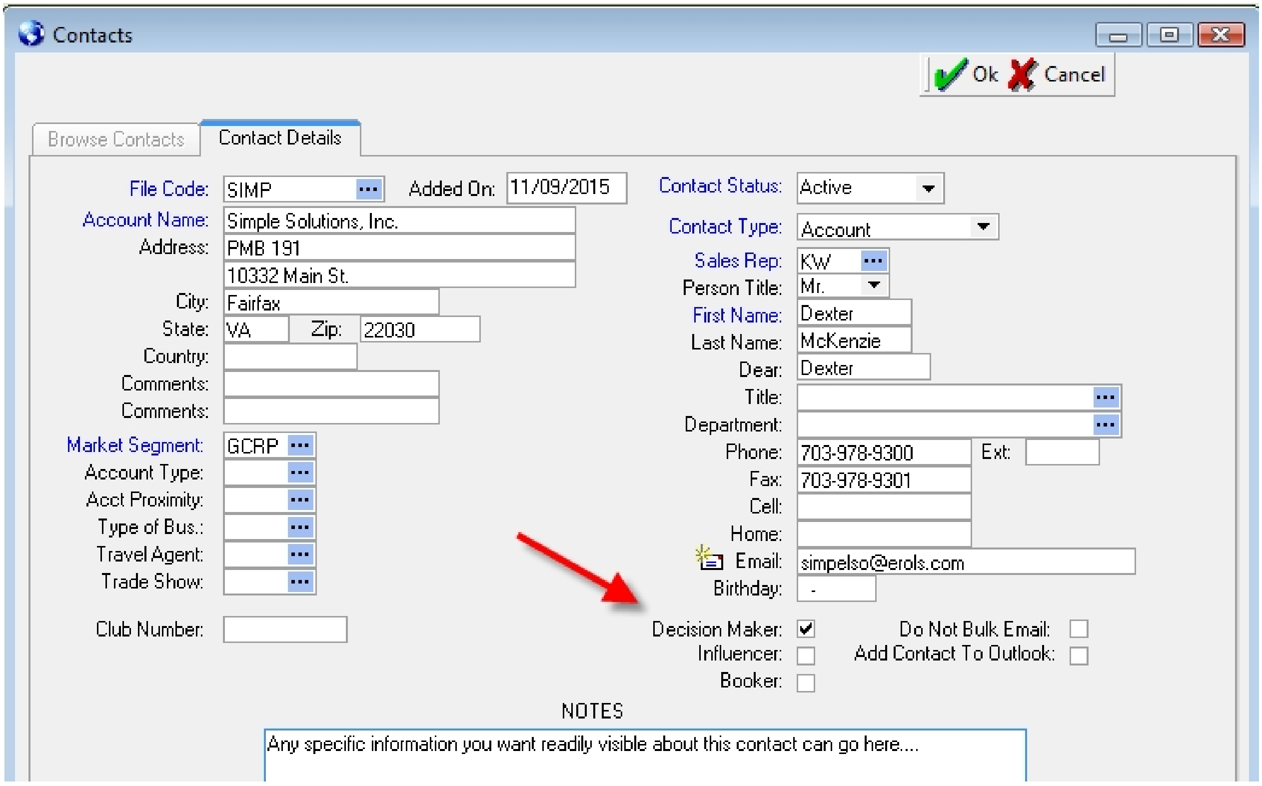
Contacts

Once you click OK to save the account you will be asked if you would like to **Add A Contact**. Click Yes if you would like to add a contact. When the Contact screen appears, click the **Add** button. The File Code from the account you added will appear in the File Code field. Press the Tab key. The information from the account will automatically fill in the appropriate fields. You can make any necessary changes. You can add an unlimited number of contacts attached to an account.

It is recommended you fill in as much information as you have available for the contact. All of the information entered here will flow into other screens when you choose this contact. When adding a contact you can assign the contact to any Sales Rep listed on the lookup.

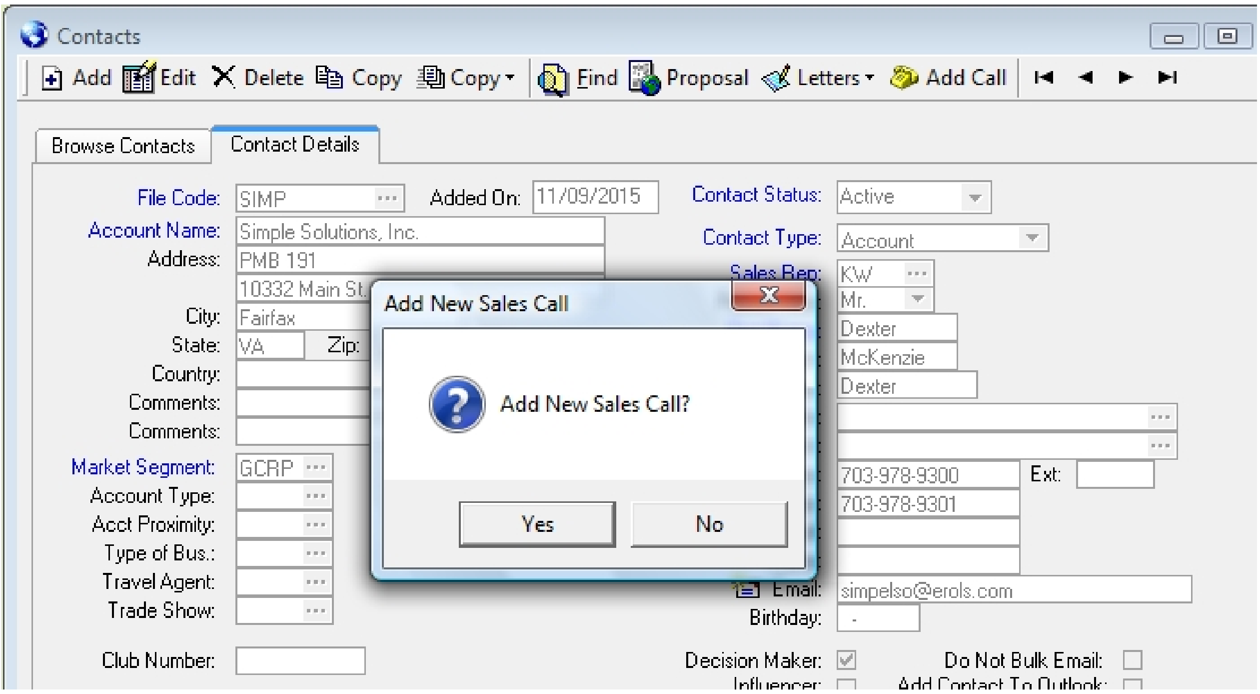
If this contact is a decision maker, check the Decision Maker box at the bottom of the screen. Contacts marked as Decision Makers will appear in Red on the grid on the Contact screen.

The Notes box at the bottom of the screen is a convenient place to enter specific information about this contact that would be helpful for you or others to view.



Contacts

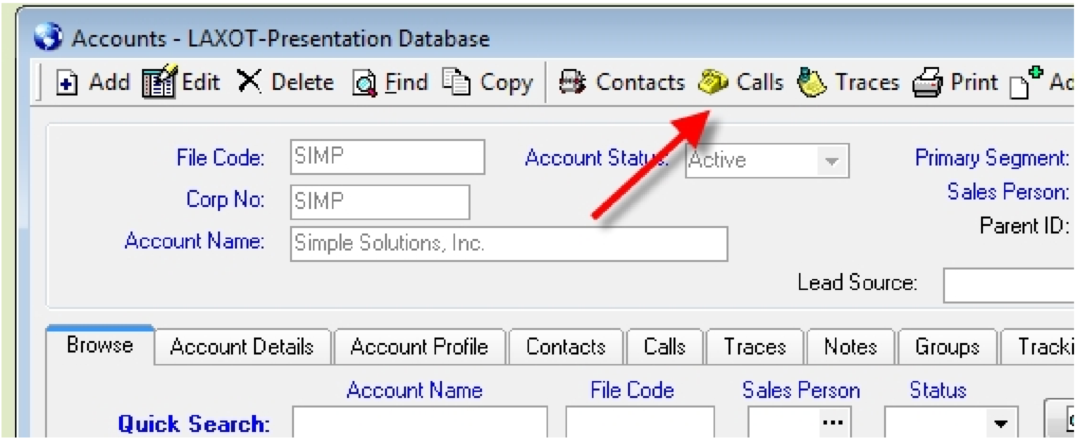
Once you click OK to save the Contact you will be asked if you would like to **Add a Sales Call**. Click Yes if you would like to add a sales call (activity).

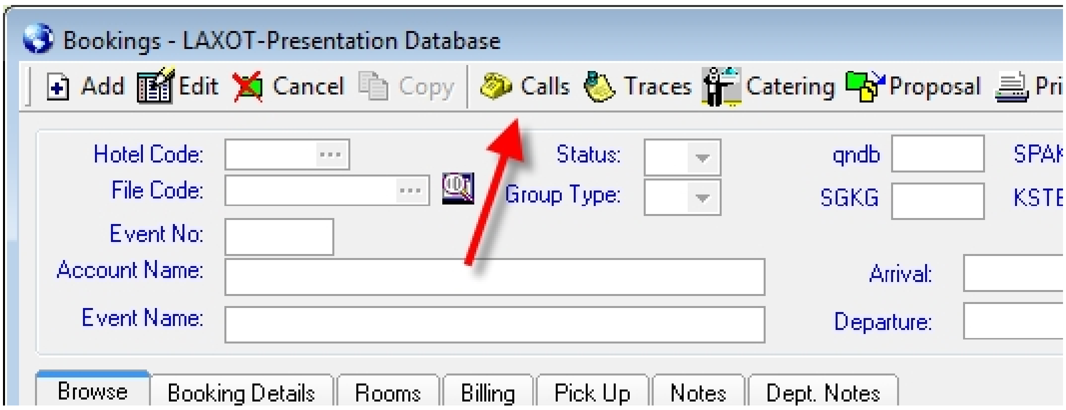


Calls

Sales Calls (Activities)

In STS you log completed activities (phone calls, appointments etc) under Sales Calls. You can access the Sales Call screen from several places. The left menu on the main screen, the Calls button on the Account screen and the Calls button on the Booking screen.



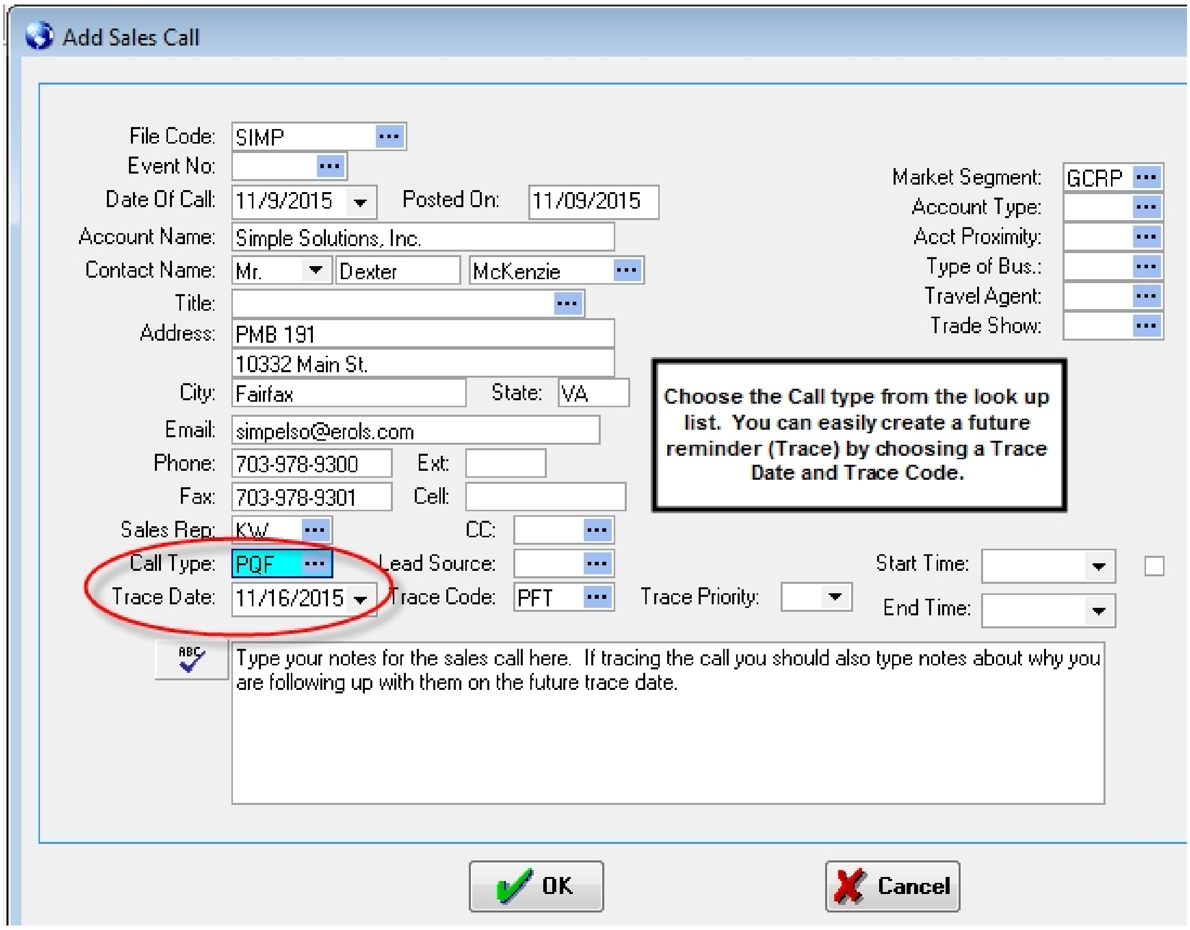


Sales Calls (Activities) - Add

In STS you log completed activities (phone calls, appointments etc) under Sales Calls. You can access the Sales Call screen from several places. The left menu on the main screen, the Calls button on the Account screen and the Calls button on the Booking screen.

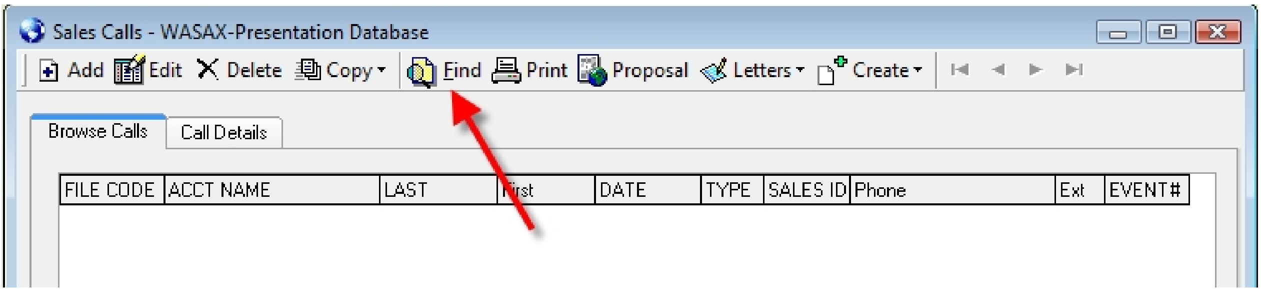
To add a call,

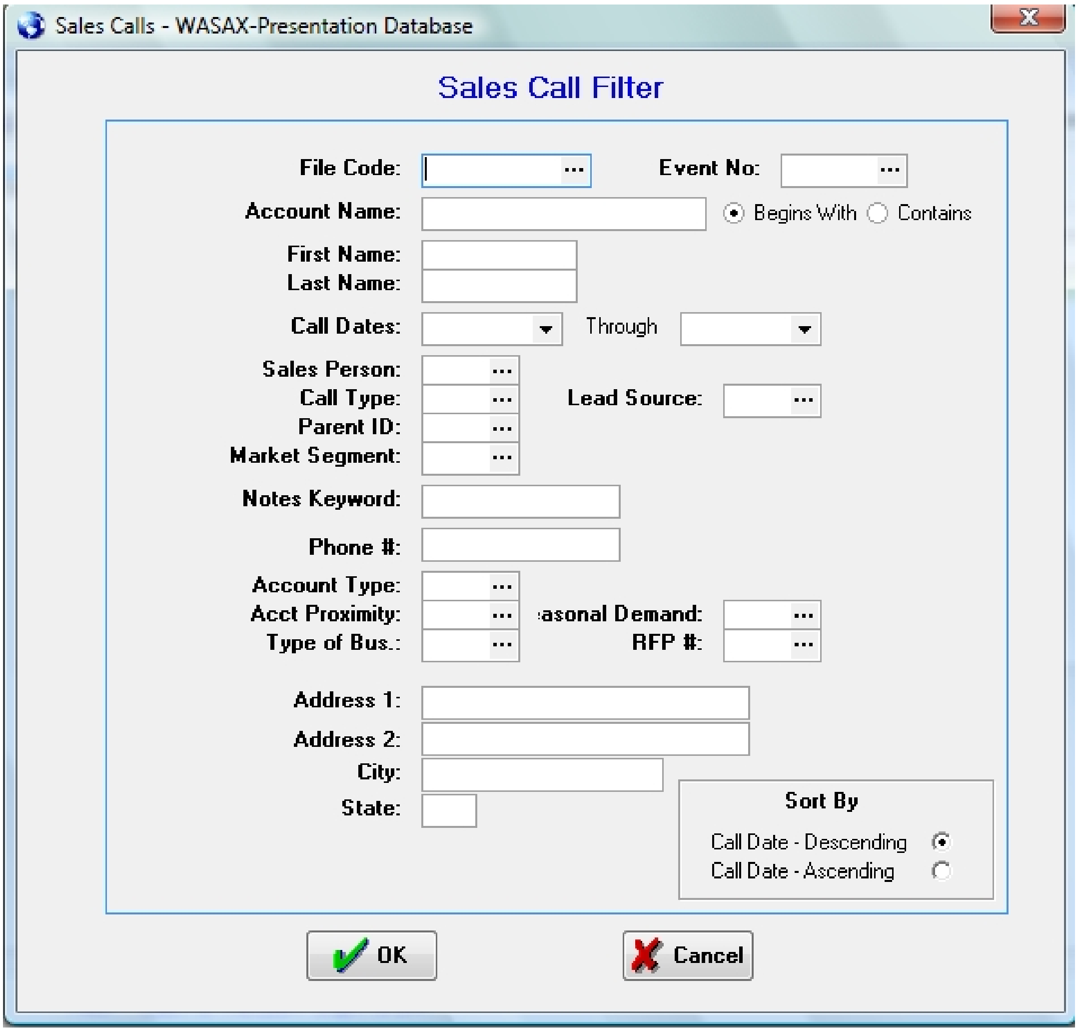
1. Click the **Add** button. Choose the **File Code** from the lookup list.
2. If adding a call for an existing account, click the lookup button to the right of the **Contact Name** to choose the contact. If logging a call under a generic account, type the contact info in.
3. Choose a **Call Type** from the lookup list.
4. If you want to create a future reminder (Trace), choose a **Trace Date** and an optional Trace Code.
5. The CC (carbon copy) field is for copying another team member on the "trace" if you enter a trace date. Most times the CC field would be left blank.
6. Enter the **Notes** from the call (activity). If creating a future trace it's recommended you also enter a note on why you are contacting them in the future. The notes from the call will be attached to the notes for the future trace.
7. Click **OK** to save. You have just saved the Call. If you chose a Trace Date, a trace was automatically created also for that future date.



Sales Calls (Activities) - Find

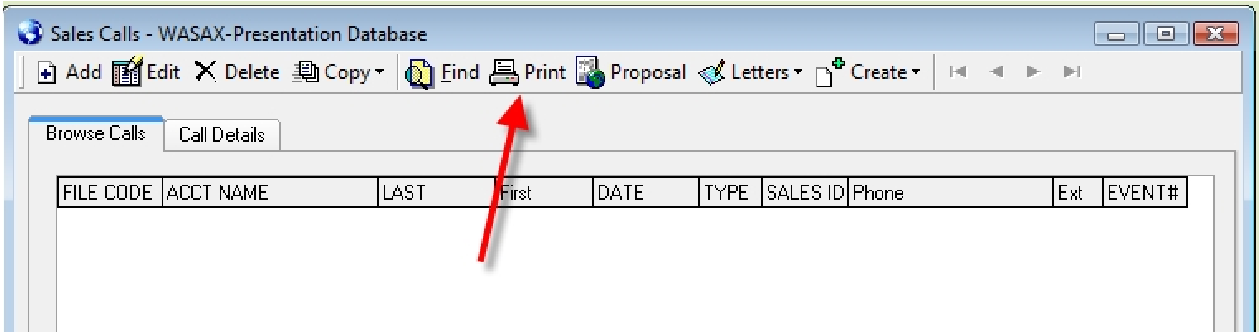
The **Find** button allows you to quickly and easily find any sales calls entered into STS. The more fields you fill in the more specific the search.

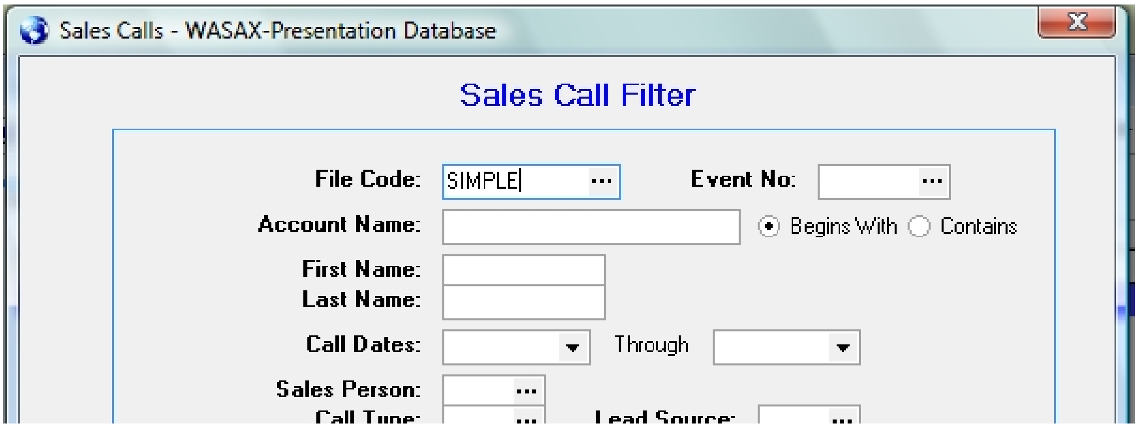




Sales Calls (Activities) - Print

The **Print** button allows you to print a sales call report including the notes for each call. When you click the Print button you are presented with the same Find window. After filling in your search criteria, click Ok. You will be asked if you want to print the address for the account. After choosing Yes or No the report will appear in the print preview.






Today's Date: 11/12/2015
Page: 1

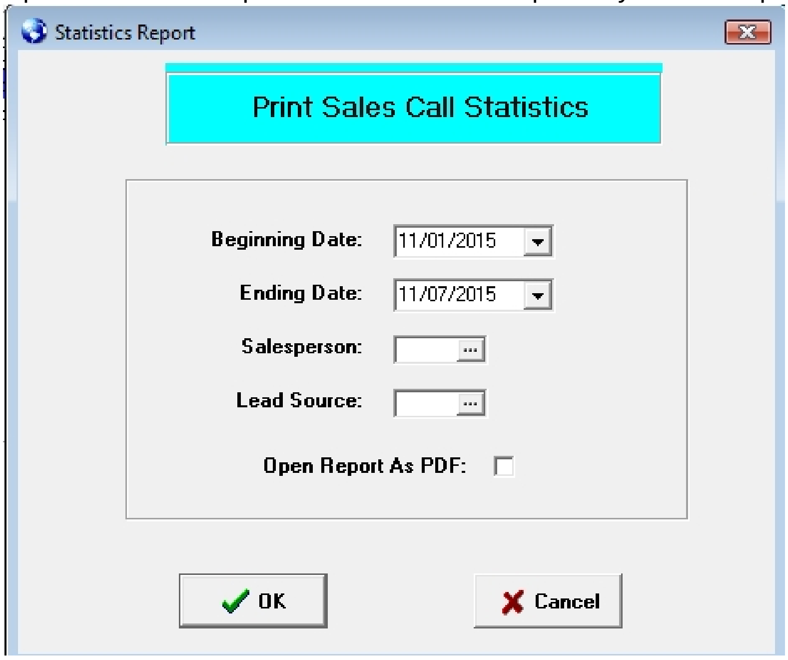
Your Hotel Name Here
Sales Call Report
File: SIMPLE
Dates: All Dates
Call Types: All Call Types
Salesperson: All Salespersons

File/Evt # Posted On	Account Name / Date / Description	Contact Name / Notes	Phone#	Ext.	Sales ID	Trace Date
SIMPLE 11/9/2015	Simple Solutions, Inc. 11/16/2015 PQF simpleso@erols.com	Mr. Dexter McKenzie Discussed their training schedule for next year. They will be finalizing the budget within the next 2 weeks. Will follow up then.	703-978-9300		MLH	11/30/2015
SIMPLE 11/9/2015	Simple Solutions, Inc. 11/9/2015 PQF simpleso@erols.com	Mr. Dexter McKenzie My notes for call would go here...when tracing the call always include notes on why you are calling them back...	703-978-9300		MLH	11/16/2015

Sales Calls (Activities) – Sales Call Stat Report

You can also print statistics on how many calls have been entered by sales person by call type. This report is very helpful especially if you have goals for entering a certain number of activities.

To print the report click Reports | Sales Call Stat Report. Choose the range of dates you want to print the report for. You can optional choose the sales person you want to print for or leave blank for everyone.



Todays Date: 11/12/2015

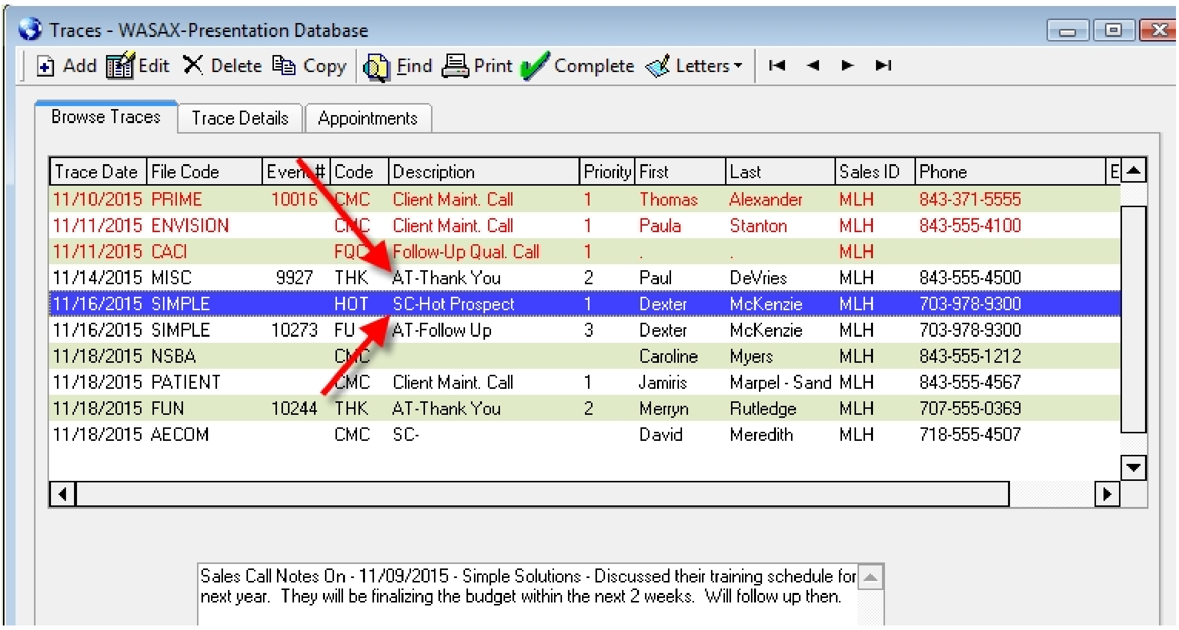
Your Hotel Name Here
Sales Call Statistics Report
Dates: Between 11/01/2015 and 11/07/2015
Salesperson: MLH-Mark Holbrook

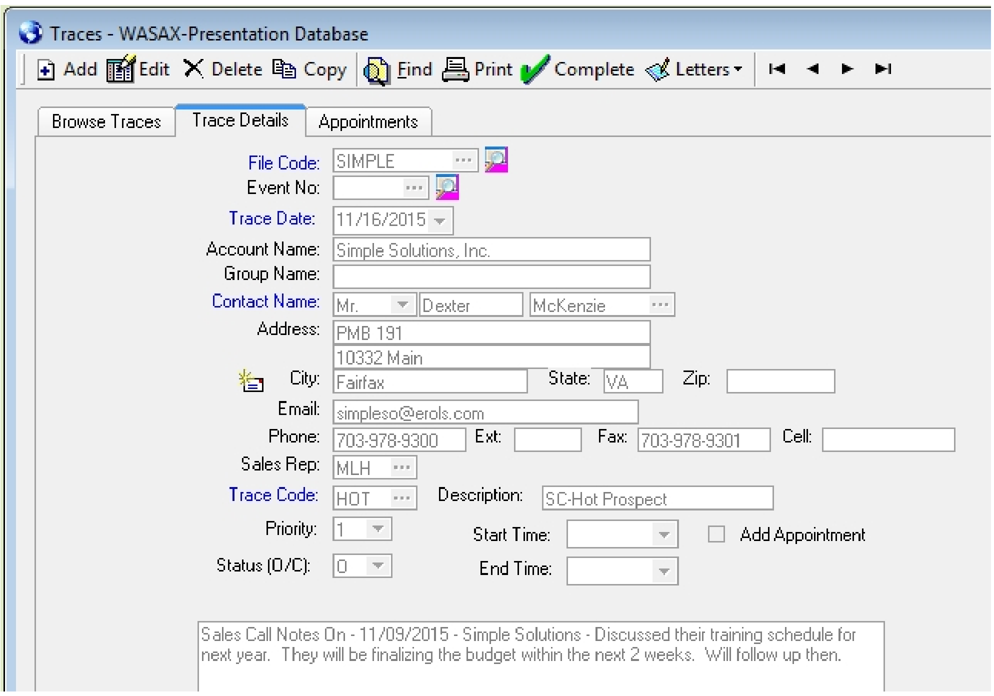
Sales ID	Salesperson	Call Code	Call Description	# Of Calls	Call Goal	Variance
MLH	Mark Holbrook	APP	Appointment	0	1	-1
MLH	Mark Holbrook	IC	Inquiry Call	1	0	1
MLH	Mark Holbrook	LNR	New LNR/CNR Account	0	1	-1
MLH	Mark Holbrook	OSC	Outside Sales Calls	0	5	-5
MLH	Mark Holbrook	PQF	Prospecting Call	2	12	-10
MLH	Mark Holbrook	RFP	Internet Leads / RFP's	0	3	-3
MLH	Mark Holbrook	RGT	Book/Re-book Group	0	2	-2
MLH	Mark Holbrook	SSI	Site Inspection	1	1	0
			Calls WithOut Goals	1		
			Calls With Goals	3	25	-22
			Total Calls	4	25	-21

Traces

Traces

Traces in STS are designed to remind you of future actions and activities that must be taken. Most of your traces will come from tracing sales calls and/or automatic booking traces. Traces that come from other modules in STS will have a letter code in the Description. “SC-“ indicates the trace came from entering a Sales Call. “AT-“ traces come from the automatic booking traces that appear whenever you enter a new booking. “LB-” traces come from entries in the Lost Business screen etc. Traces in Red indicate the trace has a due date earlier than today. The details included on a trace should give you all of the information needed to follow up with the client allowing you to complete (close) the trace.



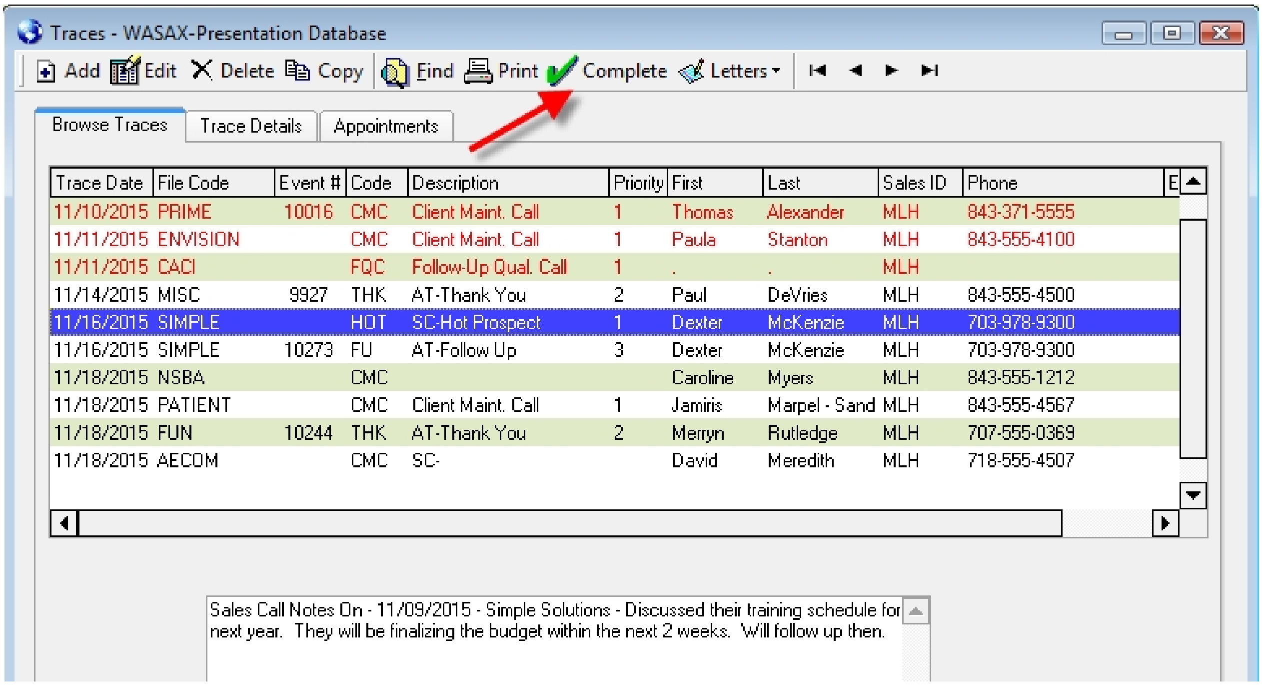


Traces – Completing (closing)

You can use the Add and Edit buttons to add new traces or modify existing traces but you will use the **Complete** button most frequently to close traces once you have completed the task. Once you complete (close) the trace you will be prompted if you would like to add a new Sales Call recording the notes from the completed activity. If you answer Yes, you will be presented with a “Add Sales Call” screen allowing you to record the details of the completed task. When adding the new sales call you will have the opportunity to enter a future trace date to follow up with the client.

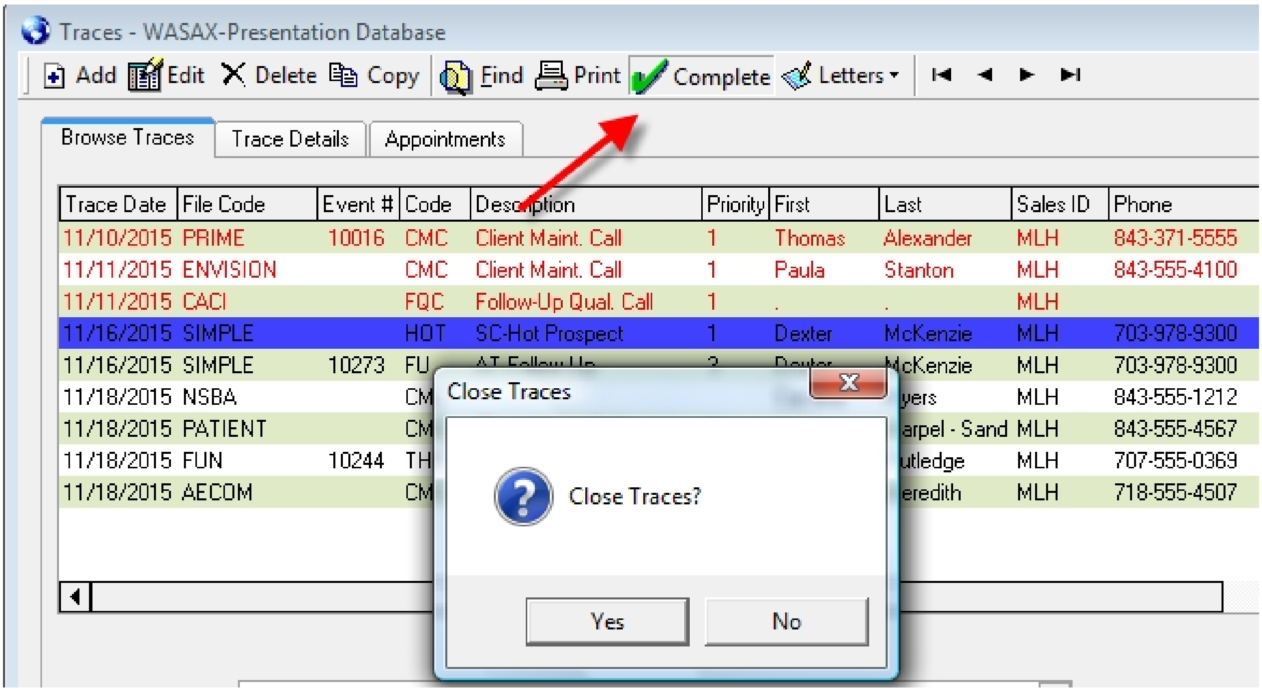
You do not have to answer Yes each time to add a new sales call. Completing AT (automatic booking traces) are an example of traces you would complete and not typically need to enter a follow up sales call for. Activities where you had direct client contact would be situations where you would probably want to answer Yes to record a new sales call.

Finally, traces are designed to be completed and disappear from your to do list. That means editing the trace, and entering any notes you want to keep about the activity, is not recommended. All notes about sales activities you want to keep should be entered under Sales Calls.



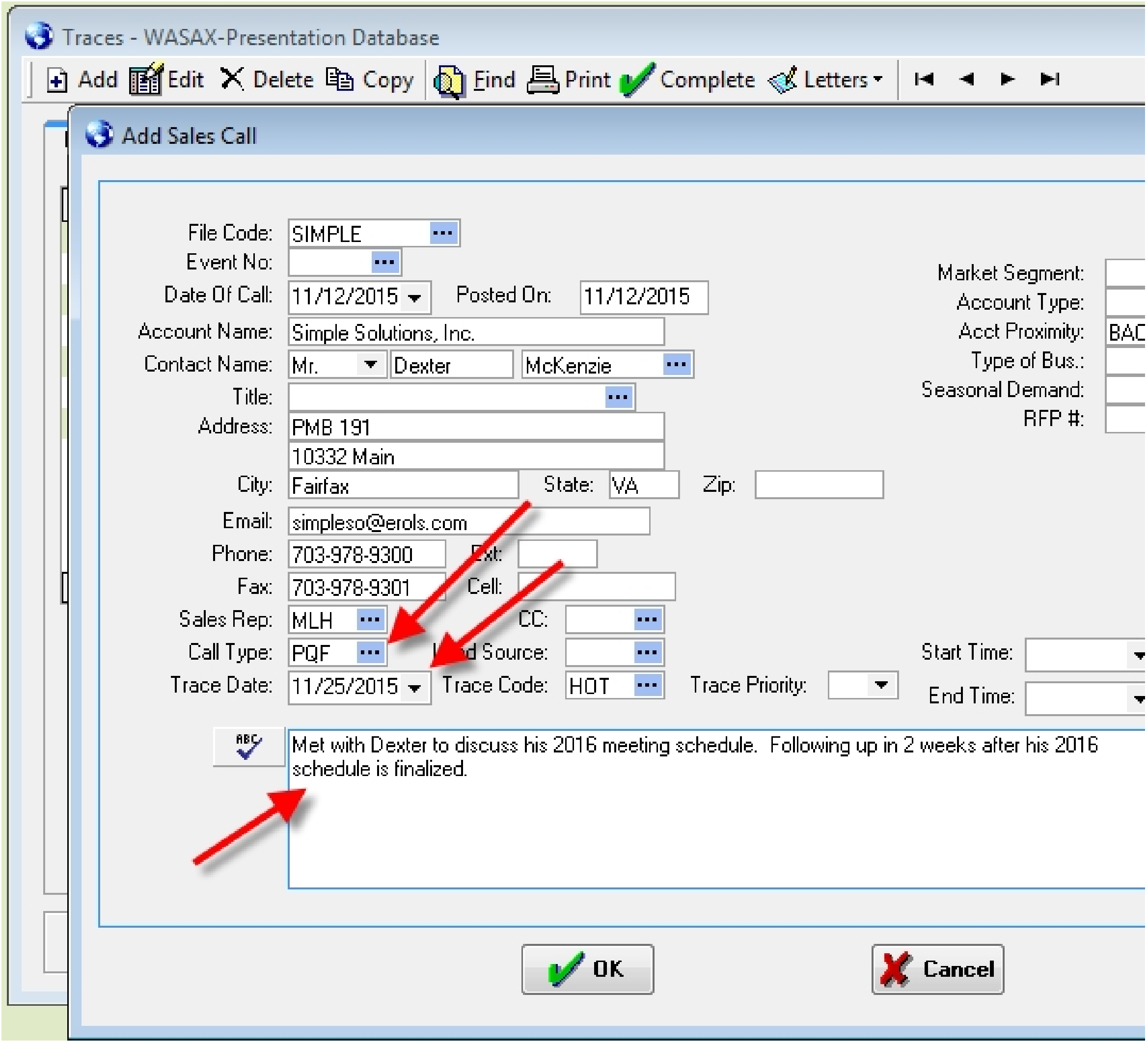
Traces – Completing (closing)

Highlight the trace you want to close and click the **Complete** button. You will be asked if you would like to **"Close"** the trace. If you click Yes, the trace will disappear from the grid and you will be asked if you would like to **"Add New Sales Call"**. Not all traces would result in adding a new sales call. Typically activities that involved having direct client interaction are situations where answering Yes would be recommended to record the notes.



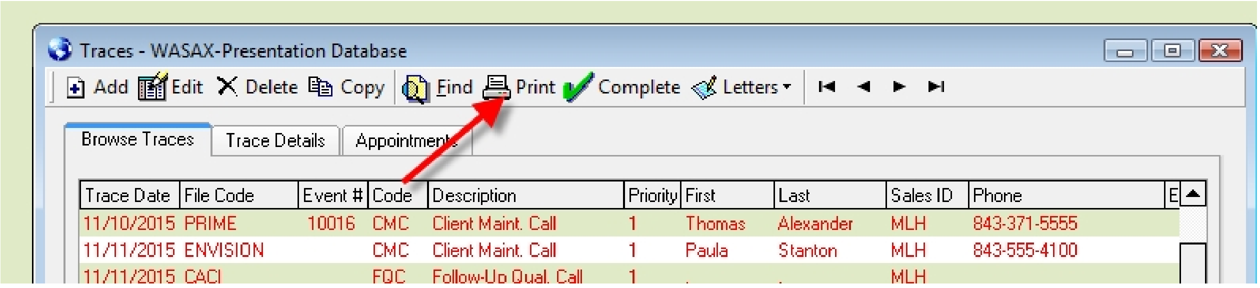
Traces – Completing (adding new sales call)

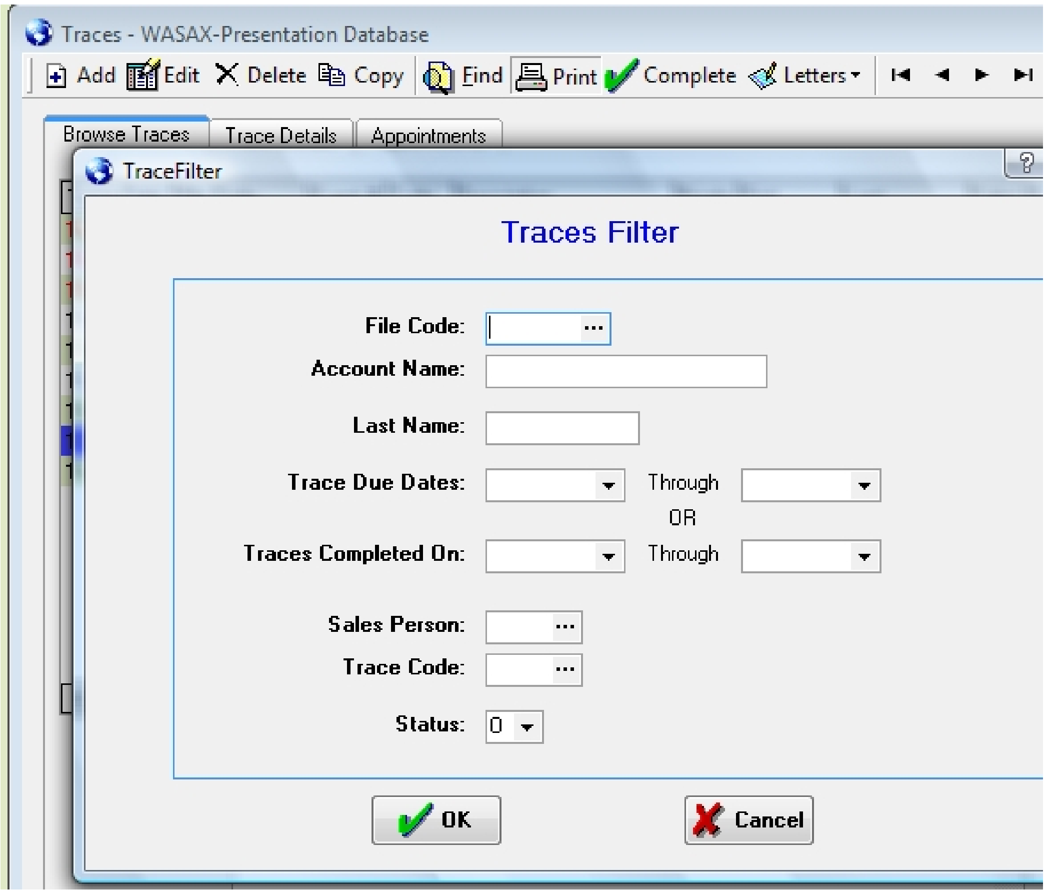
If you answer Yes to the question "Add New Sales Call?", a Add Sales Call screen will appear. All of the information from the Trace you just completed will be carried over to the Add Sales Call screen. From here you would choose the **Call Type**, enter your **Notes** and enter a **Trace Date/Code** if you would like to create a future reminder (trace) for this client. Once you have filled in those fields, click OK to save.



Traces – Printing

The **Print** button allows you to print a trace report. When you click the Print button you are presented with the same Find window. After filling in your search criteria, click Ok. The report will appear in the Print Preview.





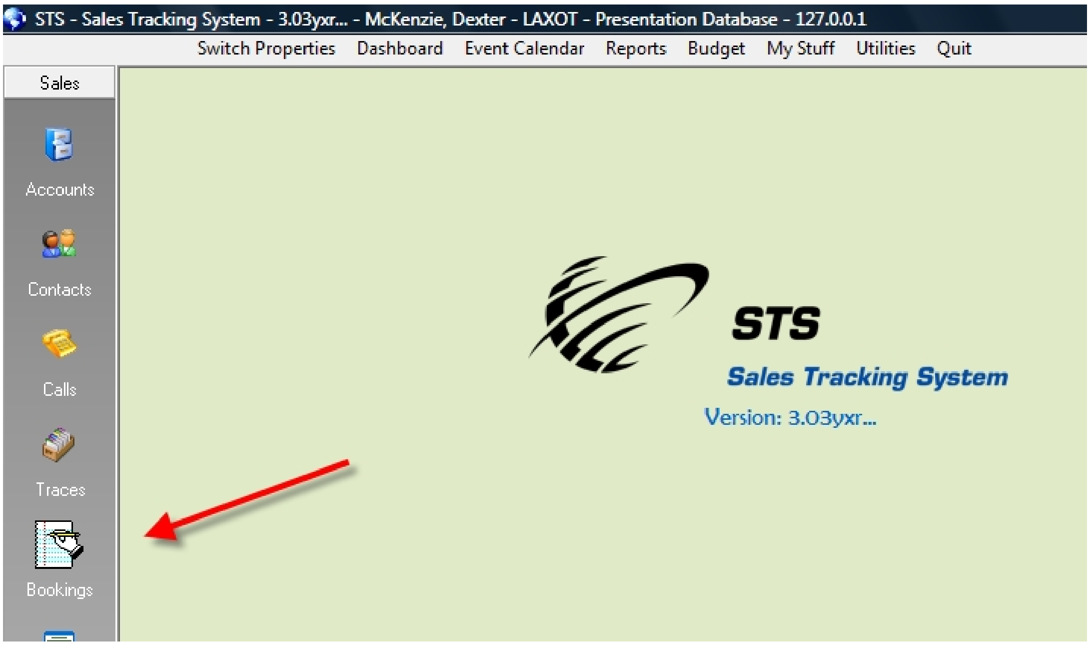
Bookings - Initial Entry

Bookings

The booking screen in STS is where you enter group information.   This would include groups with sleeping rooms only, catering only or groups with sleeping rooms and catering. Most of the information contained on the booking screen is relevant for both.

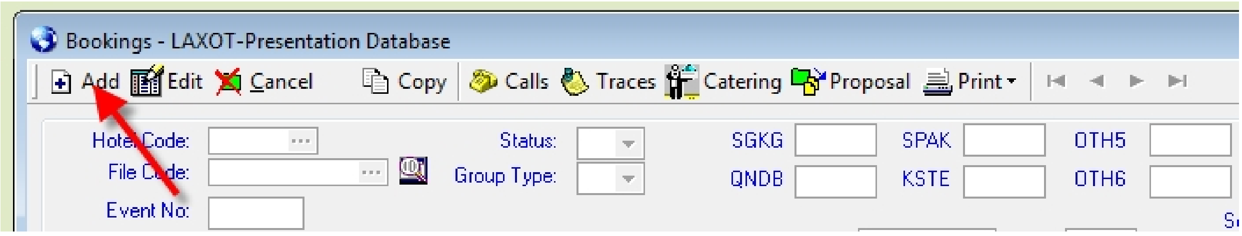
Below is a recap of the steps for adding a booking with catering and generating the BEO. You will find detailed steps on subsequent pages after the recap.

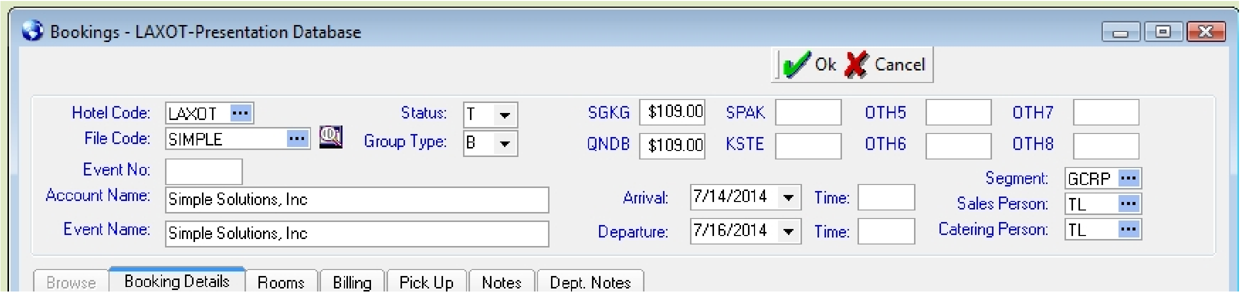
1. Create an account if the account does not already exist.
2. Add the booking from the booking screen.
3. Once the booking is created you can add the catering functions by clicking the Catering button on the booking screen toolbar.
4. Once the catering function(s) are created you can add the menu/service items by clicking the Menu/Service tab on the catering screen.
5. Once you have added the menu/service items you can click the Print button on the Catering screen and either Merge the BEO or Print the BEO depending on which document you use.



Bookings

To open the booking screen, click Bookings on the left menu. Once the booking screen opens, click the **Add** button.



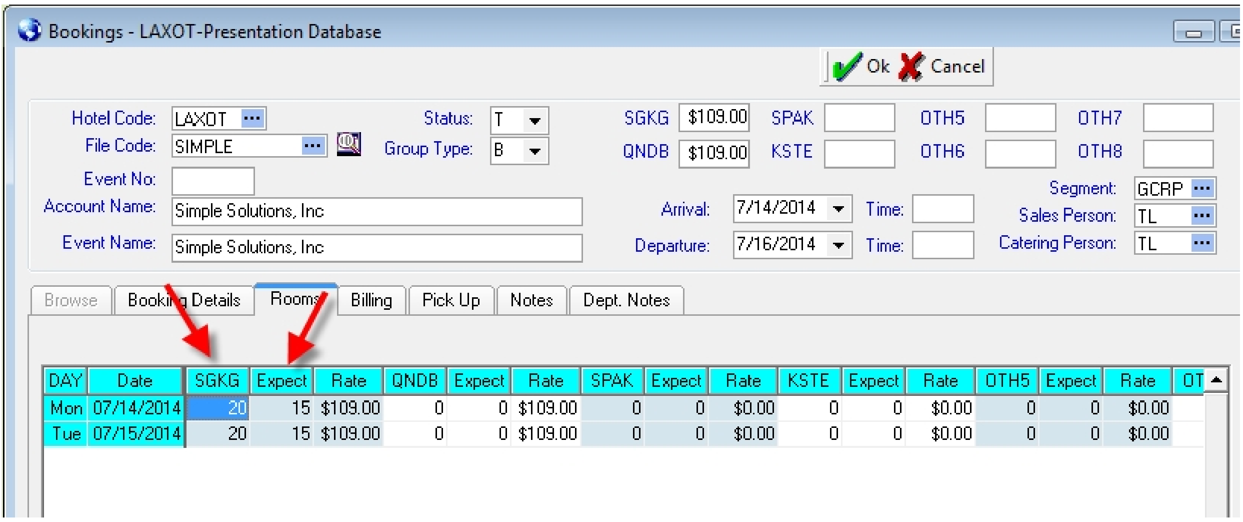


- Enter or choose the **File Code** by clicking the lookup button to the right of the File Code field. Once you tab off the File Code field certain fields will be filled in from the account profile.
- Change the **Event Name** if it's different than the Account Name.
- Choose **Status** from the drop down (T-Tentative, D-Definite, P-Prospect)
- Choose the **Group Type** (R-Rooms Only, C-Catering Only, B-Both)
- Enter the room rates in the applicable rate fields (leave blank if Catering Only)

Bookings - Rooms Tab

Bookings…Rooms Tab

- Click the drop down for **Arrival** and choose the Arrival Date.
- Click the drop down for **Departure** and choose the Departure Date. You can choose the same date for the Arrival and Departure if the booking is for a one day catering function. Once you tab off the Departure Date you will be taken to the Room tab. You can enter the rooms (if applicable). The first column of each section is for "Gross" Rooms. Gross rooms will print on the contract for the client. The Expect column is for "Net" rooms. Net rooms is the number of rooms you anticipate the group actually picking up. The Expected rooms are also called Wash Rooms. All Forecast reports use the rooms entered in the Expect column. The client does not see the Expect rooms, only Gross. If the booking is a **Catering Only** ignore the Room tab and return to the Booking Details tab.



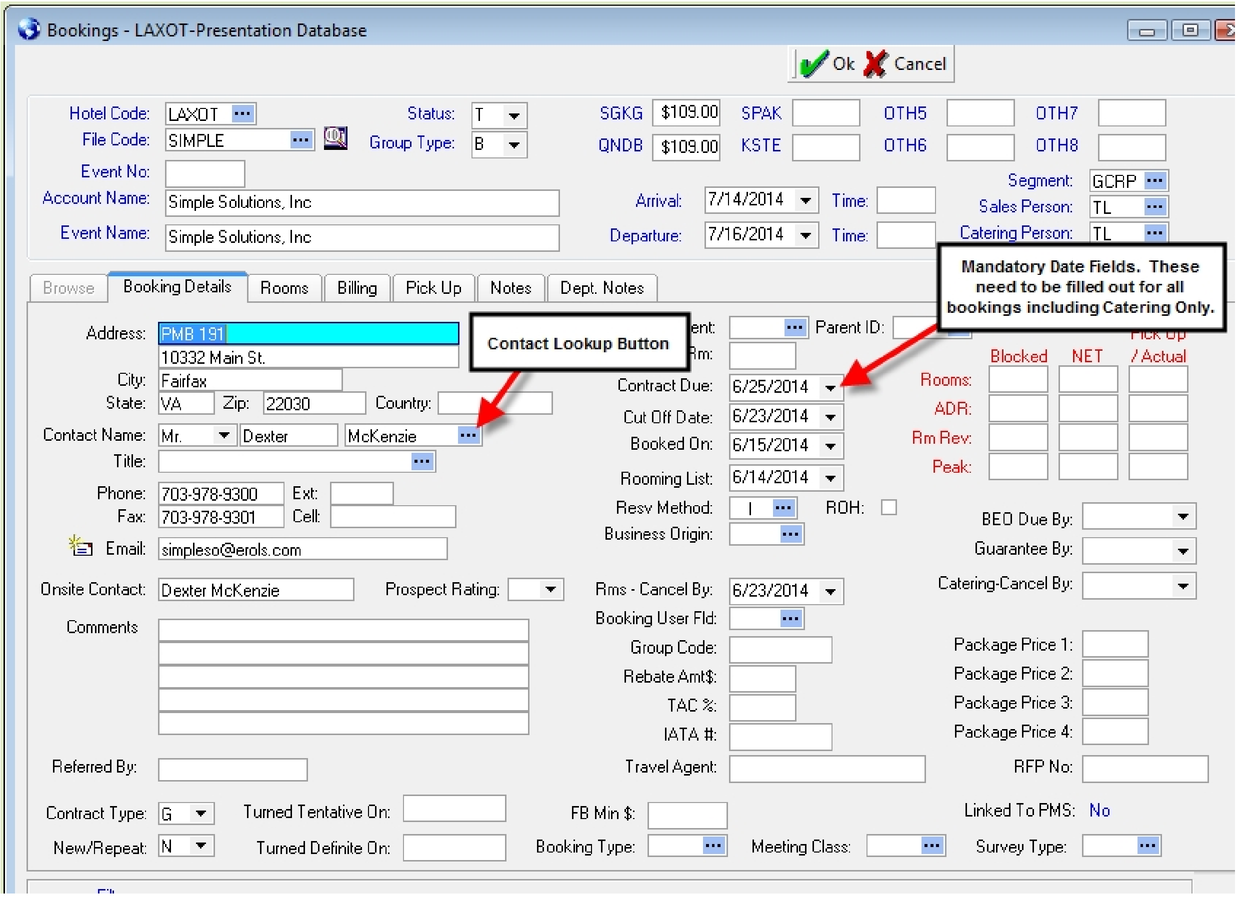
- Verify the **Market Segment** and change if necessary.
- The **Sales Person** and **Catering Person** initials are retrieved from the account. You can change those if necessary.
-

Bookings - Booking Details Tab

Bookings…Booking Details Tab
Use for room only groups, catering only groups and combined bookings of rooms and catering

You can return to the Booking Details tab and verify/enter needed information.

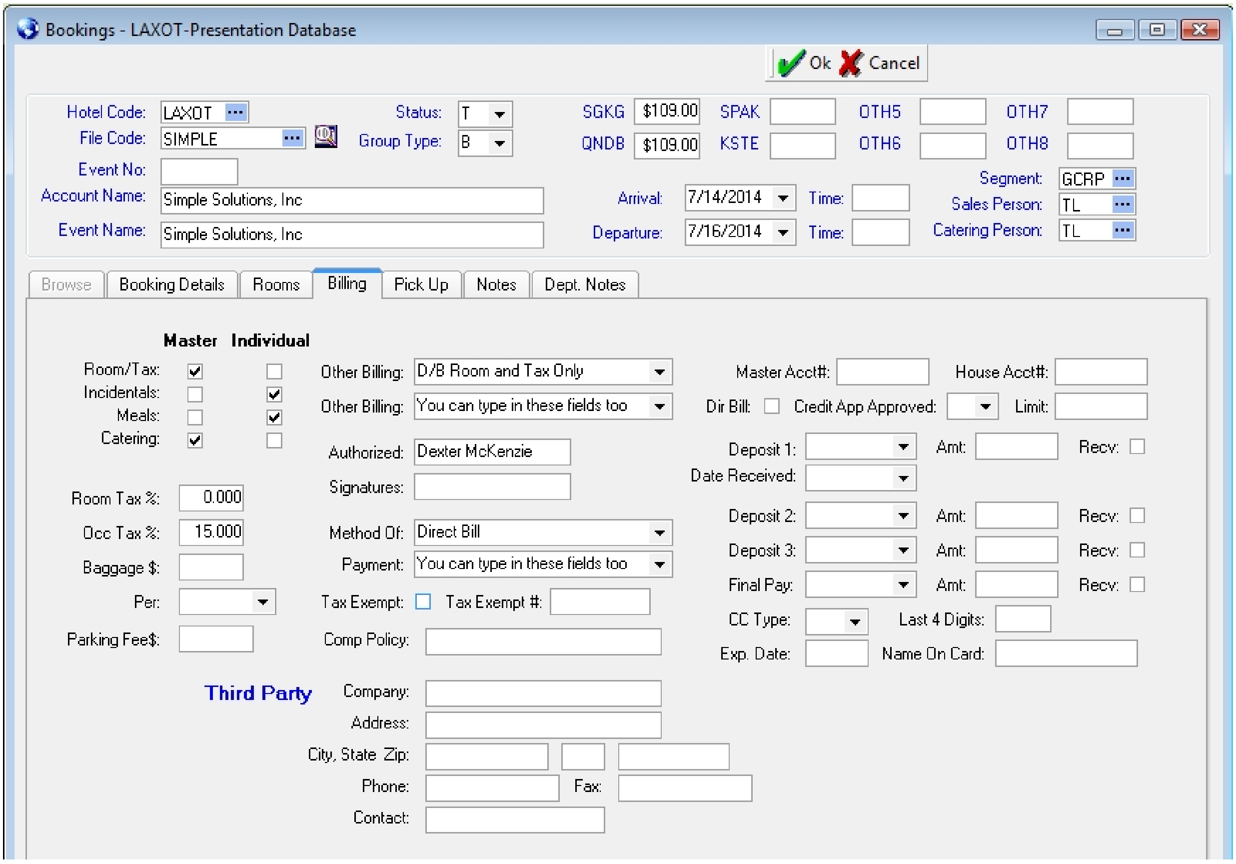
- Contact information. If the booking is for an existing account, with contacts, you can click the lookup button to the right of the Last Name field and choose the Contact. If the account is a generic file, type the contact information in including contact name, address and phone/email address.
- Verify the **Contract Due**, **Cut Off Date** and **Booked On** dates are accurate. These should be filled in for you once you choose the Arrival/Departure dates. You can change them if necessary.
- Most of the other fields on this tab are optional. Fields such as Onsite Contact and Comments can be very helpful but are not mandatory. Resv Method can be helpful too if the group has sleeping rooms.


Bookings - LAXOT-Presentation Database
Ok
Cancel
Hotel Code:
LAXOT
File Code:
SIMPLE
Event No:
Account Name:
Simple Solutions, Inc
Event Name:
Simple Solutions, Inc
Status:
T
Group Type:
B
SGKG
$109.00
QNDB
$109.00
SPAK
KSTE
OTH5
OTH6
OTH7
OTH8
Arrival:
7/14/2014
Departure:
7/16/2014
Time:
Segment:
GCRP
Sales Person:
TL
Catering Person:
TL
Mandatory Date Fields. These need to be filled out for all bookings including Catering Only.
Browse
Booking Details
Rooms
Billing
Pick Up
Notes
Dept. Notes
Address:
PMB 191
10332 Main St.
City:
Fairfax
State:
VA
Zip:
22030
Country:
Contact Lookup Button
Contact Name:
Mr.
Dexter
McKenzie
Title:
Phone:
703-978-9300
Ext:
Fax:
703-978-9301
Cell:
Email:
simpleso@erols.com
Onsite Contact:
Dexter McKenzie
Prospect Rating:
Comments
Referred By:
Contract Type:
G
New/Repeat:
N
Turned Tentative On:
Turned Definite On:
Parent ID:
Contract Due:
6/25/2014
Cut Off Date:
6/23/2014
Booked On:
6/15/2014
Rooming List:
6/14/2014
Resv Method:
I
ROH:
Business Origin:
Rms - Cancel By:
6/23/2014
Booking User Fld:
Group Code:
Rebate Amt$:
TAC %:
IATA #:
Travel Agent:
FB Min $:
Booking Type:
Meeting Class:
Blocked
NET
/ Actual
Rooms:
ADR:
Rm Rev:
Peak:
BEO Due By:
Guarantee By:
Catering-Cancel By:
Package Price 1:
Package Price 2:
Package Price 3:
Package Price 4:
RFP No:
Linked To PMS:
No
Survey Type:

Bookings - Billing Tab

Bookings…Billing Tab
(Use for room only, and catering only or combined business)

The Billing Tab captures billing information related to the booking. The information on this tab is **optional** but can be important. Below find some of the key fields described on the billing tab. The other fields can prove helpful in certain situations. All of the fields on the Bill Tab are potential merge fields that can be included in merge documents such as contracts.

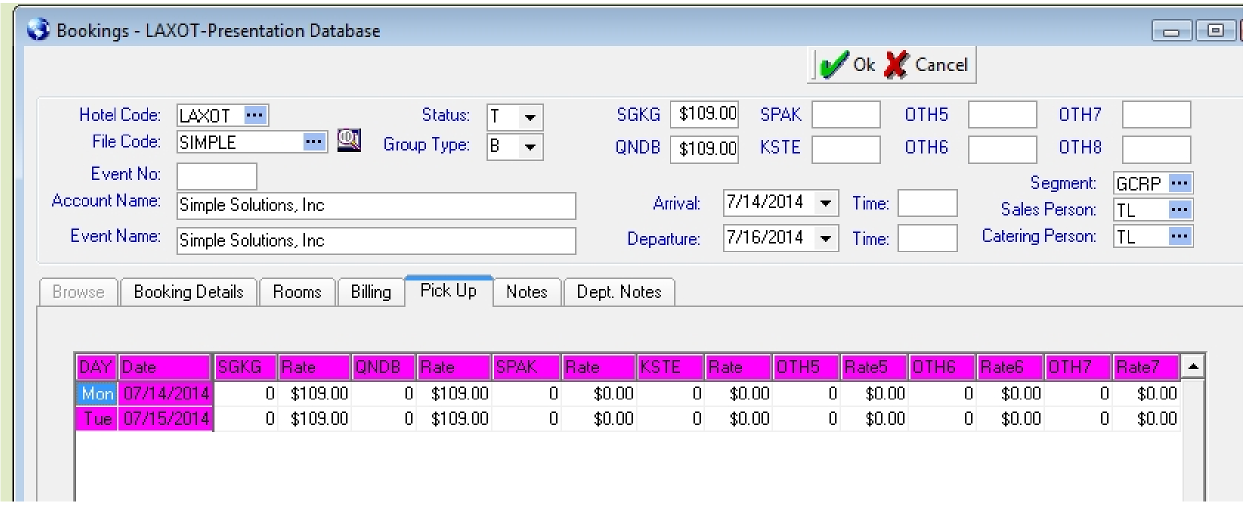


- **Master Individual** checkboxes. You can check the appropriate boxes noting how the client will pay for Room/Tax, Incidentals, restaurant Meals and Catering.
- Room Tax %, Occ Tax % and Baggage/Parking charge fields are not used for calculations but are available merge fields for including in contracts that can merge into Word.
- **Other Billing** – You can choose a preloaded response from the drop down or type in other billing comments.
- **Authorized Signatures** – There are two fields for capturing who can sign the bill if the group is direct billing charges.
- **Method of Payment** – You can choose the method of payment from the drop down list or type in the method of payment.
- **Deposit Information** – You have fields to capture 3 deposit, and final payment, dates and amounts. If the group had advanced deposit requirements it is recommended you enter the deposit information here.

Bookings - Pick Up Tab

Bookings...Pick Up Tab

The Pick Up tab is where you can enter the “actual” rooms the group consumes. The pickup information is typically entered after the group checks out. You can ignore this tab if the group is Catering Only group.

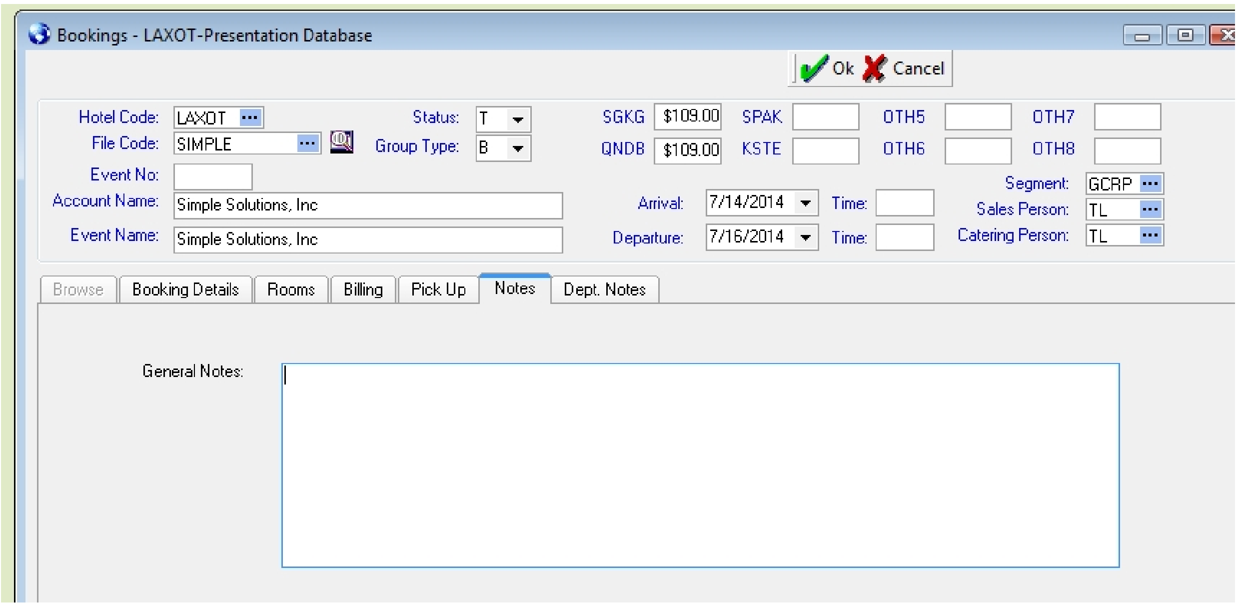


If your hotel uses Skytouch PMS, OnQ, or Choice Advantage, an interface is available to bring in the actual reservations from these Property Management Systems as part of your night audit process. If this has not been set up, contact support at STS for more information.

Bookings - Notes Tab

Bookings...Notes Tab

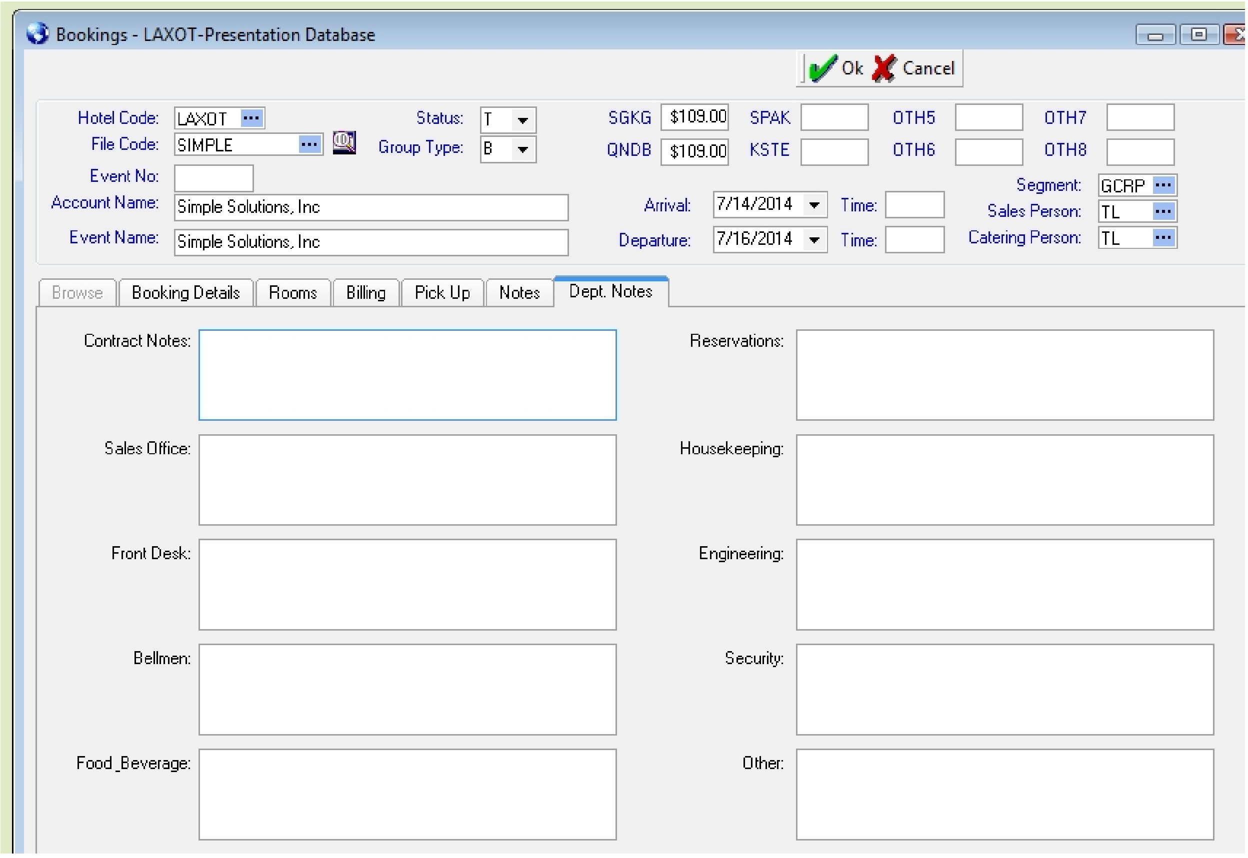
The Notes tab is optional and allows you capture general information about the group. This information will print on the group resume.



Bookings - Dept Notes Tab

Bookings…Dept. Notes Tab

The Dept. Notes tab is optional and allows you enter useful information about the group by department. This information will print on the group resume.

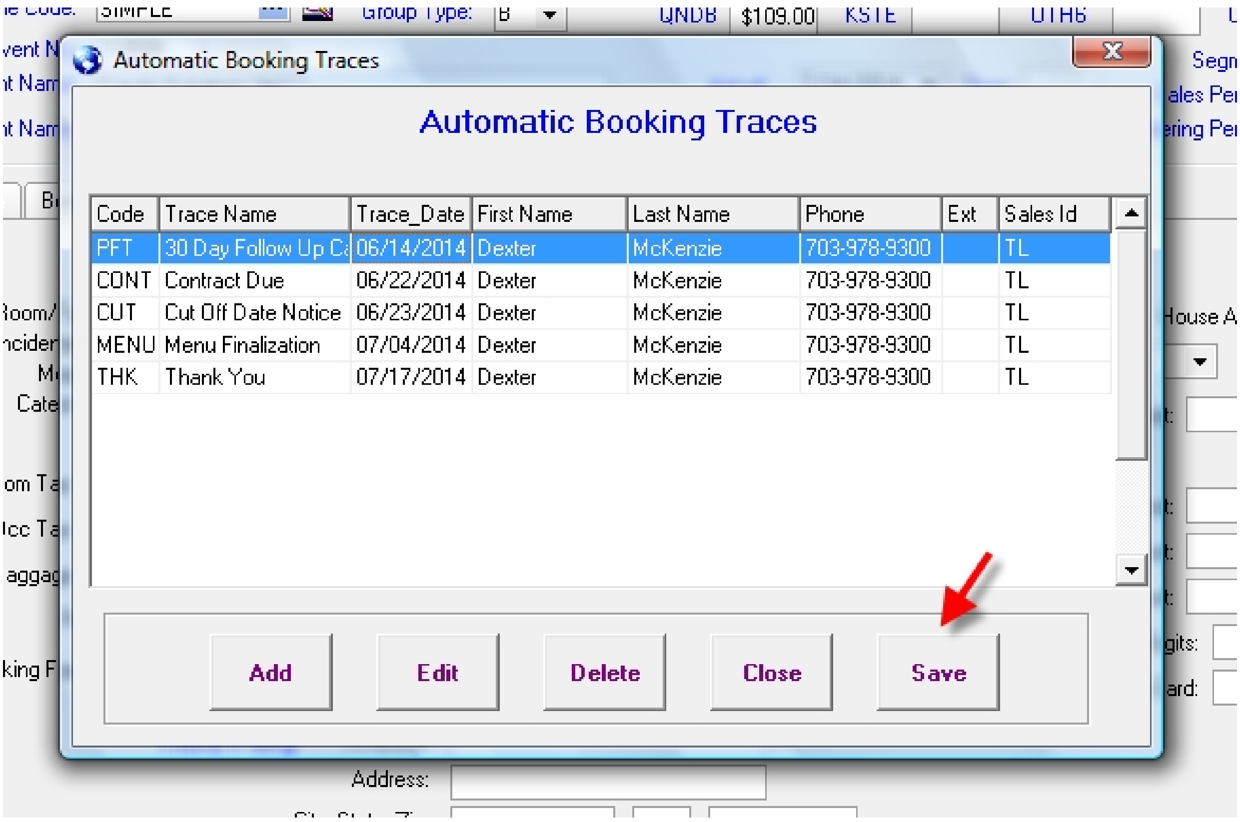


Bookings - Automatic Traces

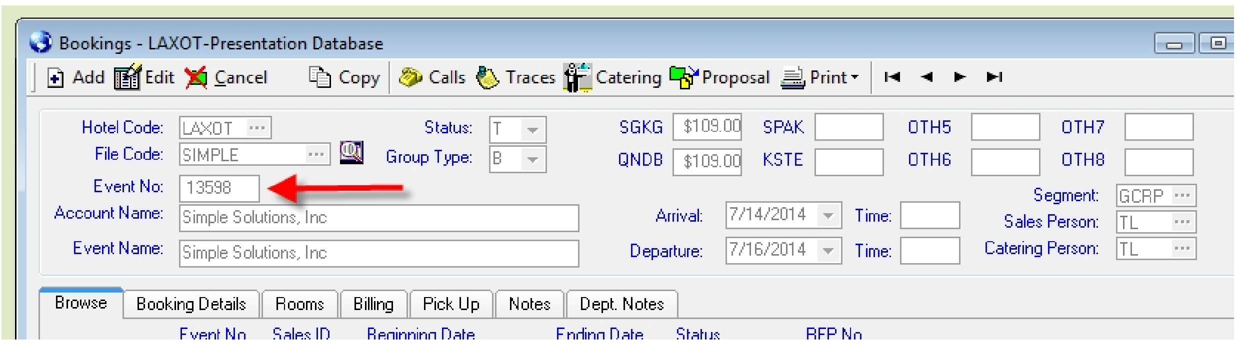
Bookings…Automatic Traces

Once you have entered the needed information for the booking, click the OK button to Save. The Automatic Trace screen will open displaying the automatic traces that have been setup to be created for each new booking entered. The Automatic Trace formulas can be modified under **Utilities | T able Maintenance | Automatic Booking Traces**.

You can Add, Edit or Delete traces before clicking Save



Once you save the auto traces, STS will save the booking and generate an Event Number.

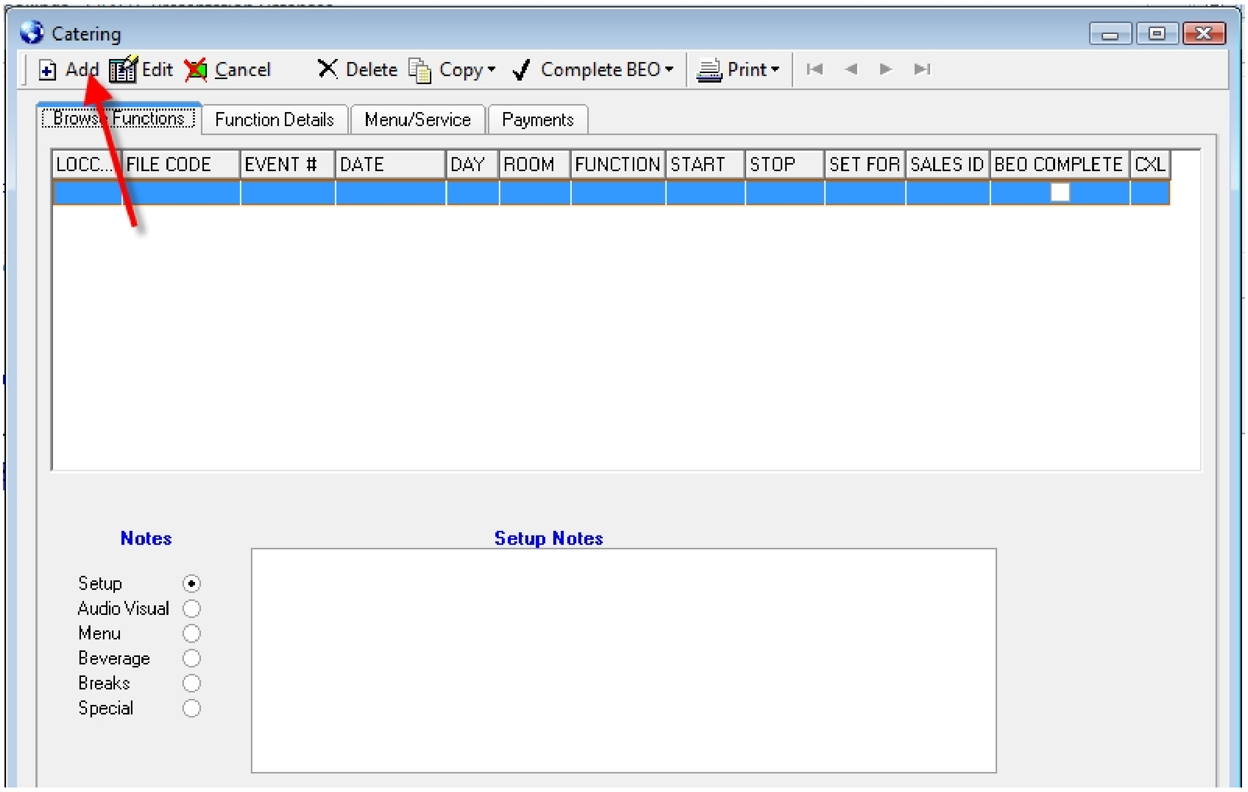


For catering only events, this screen will populate once you have completed the Booking Details and Billing tabs. Once this step is processed, you will then follow the Catering steps to secure your function space and begin to add menu items, payments, etc.

Bookings - Catering

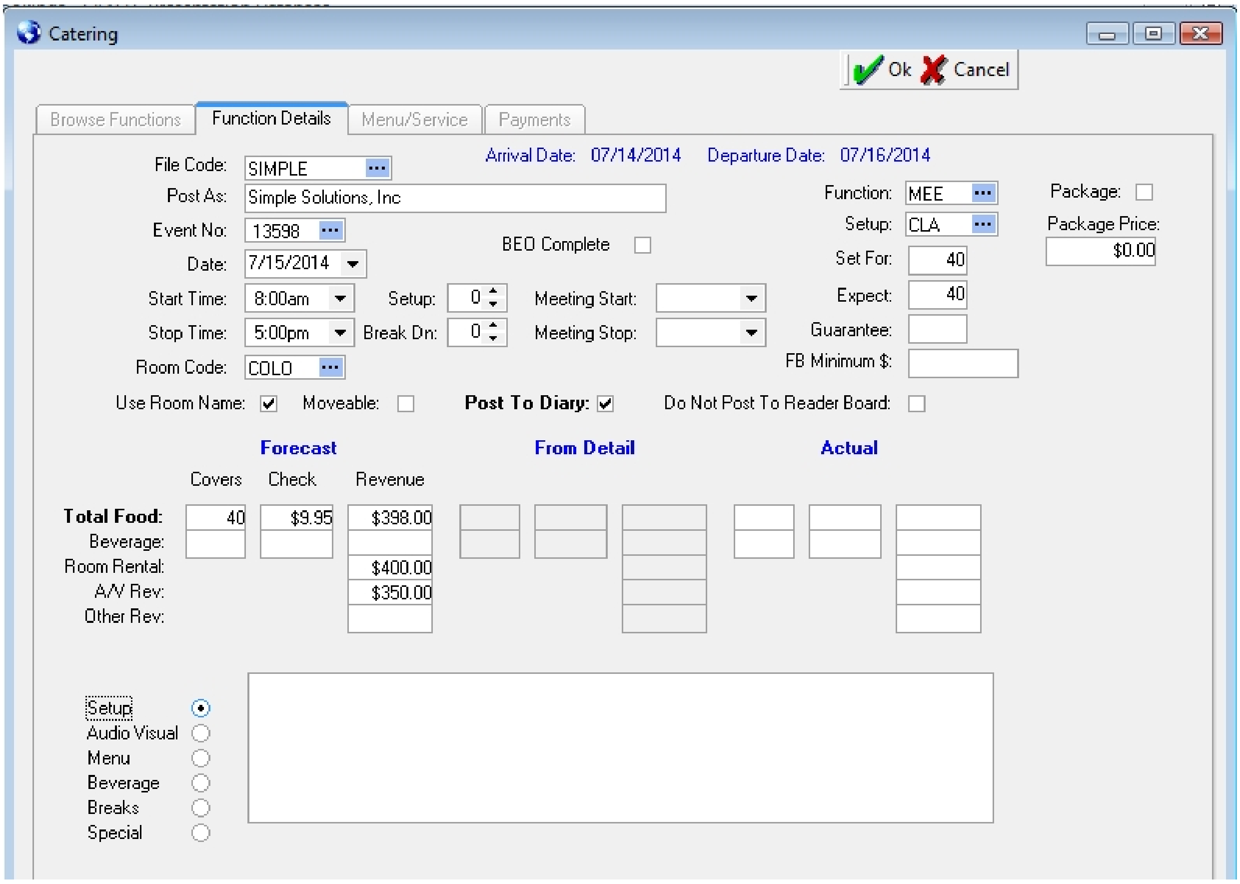
Bookings…Catering

The Catering screen is where you attach catering functions to a booking. After saving the Booking, and the Event No is generated, you can click the Catering button on the toolbar to open the Catering screen. From this screen you may Add, Edit or Delete functions. Once you add a function you can add the Menu/Service items you will be charging the client for by utilizing the Menu/Service tab. Finally, if you have a group that will have similar functions for several days you should enter the function for the first day. Then add any menu/service items. Once this is complete you can use the Copy button to copy the function, and the related menu/service items, to a second day. This will save you significant time by not having to enter the menu/service items for each day.



Bookings…Catering

To add a catering function, click the Add button. The File Code, Post As and Event No is filled in for you. Do not change the File Code or Event No fields. You can change the Post As if the function name is different than the Event Name.



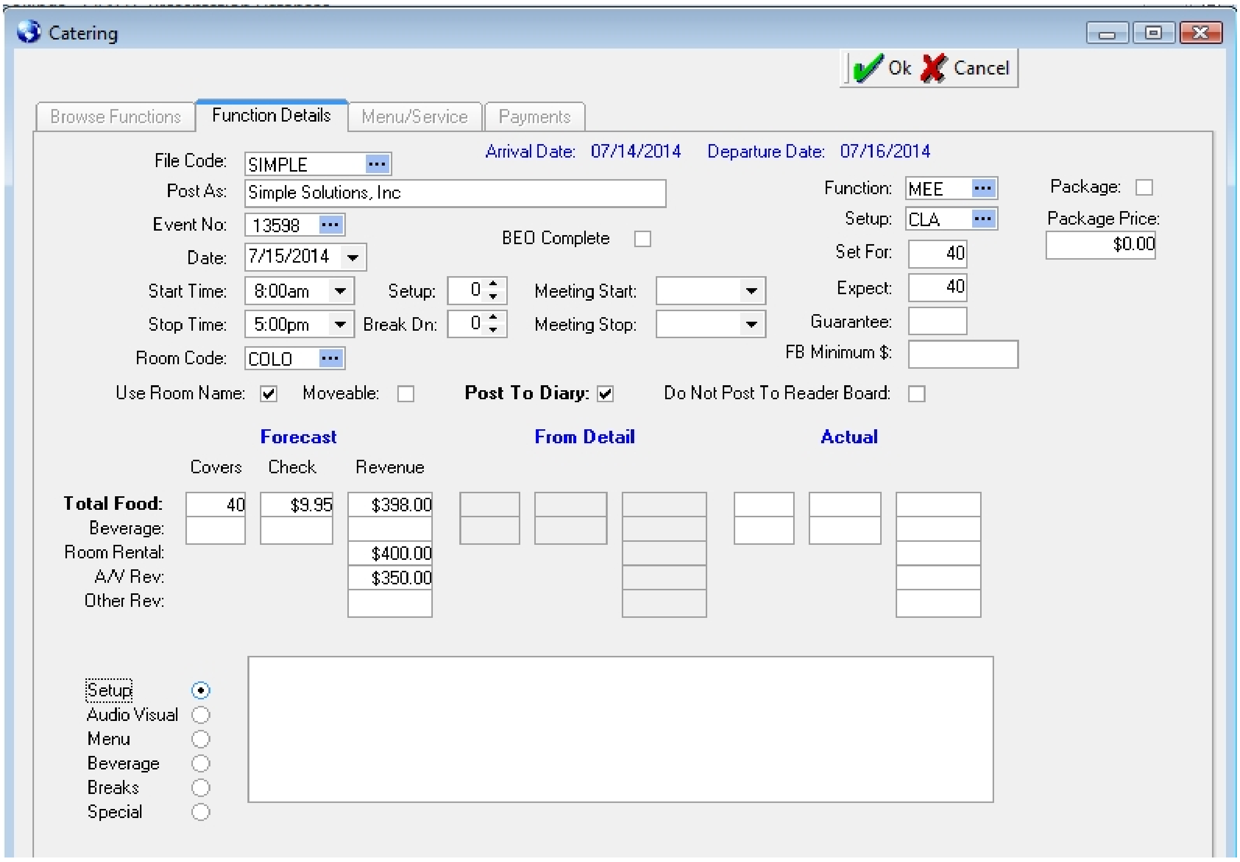
The following are the mandatory fields you have to enter before being able to save the function.

- **Date** – Function Date
- **Start Time** – Use the drop down to choose the start time in ½ hour increments. If the function needs to start at time different than ½ hour increments, you can enter that time in the Meeting Start field (see below) as you can enter any time in that field.
- **End Time** – Use the drop down to choose the end time in ½ hour increments.
- **Room Code**
- **Function Code**
- **Setup**
- **Set For** – How many guests to set the room for

Although not mandatory, you should enter estimates for covers/revenue in the Forecast section. All future catering report use the revenue from the Forecast section.

Bookings…Catering

Below are descriptions of the other fields on the Catering Details tab.

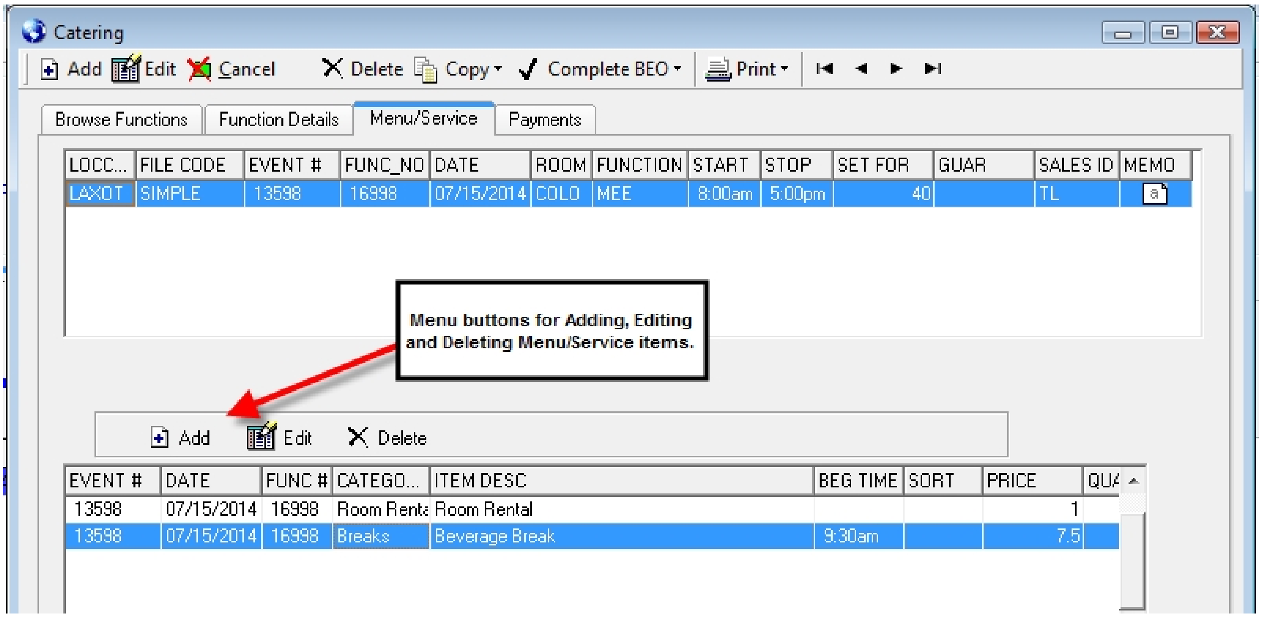


- **Setup** – amount of time you would like to block prior to the start time of the function for setup
- **Break Dn** – amount of time you would like to block after the end of the function for break down
- **Meeting Start** – This field will default to the same as the Start Time. You can enter any Meeting Start time in this field if it's different than the Start Time.
- **Meeting Stop** – This field will default to the same as the Stop Time
- **Use Room Name** – This field, if checked, will include the name of the meeting room in the contract.
- **Post To Diary** – This field, if checked, will actually block the space in the function diary. Most functions should have this field checked.
- **Do Not Post To Reader Board** – If you check this box STS will not merge this meeting to the Reader Board merge. It will also not export this function to the electronic signage system if you use one.
- **From Detail Section** – This section will fill in automatically when you add menu/service items. You can't type in these fields.
- **Actual Section** – This section contains the actual revenue for the function. The revenue from the "From Detail" section will be transferred to the "Actual" section when you mark the BEO Complete.
- Setup, Audio Visual, Menu, Beverage, Breaks and Special notes sections at the bottom of the screen.

Catering - Menu Service

Bookings…Catering – Menu/Service

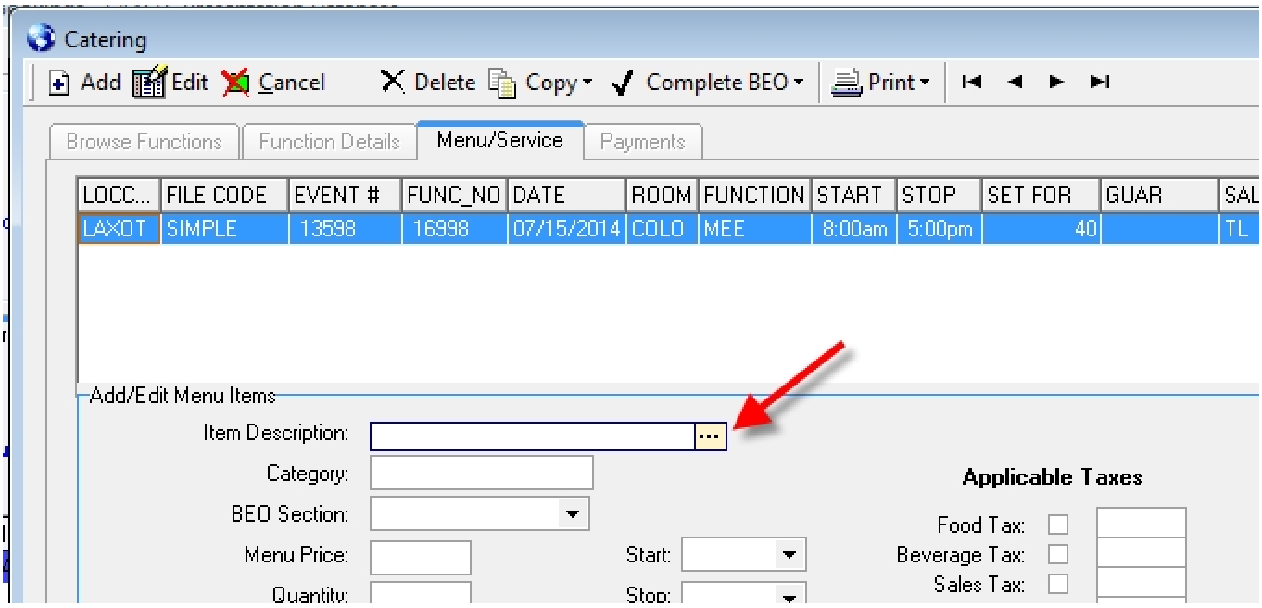
The Menu/Service tab is where you add items that will merge onto the BEO and print on the banquet check. The Menu/Service tab is a split screen. The Menu items you add to the lower half

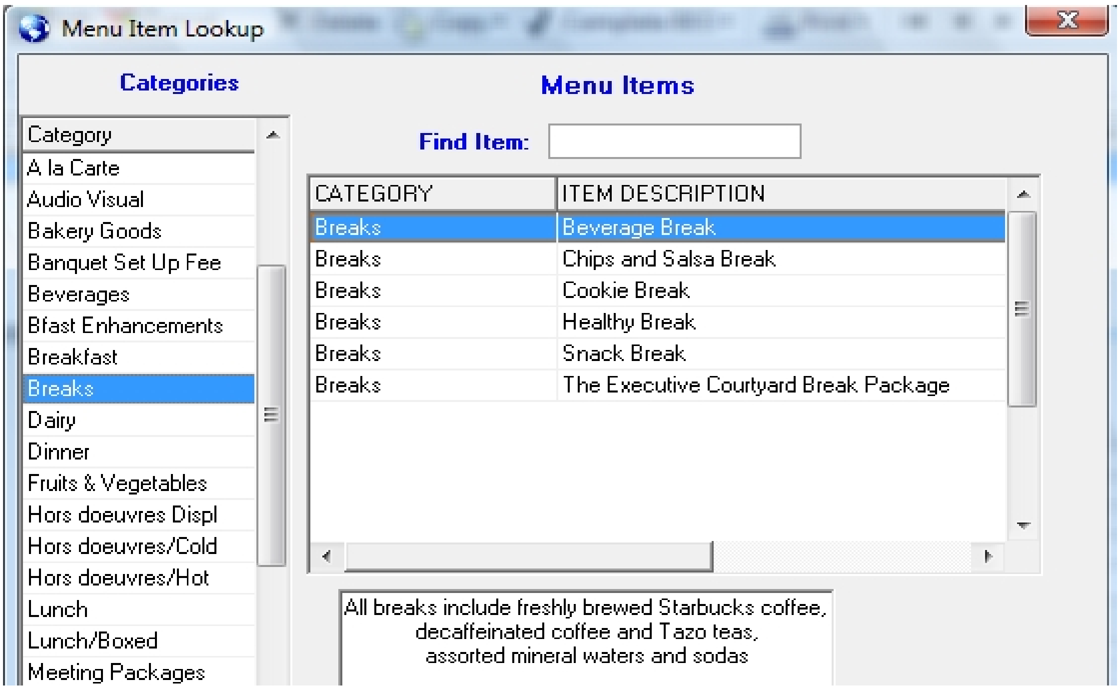


Bookings…Catering – Menu/Service

Click the **Add** button on the Menu/Service toolbar to add a new item. Click the lookup button at the right of the Item Description field to pop up a list of the menu items. It is recommended you choose the item from the lookup list versus typing in the information in each field.

Choose the Category on the left. All menu items belonging to that category will be displayed in list on the right. After locating the desired item, double click on the item to choose it.



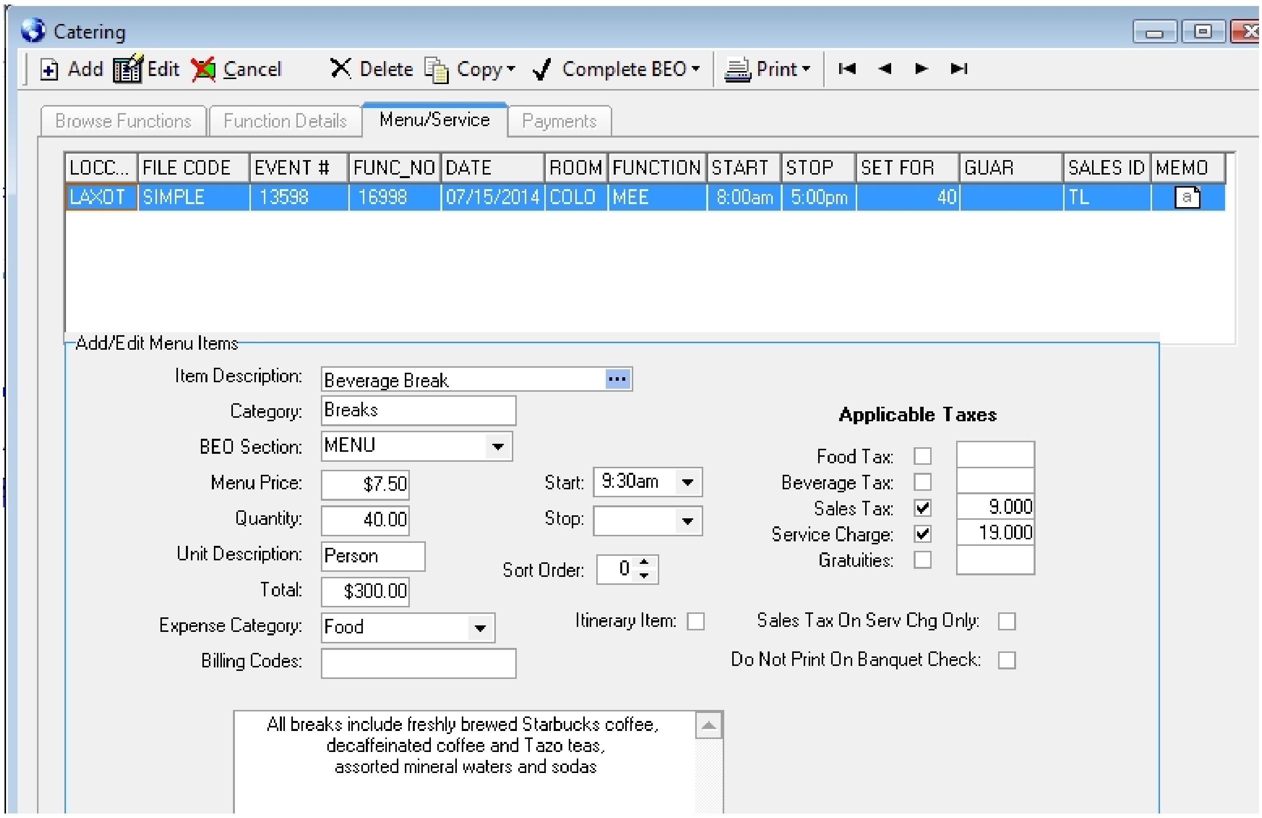


Bookings…Catering – Menu/Service

Once you choose an item, press the Tab key to move to the next field. Many of the fields will be filled in automatically. You can change any of the information in the fields as needed.

If the item needs to be in the room at a certain time you can choose the time from the drop down or leave it blank.

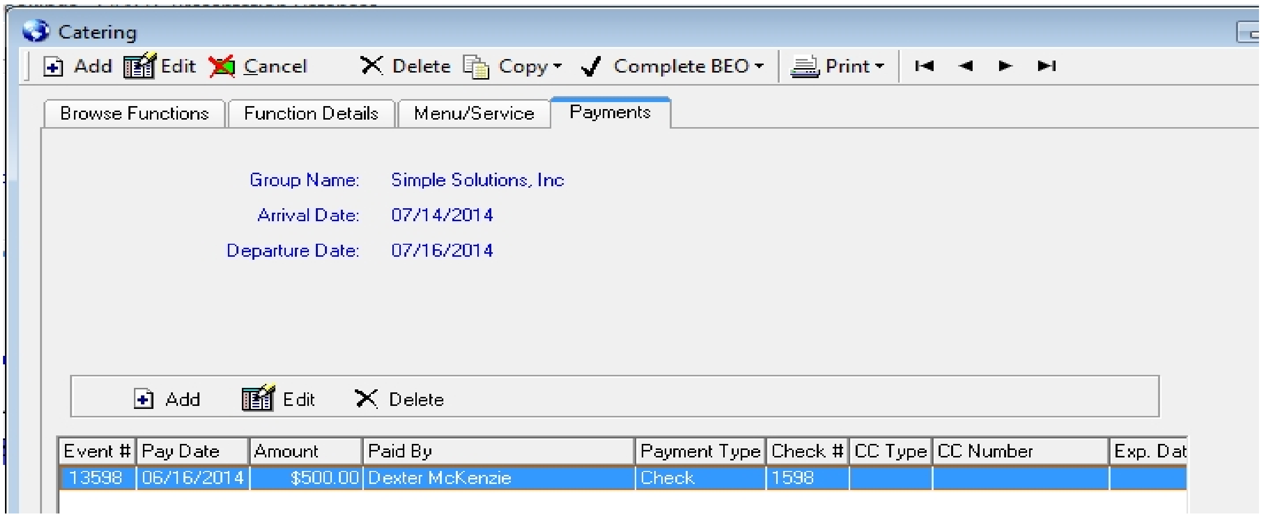
Repeat the process adding any needed menu/service items.

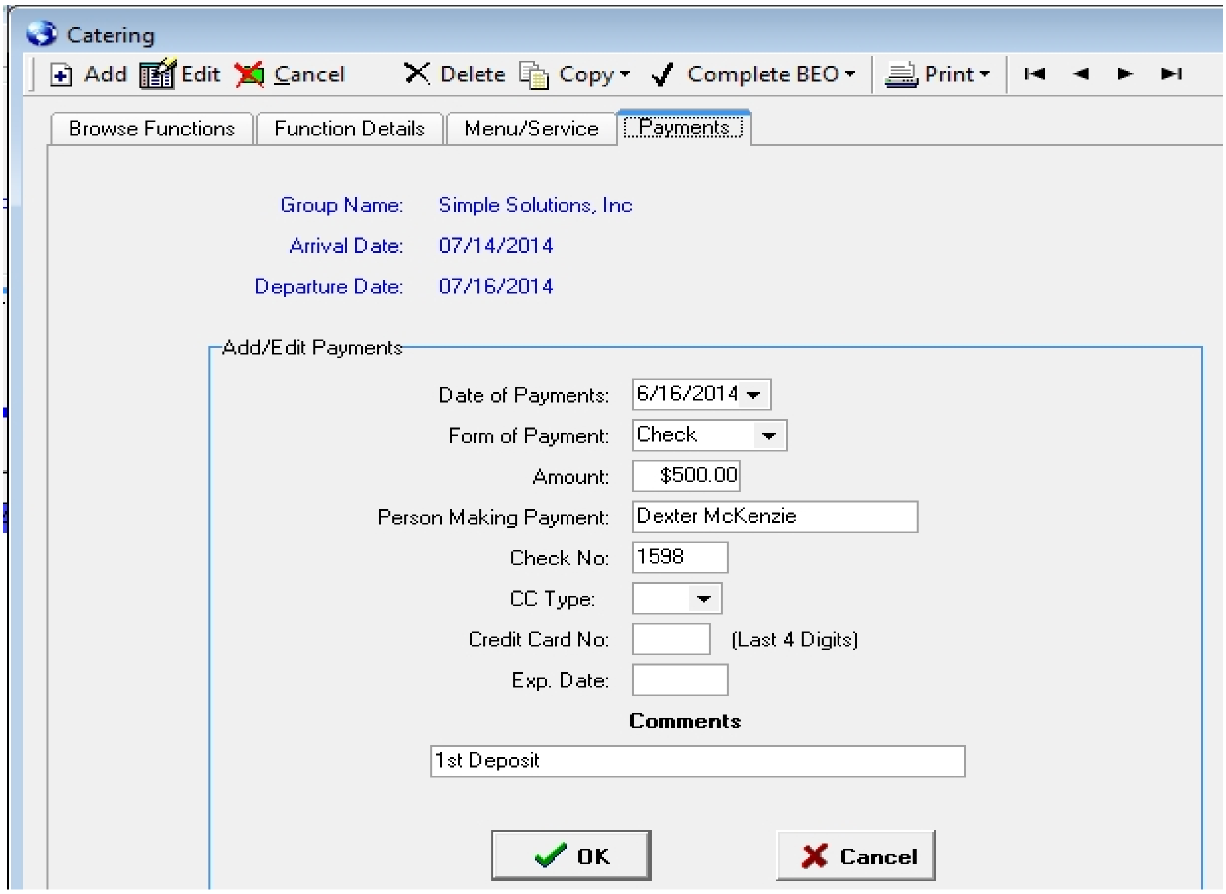


Catering - Payment

Bookings…Catering – Payments

The Payments tab allows you to enter advanced payment information if applicable. If you require an advance deposit from the client, you can document the payments on the Payments tab. These payments will be printed on the banquet check.

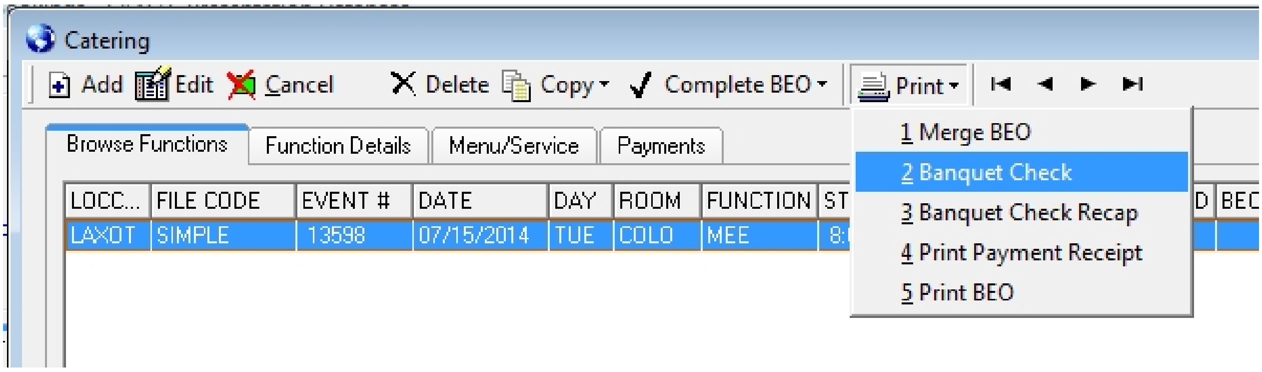


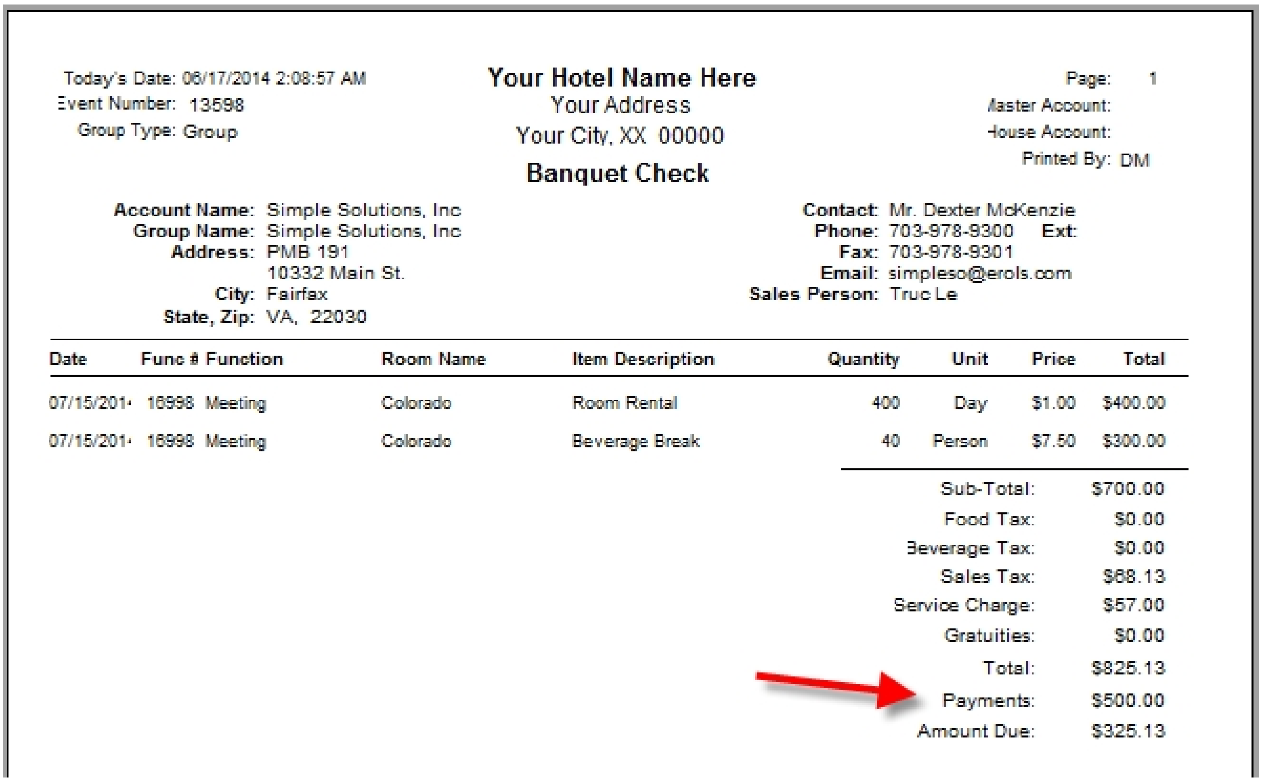


Catering - Banquet Check

Bookings…Catering – Payments

The system will generate a banquet check, using the detail from menus selected and related payments and deposits recorded in STS.




Today's Date: 06/17/2014 2:08:57 AM
Event Number: 13598
Group Type: Group

Your Hotel Name Here
Your Address
Your City, XX 00000

Banquet Check

Page: 1
Master Account:
House Account:
Printed By: DM

Account Name: Simple Solutions, Inc
Group Name: Simple Solutions, Inc
Address: PMB 191
10332 Main St.
City: Fairfax
State, Zip: VA, 22030

Contact: Mr. Dexter McKenzie
Phone: 703-978-9300 **Ext:**
Fax: 703-978-9301
Email: simpleso@erols.com
Sales Person: Truc Le

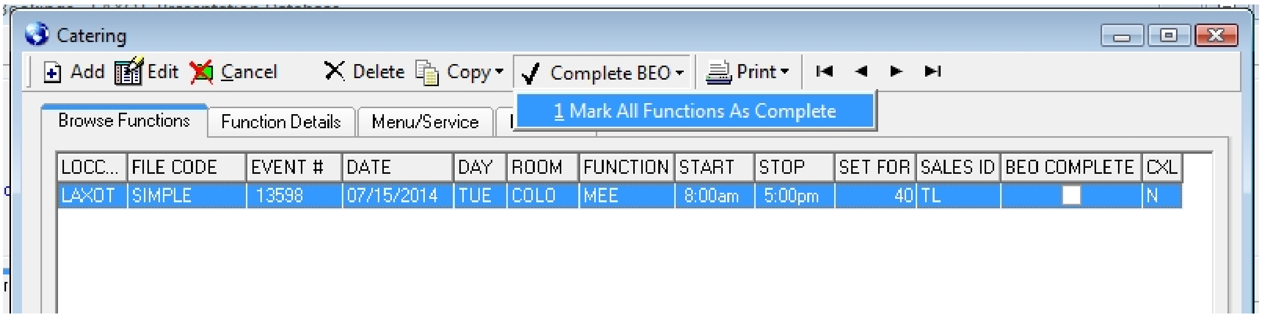
Date	Func #	Function	Room Name	Item Description	Quantity	Unit	Price	Total
07/15/201	16998	Meeting	Colorado	Room Rental	400	Day	$1.00	$400.00
07/15/201	16998	Meeting	Colorado	Beverage Break	40	Person	$7.50	$300.00

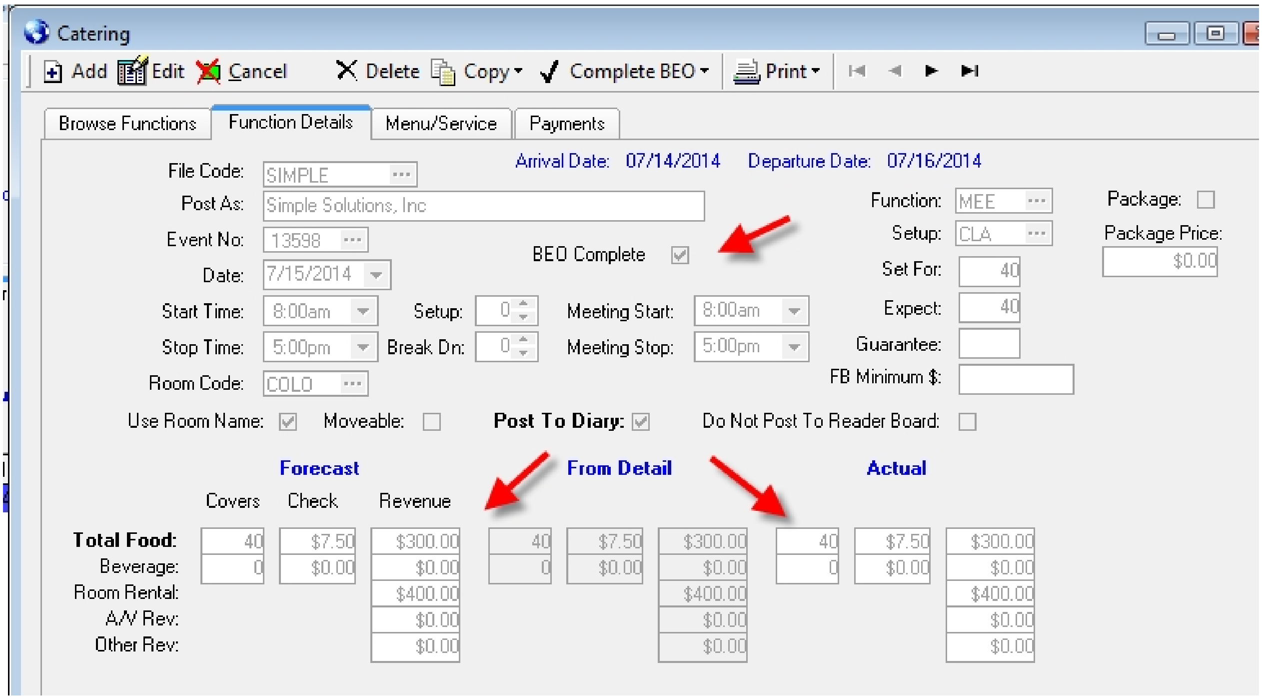
Sub-Total:	$700.00
Food Tax:	$0.00
Beverage Tax:	$0.00
Sales Tax:	$68.13
Service Charge:	$57.00
Gratuities:	$0.00
Total:	$825.13
Payments:	$500.00
Amount Due:	$325.13

Catering - Complete BEO

Bookings…Catering – Complete BEO

Once you have received all of the details from the client you can mark the functions as “complete” by clicking the **Complete BEO** drop down from the toolbar. Completing the BEO will copy the revenue from the “From Detail” section to the “Forecast” and “Actual” sections. The revenue will stay synchronized changing the Forecast and Actual sections if changes are made to the Menu/Service items.

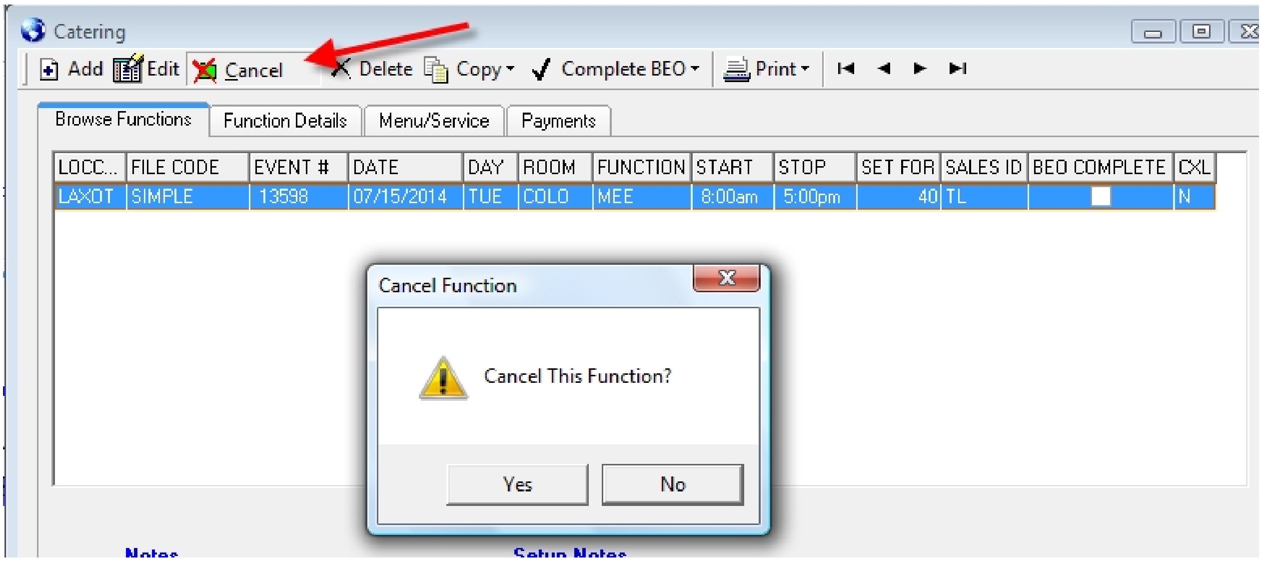


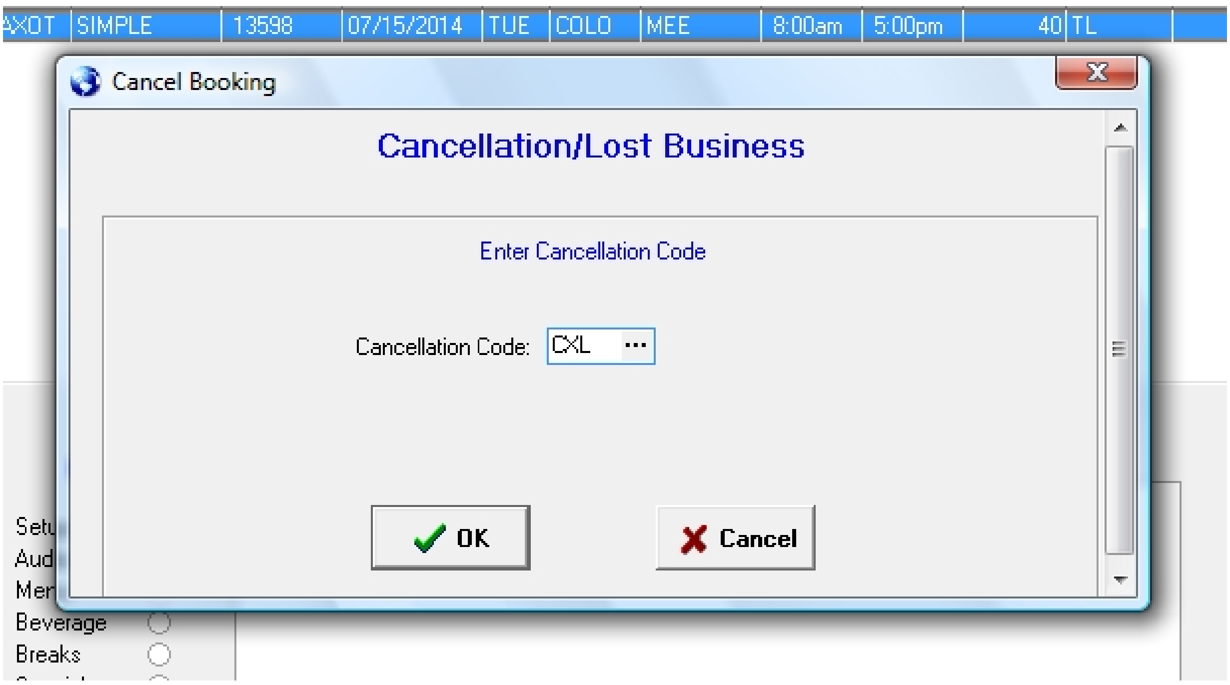


Cancelling

Bookings…Catering – Cancel

The **Cancel** button allows you to cancel a function. After clicking the Cancel button you will be presented with a window allowing you to choose the reason for canceling the function. Once canceled, the function will be displayed in red.

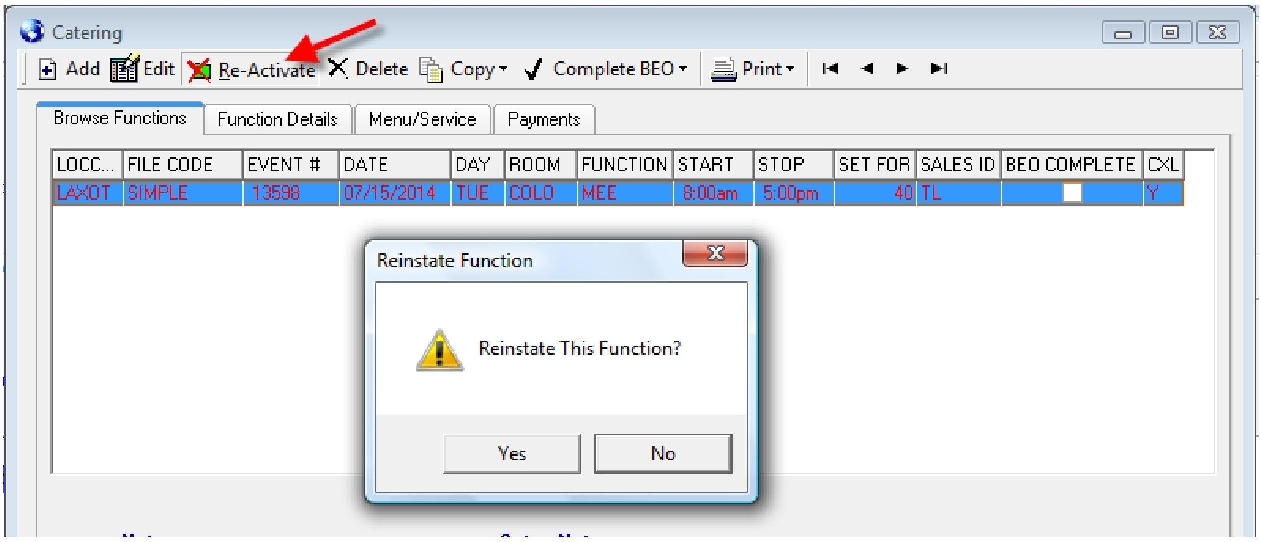




Reinstate a Cancelled Event

Bookings…Catering – Reinstate

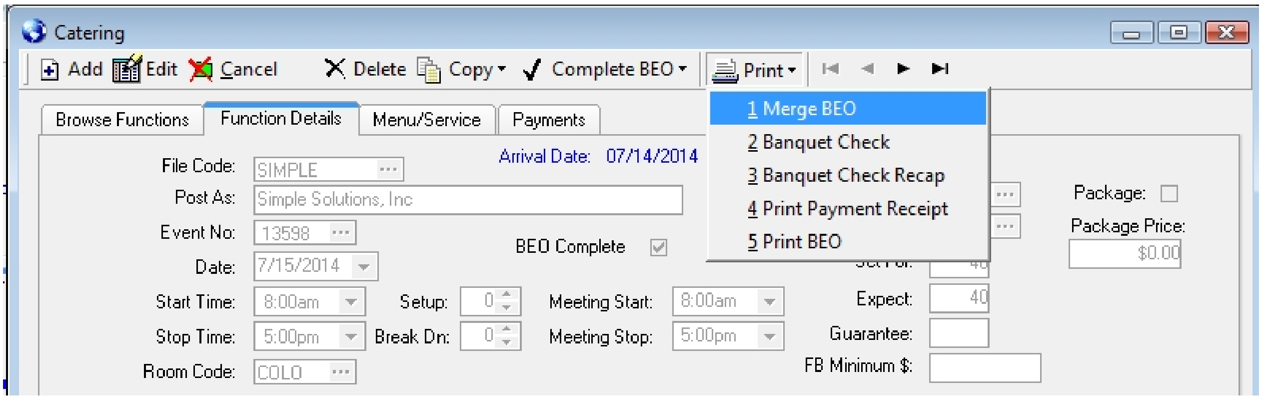
You can reinstate a function by highlighting a canceled function and clicking the **Re-Activate** button. The function will be reinstated.

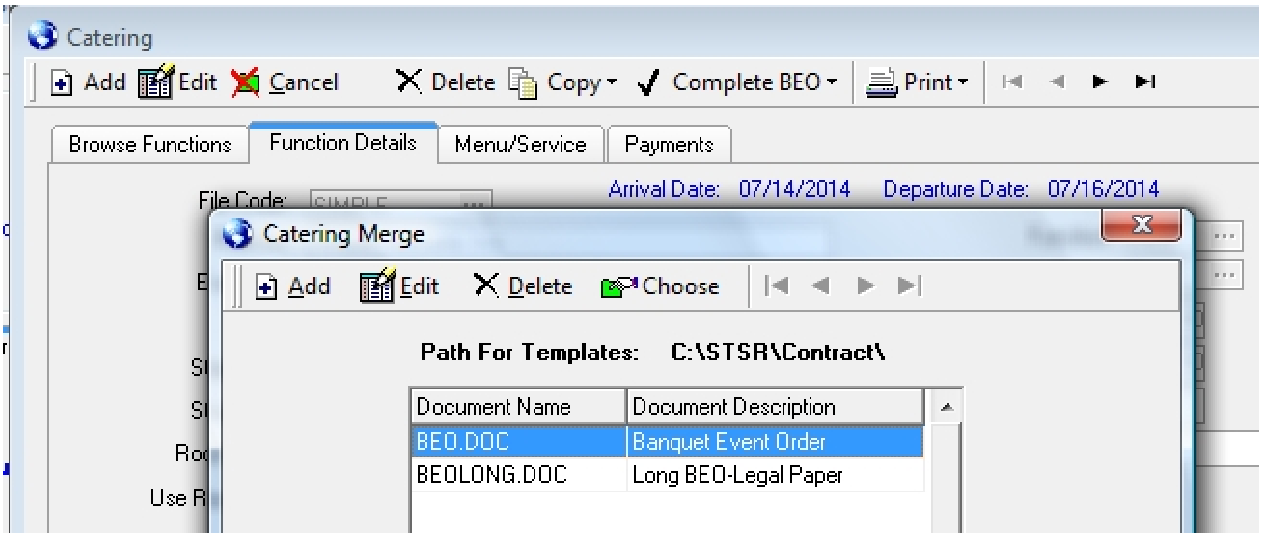


Catering - Merge BEO

Bookings…Catering – Merge BEO

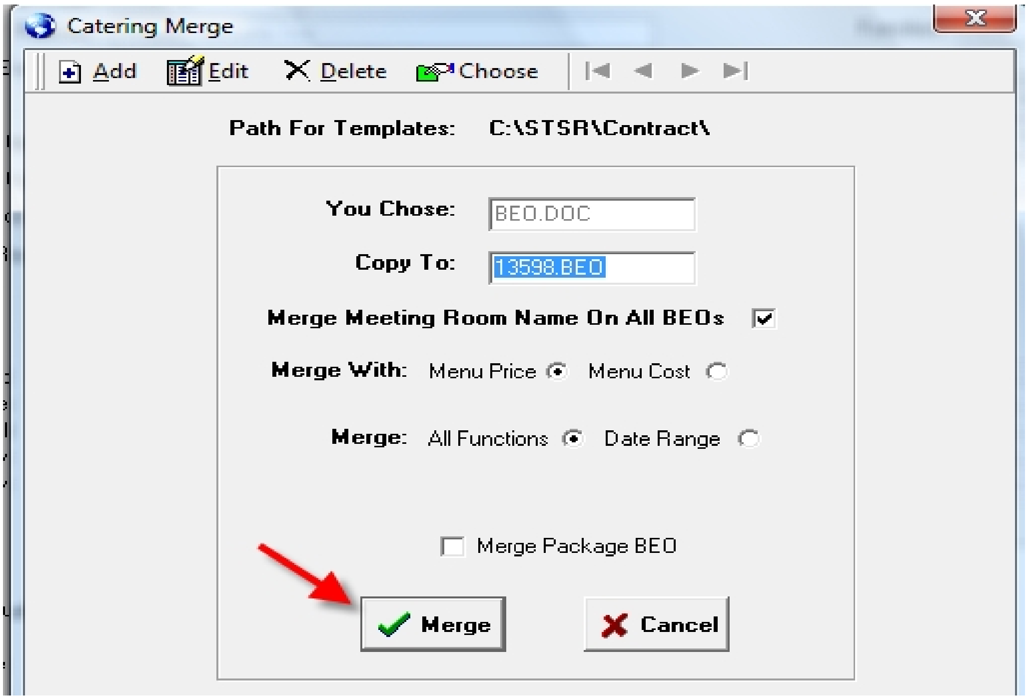
You can merge the function information into a BEO by clicking **Print | Merge BEO**. You will be presented with a list of Word templates. You can either double click, or click the Choose button to choose the template. You can also “Print” the BEO using the Print BEO option. The Print BEO option will print the BEO information into a report format. You will not be able to modify the printed BEO. Only the Merged BEO.

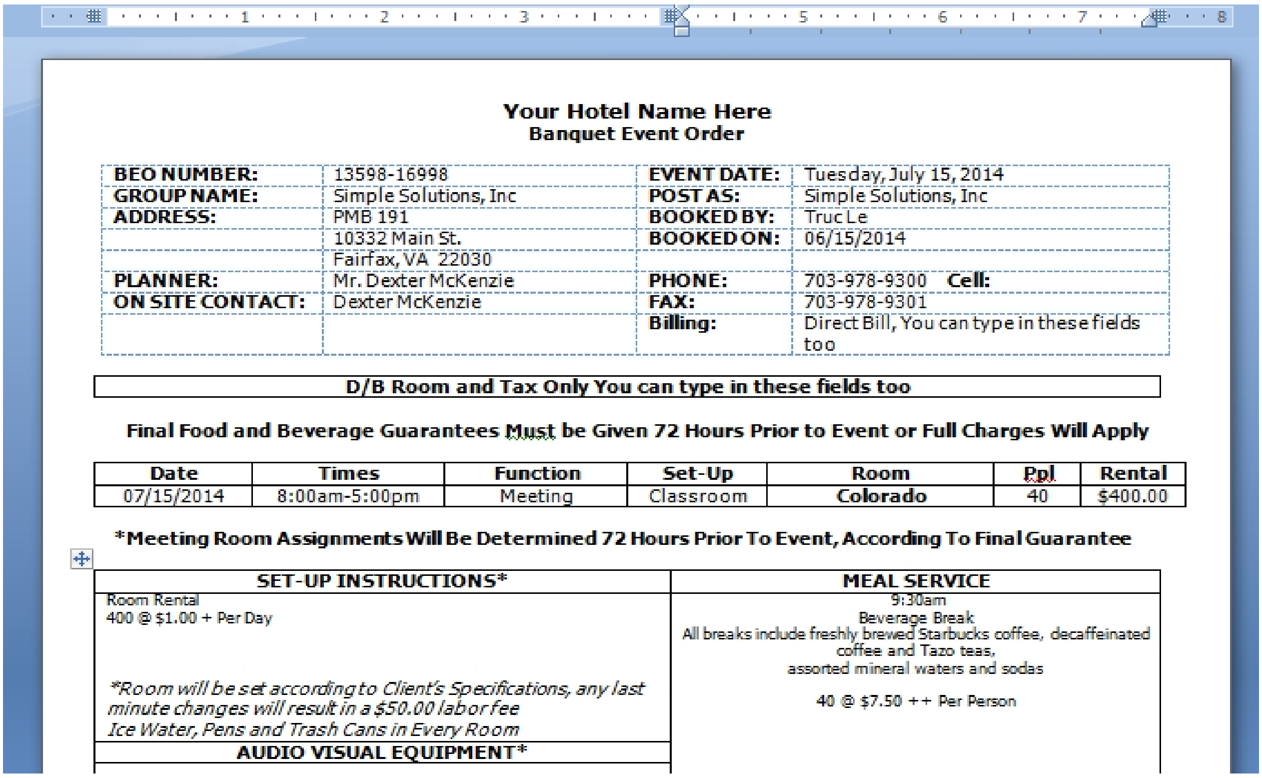




Bookings…Catering – Merge BEO

Once you click the Merge button STS will open Word and merge the function information into the BEO template. You will get one page per function. You can make any additional adjustments to the document before saving it.





Your Hotel Name Here
Banquet Event Order

BEO NUMBER:	13598-16998	**EVENT DATE:**	Tuesday, July 15, 2014
GROUP NAME:	Simple Solutions, Inc	**POST AS:**	Simple Solutions, Inc
ADDRESS:	PMB 191	**BOOKED BY:**	Truc Le
	10332 Main St.	**BOOKED ON:**	06/15/2014
	Fairfax, VA 22030		
PLANNER:	Mr. Dexter McKenzie	**PHONE:**	703-978-9300 **Cell:**
ON SITE CONTACT:	Dexter McKenzie	**FAX:**	703-978-9301
		Billing:	Direct Bill, You can type in these fields too

D/B Room and Tax Only You can type in these fields too

Final Food and Beverage Guarantees Must be Given 72 Hours Prior to Event or Full Charges Will Apply

Date	Times	Function	Set-Up	Room	Ppl	Rental
07/15/2014	8:00am-5:00pm	Meeting	Classroom	**Colorado**	40	$400.00

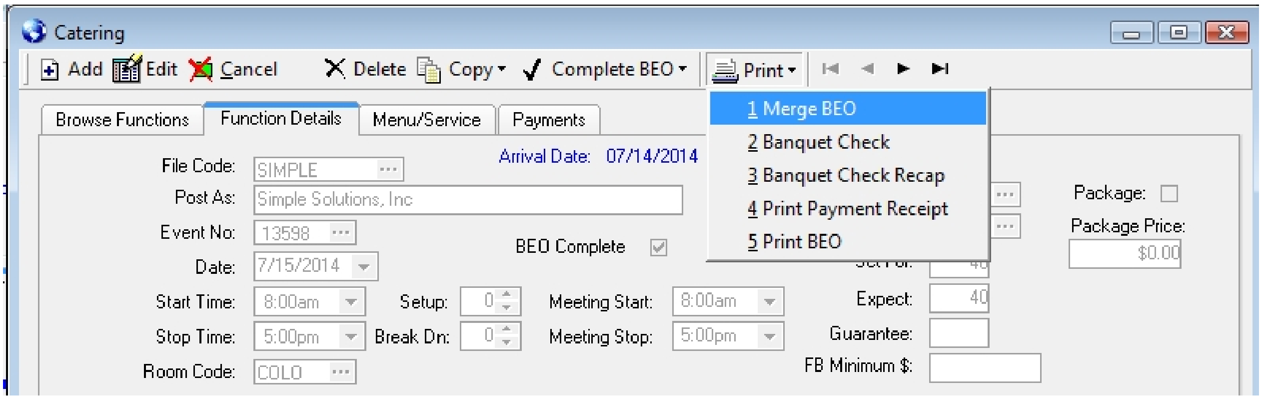
***Meeting Room Assignments Will Be Determined 72 Hours Prior To Event, According To Final Guarantee**

SET-UP INSTRUCTIONS*	MEAL SERVICE
Room Rental 400 @ $1.00 + Per Day **Room will be set according to Client's Specifications, any last minute changes will result in a $50.00 labor fee* *Ice Water, Pens and Trash Cans in Every Room*	9:30am Beverage Break All breaks include freshly brewed Starbucks coffee, decaffeinated coffee and Tazo teas, assorted mineral waters and sodas 40 @ $7.50 ++ Per Person
AUDIO VISUAL EQUIPMENT*	

Catering - Print BEO

Bookings…Catering – Print BEO

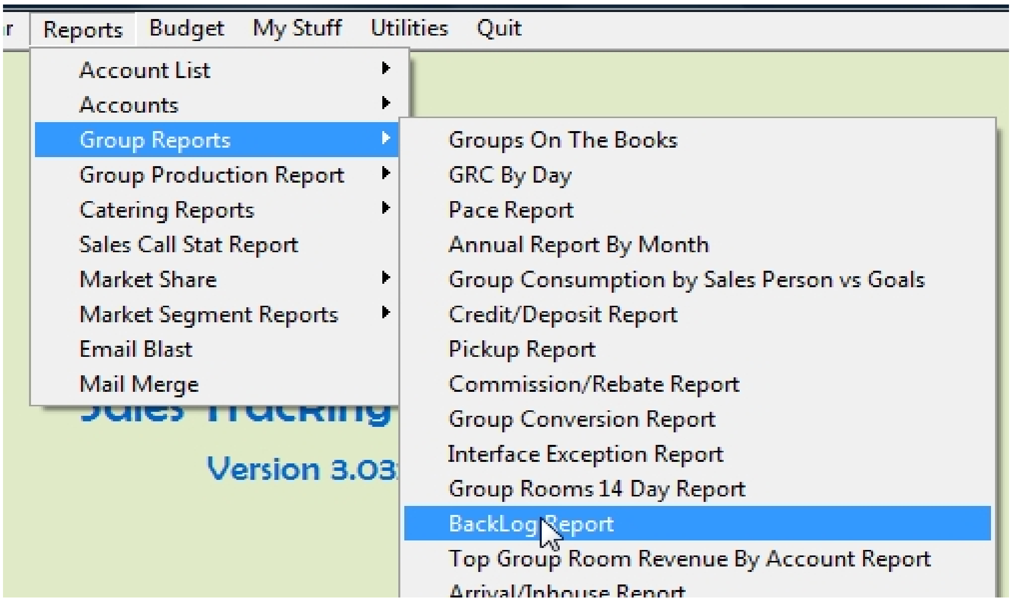
You can merge the function information into a BEO by clicking **Print | Print BEO**. The Print BEO option will print the BEO information into a report format and can be exported as a PDF file. You will not be able to modify the printed BEO, as this is a static version built into the system, and is very customary to a standard hotel layout. Only the Merged BEO can be modifed in Word once it is merged, then saved as a document for later use.

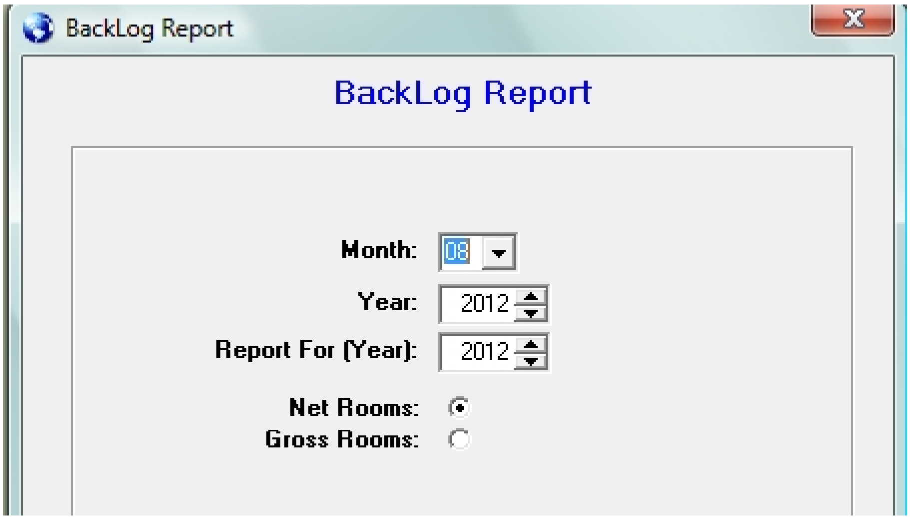


Backlog Report

Backlog Report

The Backlog Report is STS allows you to track several aspects of your group rooms business. See the information below that explains the report and it's various sections. To access the report click Reports | Group Reports | Backlog Report.





Typically you would choose the current month or the month that has just been completed. The top part of the report focuses on the group booking activity for the month chosen and which month in the future the activity drops in.
The Total Rooms by Month report (Reports | Accounts | Total Rooms by Month) prints a summary of tracking entered for each company, by month, for a 3 year period. This report gives you a great way of reviewing year over year activity of the accounts you are tracking. Below see the steps for running this report.

Backlog Report

The top part of the report focuses on the group booking activity for the month chosen and which month in the future the activity drops in. The example below was run for August.

The top of the report begins with the Definite rooms on the books at the beginning of the month. It then prints the booking activity that occurred “during” the month of August. It breaks it down by “New Definites”, “Canceled Definites” and “Re-Evaluations”. It also prints how much of the activity occurs in each of the remaining months for the year. The “End Of Month Definites” should equal what is on the books in the GRC for each month.

The next section prints Actuals for previous months and compares the actuals, and the blocked rooms above, to budget.

The next section prints ADR stats followed by Revenue stats.

Finally, the last section categorizes the rooms by market segment.

Today's Date: 08/31/2012

Report Begins On: 08/01/2012

Back Log Report

Net Rooms - 2012

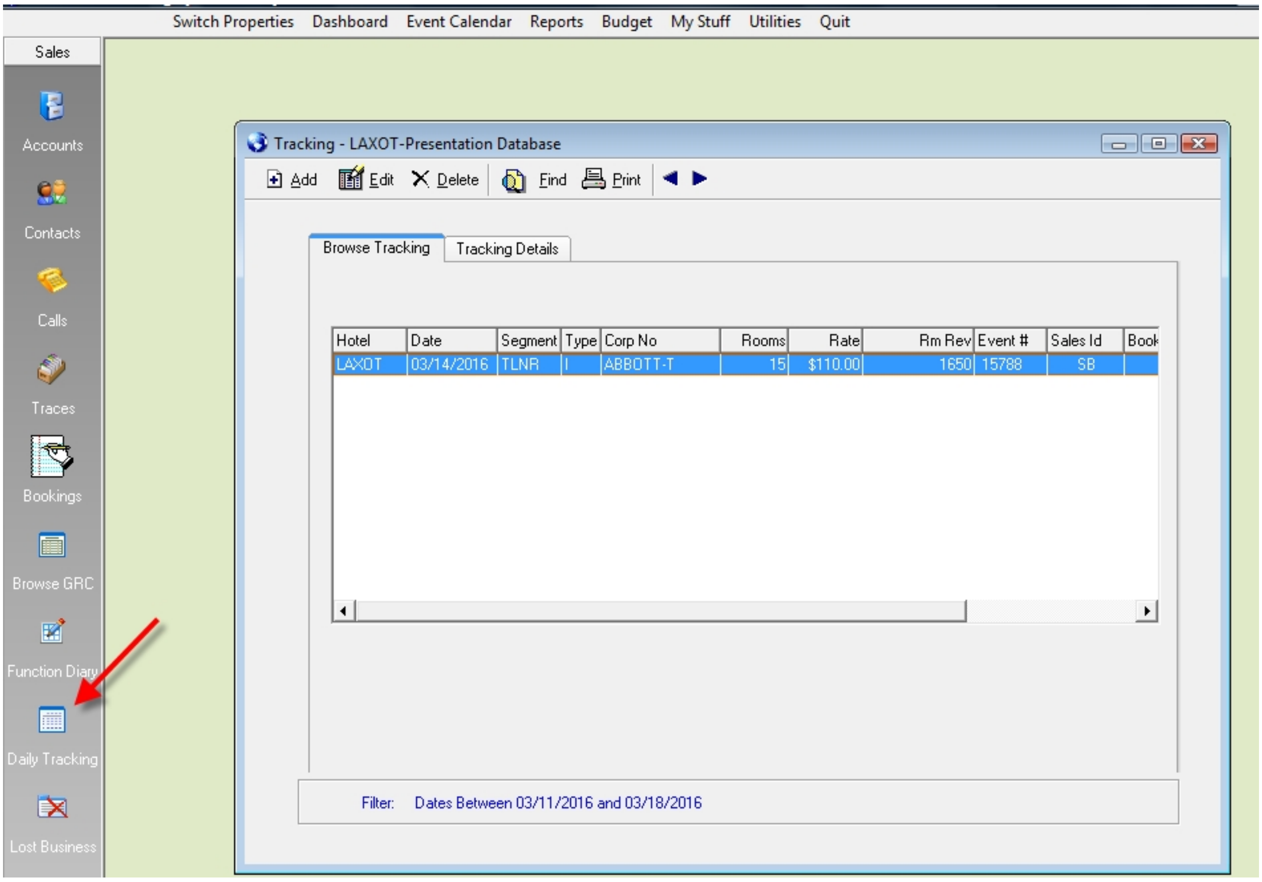
	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Total
Beg Month Definites	0	0	0	0	0	0	0	1,158	1,077	822	644	253	3,954
New Definites	0	0	0	0	0	0	0	179	92	169	15	25	480
Canceled Definites	0	0	0	0	0	0	0	0	0	-201	0	0	-201
Re-Evaluations	0	0	0	0	0	0	0	31	-121	-30	0	50	-70
Net Monthly Change	0	0	0	0	0	0	0	210	-29	-62	15	75	209
End Of Month Definites	0	0	0	0	0	0	0	1,368	1,048	760	659	328	4,163
Actual Rooms	592	568	1,239	727	1,088	981	934	0	0	0	0	0	6,129
Budget Rms	485	365	1,095	999	1,070	1,050	1,739	1,320	1,155	1,400	940	560	12,178
Variance Rms	107	203	144	-272	18	-69	-805	48	-107	-640	-281	-232	0
Tentative Rms	0	0	0	0	0	0	0	57	228	35	5	25	350
Prospect Rms	0	0	0	0	0	0	0	25	115	298	306	5	749
Definite Group ADR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	84.55	85.48	95.70	93.07	91.45	88.71
Actual ADR	86.24	90.49	87.87	92.55	95.06	86.14	86.34	0.00	0.00	0.00	0.00	0.00	89.28
Budget ADR	84.68	86.73	91.30	85.09	78.35	86.01	83.01	81.97	86.71	89.37	87.89	75.93	84.98
Variance ADR	1.56	3.77	-3.43	7.45	16.72	0.14	3.33	2.58	-1.24	6.33	5.17	15.53	
Tentative ADR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	80.19	106.82	89.00	89.00	79.00	98.46
Prospect ADR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	79.00	20.43	66.06	21.98	101.00	41.71
Definite Revenue	0	0	0	0	0	0	0	115,662	89,580	72,735	61,330	29,997	369,304
Actual Revenue	51,055	51,399	108,872	67,281	103,430	84,508	80,642	0	0	0	0	0	547,187
Budget Revenue	41,070	31,655	99,975	85,008	83,830	90,307	144,362	108,203	100,155	125,123	82,621	42,520	1,034,829
Variance-Revenue	-41,070	-31,655	-99,975	-85,008	-83,830	-90,307	-144,362	7,459	-10,575	-52,388	-21,291	-12,523	-665,525
Tentative Revenue	0	0	0	0	0	0	0	4,571	24,356	3,115	445	1,975	34,462
Prospect Revenue	0	0	0	0	0	0	0	1,975	2,350	19,687	6,726	505	31,243
Market Segments													
Catering Only	0	0	0	0	12	9	2	6	0	2	5	5	41
Contract Crew/Perma	0	0	0	0	0	0	0	0	0	0	0	0	0
Group - Association/C	113	26	61	15	167	0	48	50	0	20	99	0	599
Group - Corporate	178	14	479	182	545	308	51	259	113	277	30	85	2,521
Group - Government	0	0	0	0	59	5	0	0	6	0	0	92	162
Group - SMERFE	225	270	400	337	156	437	468	610	756	720	913	151	5,443
Group - Tour / Travel	0	0	0	30	0	0	33	0	0	0	0	0	63
UnKnown Segment	76	258	299	163	149	222	332	443	197	13	15	10	2.177
Total	592	568	1,239	727	1,088	981	934	1,368	1,072	1,032	1,062	343	11,006

Daily Tracking

Daily Tracking

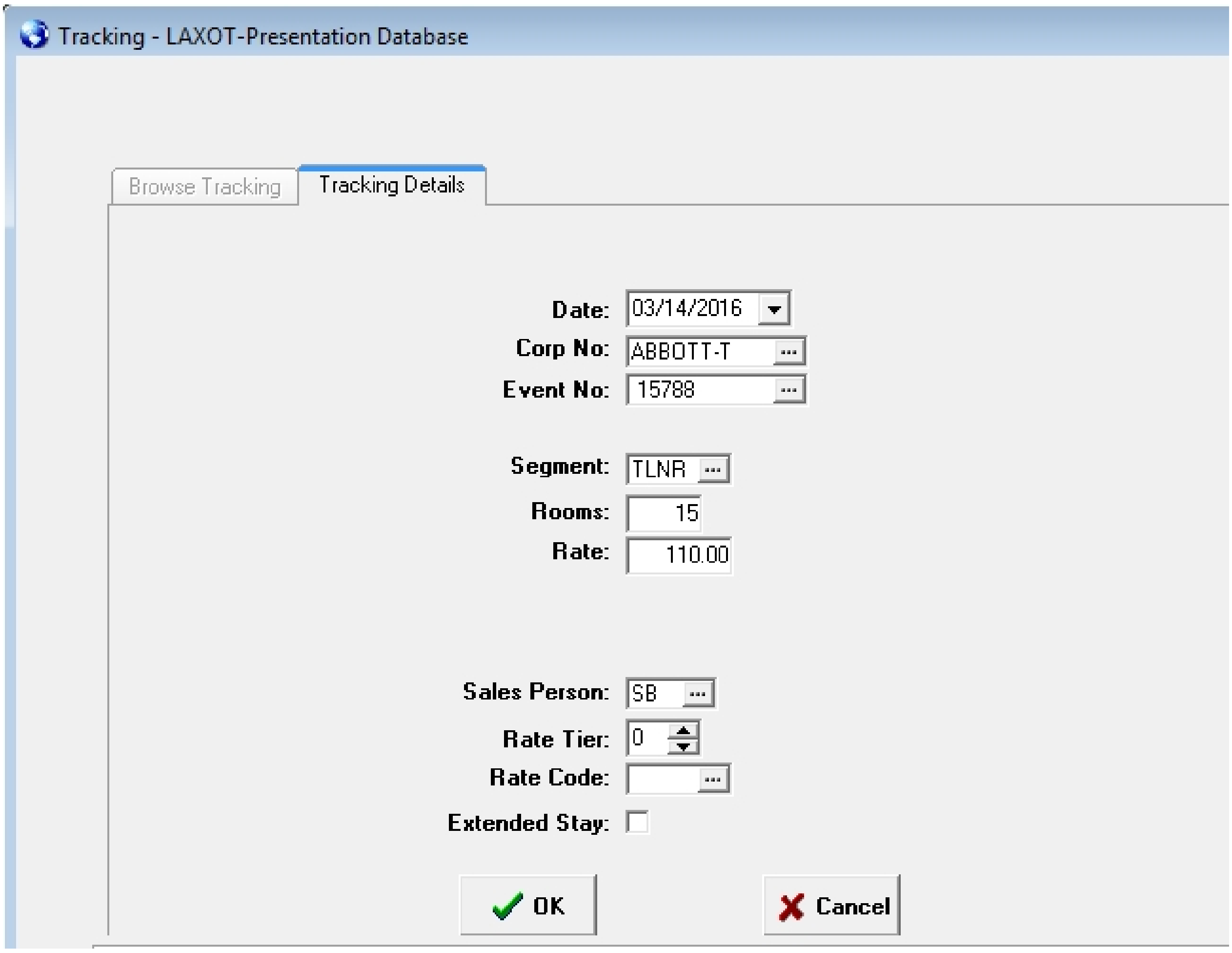
The Daily Tracking module allows you to track transient and group rooms for targeted accounts. Minimally you should post activity by month but you can also post weekly or daily transactions by account. This module is widely used for tracking LNR accounts.

Print the proper tracking report from your property management system that lists the room nights and revenue information by account.



To access the Daily Tracking screen, click the Daily Tracking icon on the left menu.

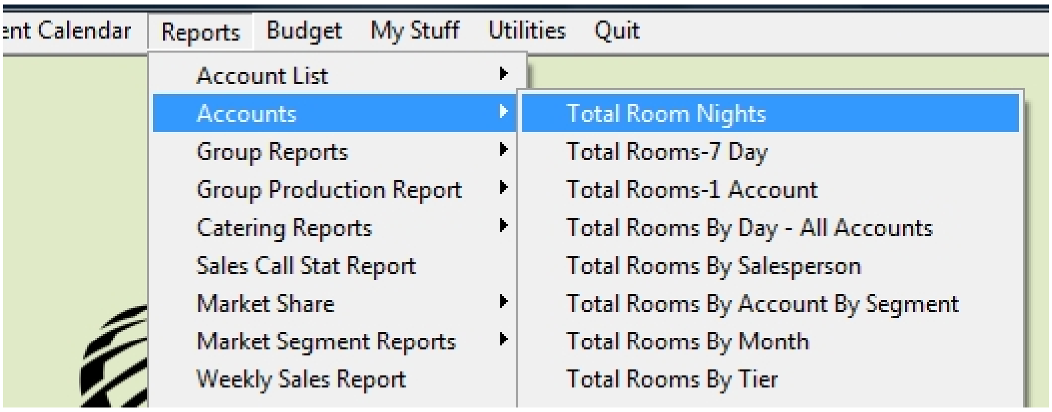
Daily Tracking – Adding Transactions



Once open, click the Add button.

- Choose the date you are posting tracking for.
- Choose the account you are posting tracking for.
- If the transaction is related to a group booking, choose the Event No.
- Verify the segment. Choose a different segment if necessary.
- Enter the rooms and rate.
- Click OK to save.
- Repeat process until all transactions are posted.
- Click Cancel when finished.

Daily Tracking – Reporting



The first 8 reports under Reports | Accounts are generated from the information posted under the Daily Tracking module. These reports have various formats and allow you to compare tracking for current year vs last year along with day of week analysis.

Email Blast - Outlook

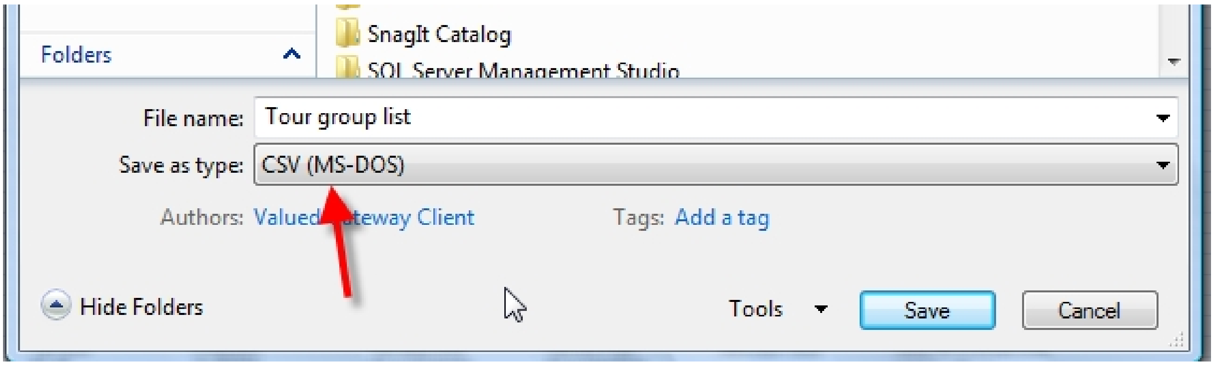
Outlook Email Blast using Excel Spreadsheet as Datasource

Below find steps for importing email addresses into Outlook from an Excel spreadsheet. Once imported, you will be able to send an email blast for Outlook utilizing these addresses. The steps below detail the process but you can also refer to a Microsoft support bulletin by clicking the link below.
http://support.microsoft.com/kb/295664

Saving The Excel Spreadsheet To CSV File Format
The first step is to save the Excel Spreadsheet to a CSV format.

1. Open the spreadsheet with the email addresses.
2. Highlight the range of data. Once the range is highlighted, click File | Save As.
3. When the Save window appears, choose a folder to save the file in where you can easily find it later. Change the name of the file if needed.
4. Choose CSV (MS-DOS) from the Save as Type drop down.
5. Click Save.

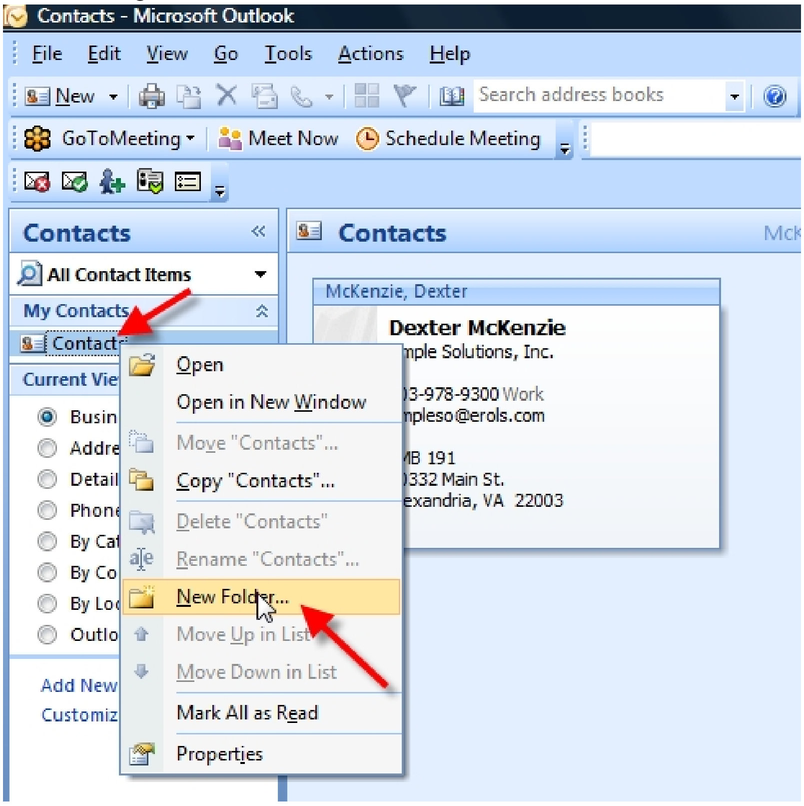
The file is now saved as a CSV file. The next step is importing the file into Outlook.


Folders
SnagIt Catalog
SQL Server Management Studio
File name: Tour group list
Save as type: CSV (MS-DOS)
Authors:
Tags: Add a tag
Hide Folders
Tools
Save
Cancel

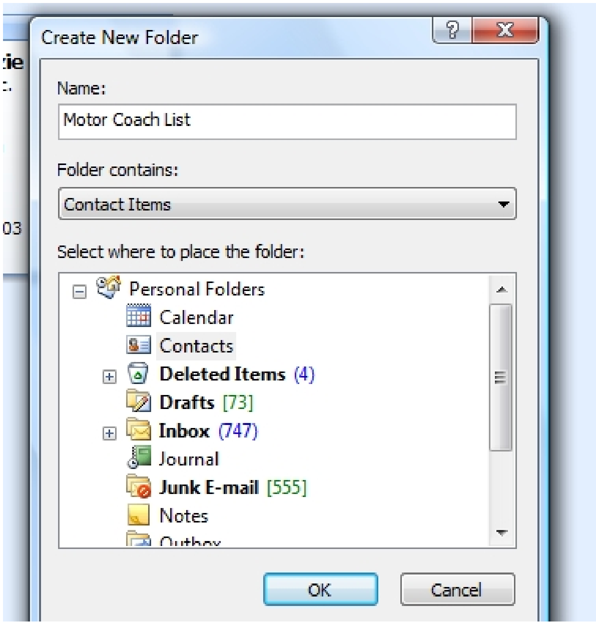
Importing CSV File Into Outlook

The next step is to create a new Folder in your Contact section in Outlook. You will import the information into that folder.

1. Start Outlook. Click the Contacts button to open that section.
2. Next, right click over the Contacts folder and choose "New Folder".

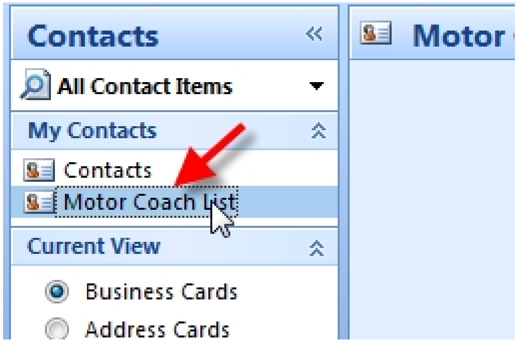


3. Type the name of the new Folder. Below I typed Motor Coach List.
4. Click OK.

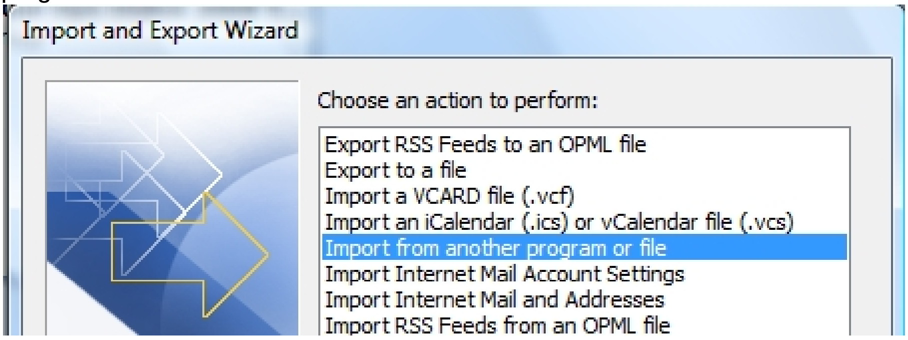


Importing CSV File Into Outlook….

5. You now have a new Folder named Motor Coach List

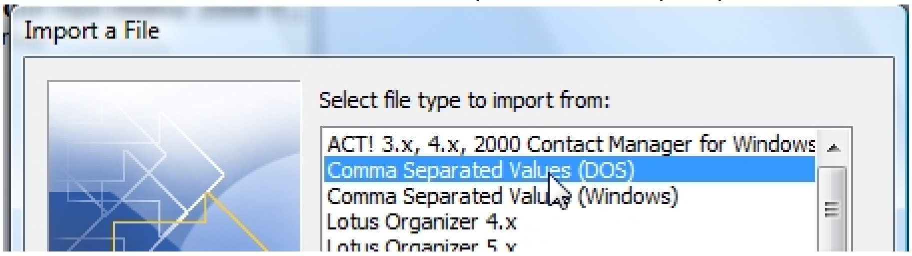


6. Next, click File | Import / Export. When the next screen appears, choose "Import from another program/file".



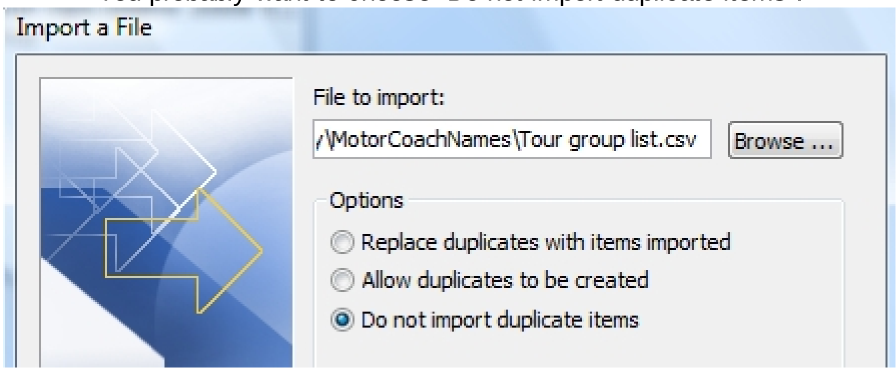
7.

8. Click Next. Choose "Comma Separated Values (DOS)"



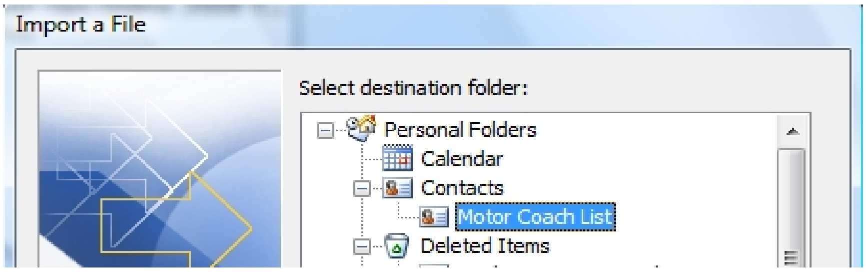
9. Click Next.

10. Click the Browse button and locate the CSV file you saved at the beginning of these instructions. You probably want to choose "Do not import duplicate items".



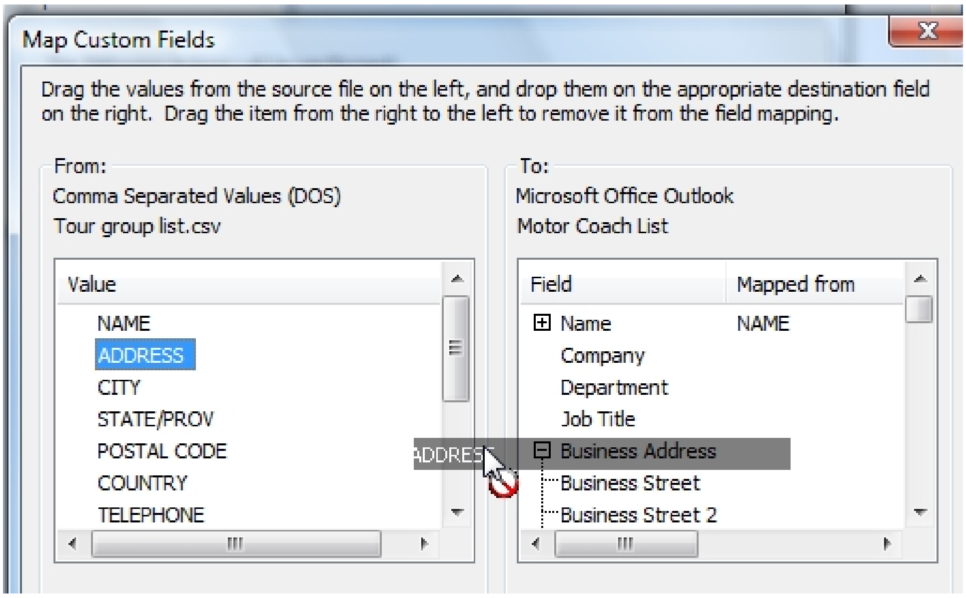
11. Click Next.

Importing CSV File Into Outlook…

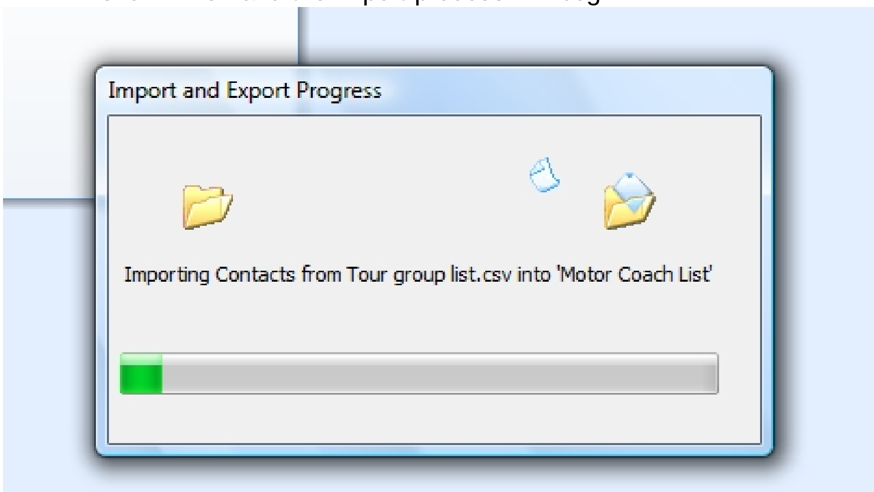


12. Choose the New Motor Coach List folder for the Destination and click Next.

13. In many cases it may be helpful to "Map" the fields from your spreadsheet to the corresponding fields in Outlook. Click Map Fields. When the next screen appears, you can "drag" the fields on the left (fields from your spreadsheet) and drop them on the corresponding fields to the right (fields in Outlook).

14. 

15. Once you have the fields Mapped over click OK and you will be returned to the previous window. Click Finish and the Import process will begin.

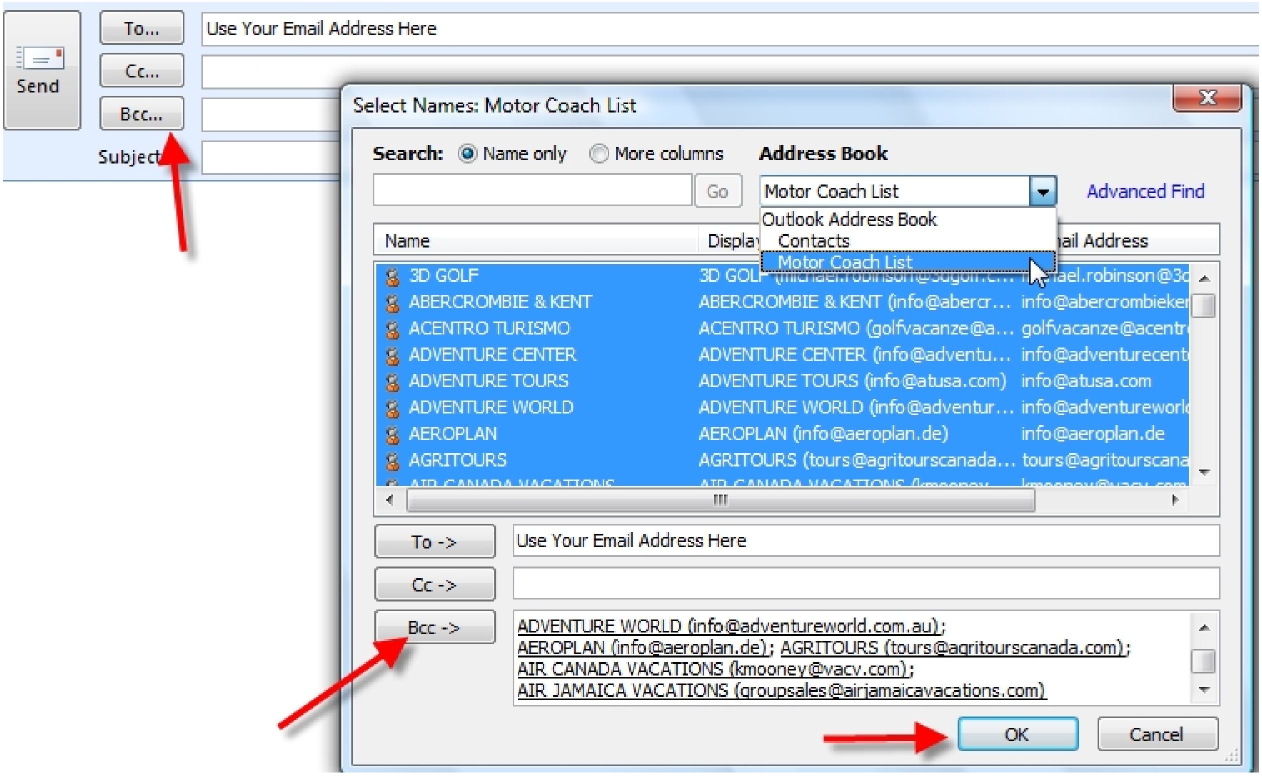


When the import process is finished you will be returned to the Contact view. You should see all of the contact/companies you imported. You now have these names and addresses in your Outlook Contact address book under a separate Distribution List. The next step is to create your email and choose this distribution list for the recipients.

Creating Your Email

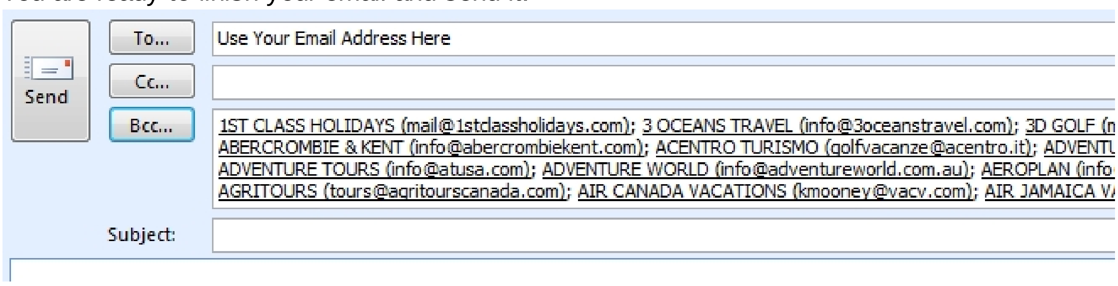
The last step is to create your email in Outlook and drop in the recipients. It is recommended you send the email to yourself and use the BCC (blind carbon copy) field for inserting the email addresses into. Doing so will stop each recipient from seeing the other recipients you are sending the email to.

1. In Outlook start a new email message.
2. Click the Bcc field on the top of the email.
3. Click the drop down and choose your new folder.



4. Highlight the names you want to insert. Click the Bcc button at the bottom of the window and click OK to insert the email addresses into the Bcc field.

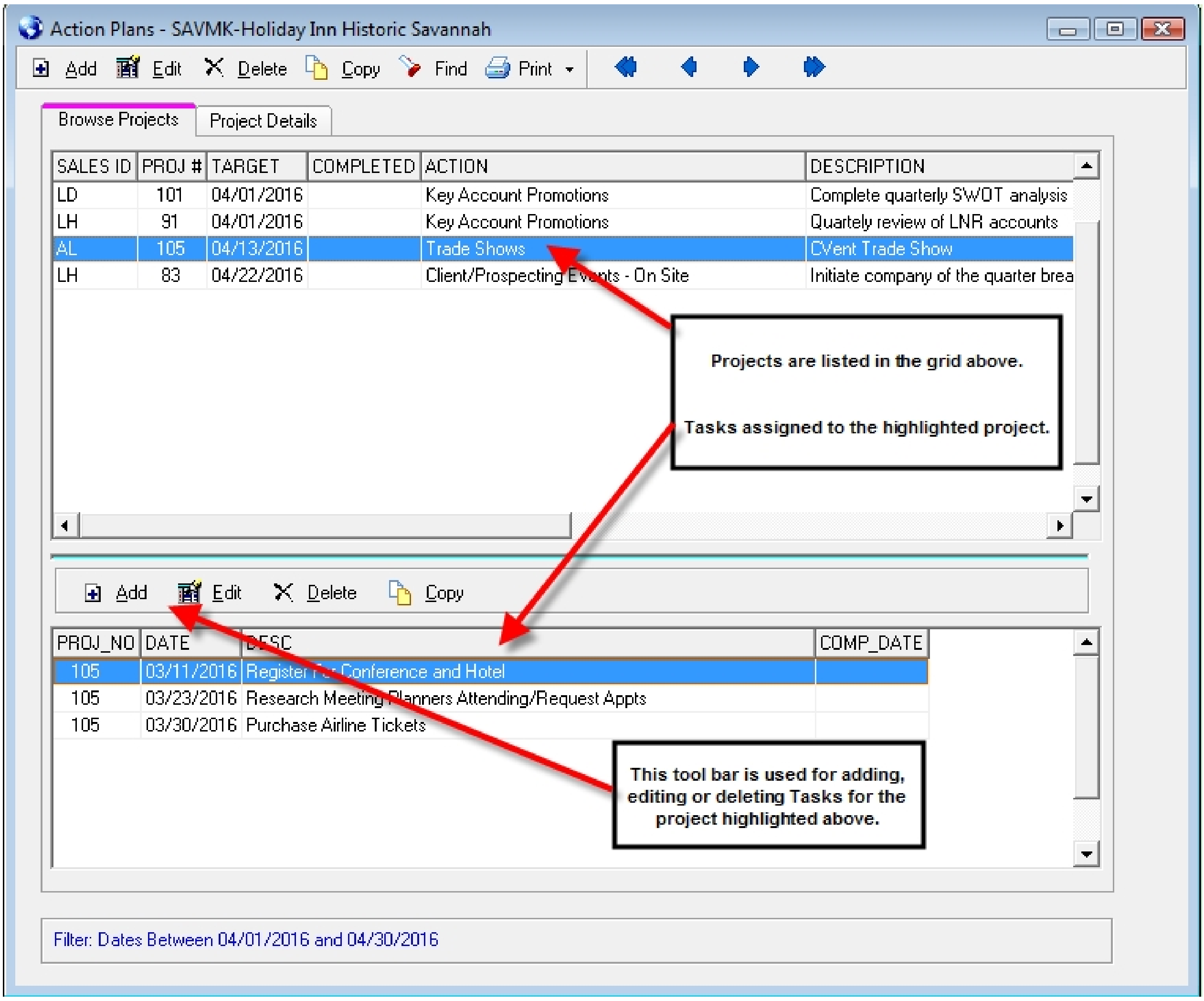
5. You are ready to finish your email and send it.



Sales Action Plan Module

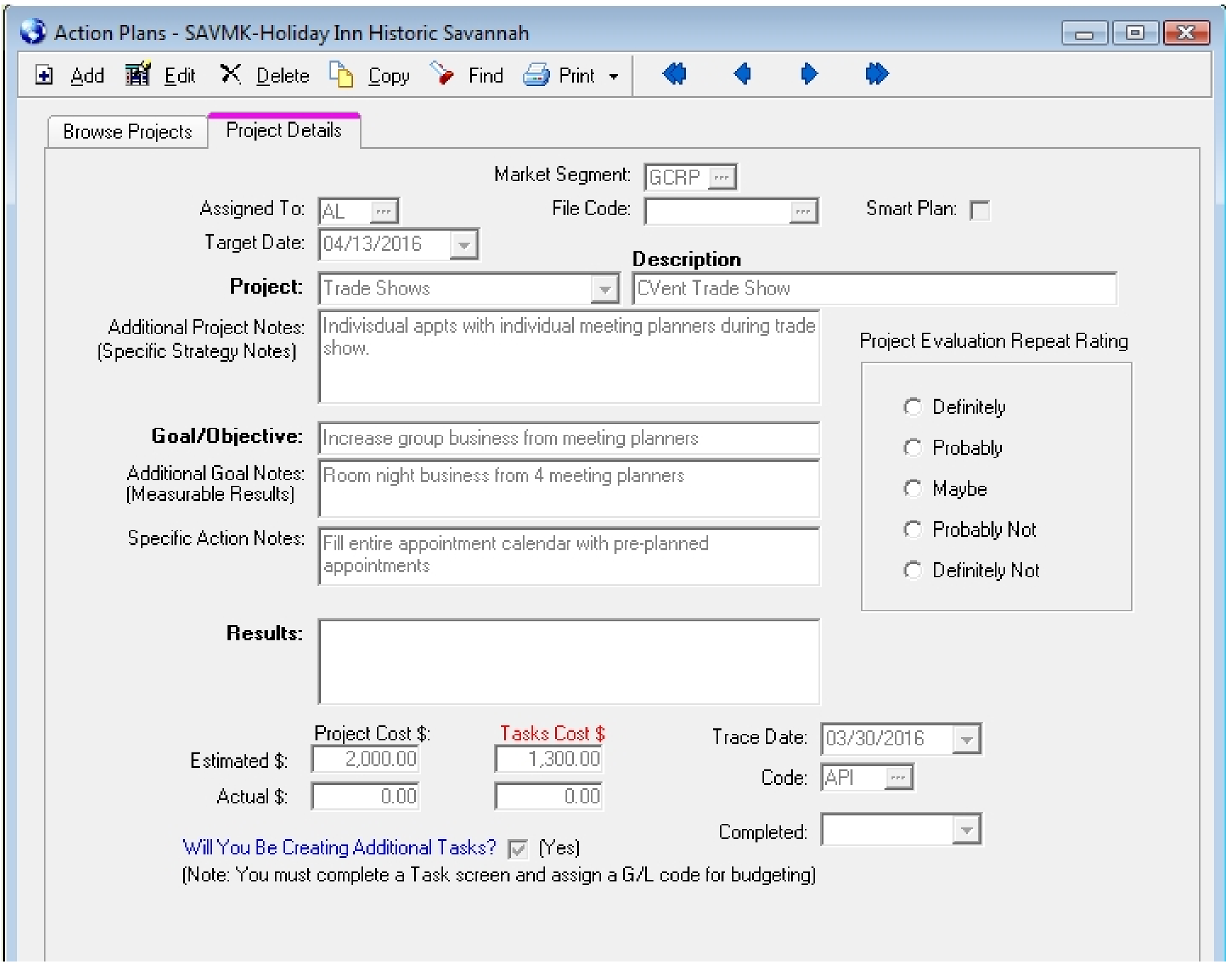
SALES ACTION PLAN

The Sales Action Plan module is a full-featured project management tool that allows sales people to enter and track major sales objectives for the future. Not only can you enter the details of the Project but assign “Tasks” that are needed to support the Project. Also, you can trace tasks that are assigned to projects, and these traces will appear with your other traces. Additionally, you can assign costs, by general ledger code, and produce budget reports making your budgeting process easier.



The tool bar at the top of the screen is used for Adding, Editing, Deleting or Finding Projects. Once a Project is added you can then use the tool bar above the lower grid to add Project Tasks.

Sales Action Plan – Adding Projects



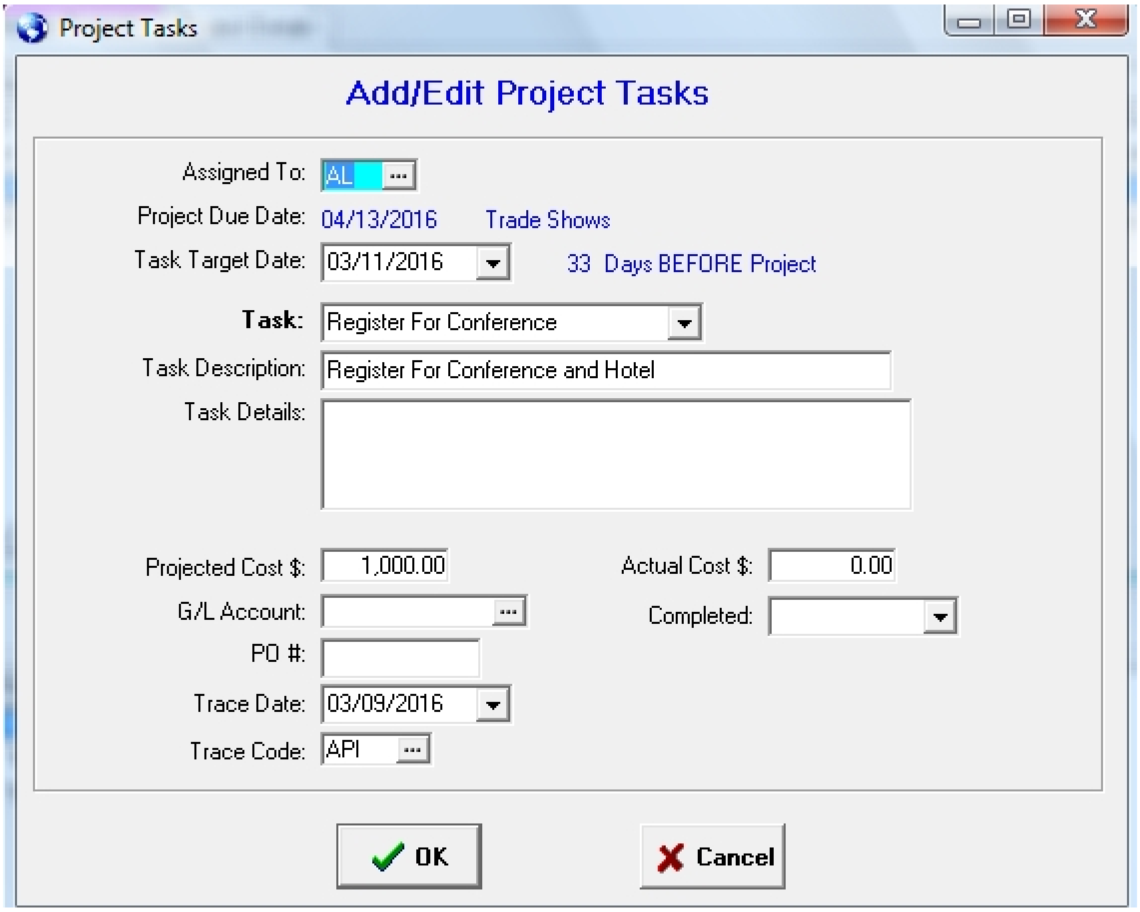
To Add a new Project, click the Add button on the tool bar. Below find descriptions of each field:

- **Assigned To** – Salesperson the Project is assigned to.
- **Market Segment** – Segment you are targeting with this Project.
- **File Code** – If the project is related to an account, choose the File Code
- **Target Date** – Target completion date of the Project.
- **Project** – Choose a Project from the drop down list. Project codes can be added in Utilities | Table Maintenance | Action Plan Codes.
- **Description** – You can describe the project in this field.
- **Additional Project Notes** – Use this space to fully describe the Project.
- **Goal/Objective** – Describe the Goal/Objective of this project.
- **Additional Goal Notes** – If needed, you can use this space to further describe the Goal/Objective.
- **Results** – After the Project is completed, use this space to describe, in detail, if you achieved the desired Goal/Objective as a result of this Project.
- **Projected Costs $** - Enter the "Projected" forecast cost of the project. The Actual $ (dollars) under Project Cost would only be entered after the project is completed.
- **Tasks Cost $** - The Task Cost fields are "read only". You cannot enter numbers directly into these fields; task cost amounts are updated automatically as you add Tasks.
- **Will You Be Creating Additional Tasks?** – Each project should have at least 1 task associated with it. This box should be checked if you will be "manually" adding Tasks for the Project. If you check this box an "Add Task" screen will appear automatically when you save the Project. If you do not check this box, a Task will be automatically added for you. You may Edit the Task as necessary.
- **Trace Date/Code** – Use these fields to automatically add a trace for the Project.
- **Completed** – Enter the date the Project is completed.
- **Repeat Rating** – Once you have completed a Project, rate the Project for the likelihood of

repeating this Project in the future.

Sales Action Plan – Adding Tasks

Project "Tasks" are the real detail of what processes and activities need to occur to properly support a Project. Once a Project has been added, you can click on the Add button, on the lower toolbar on the Browse Project screen, to add Project Tasks.

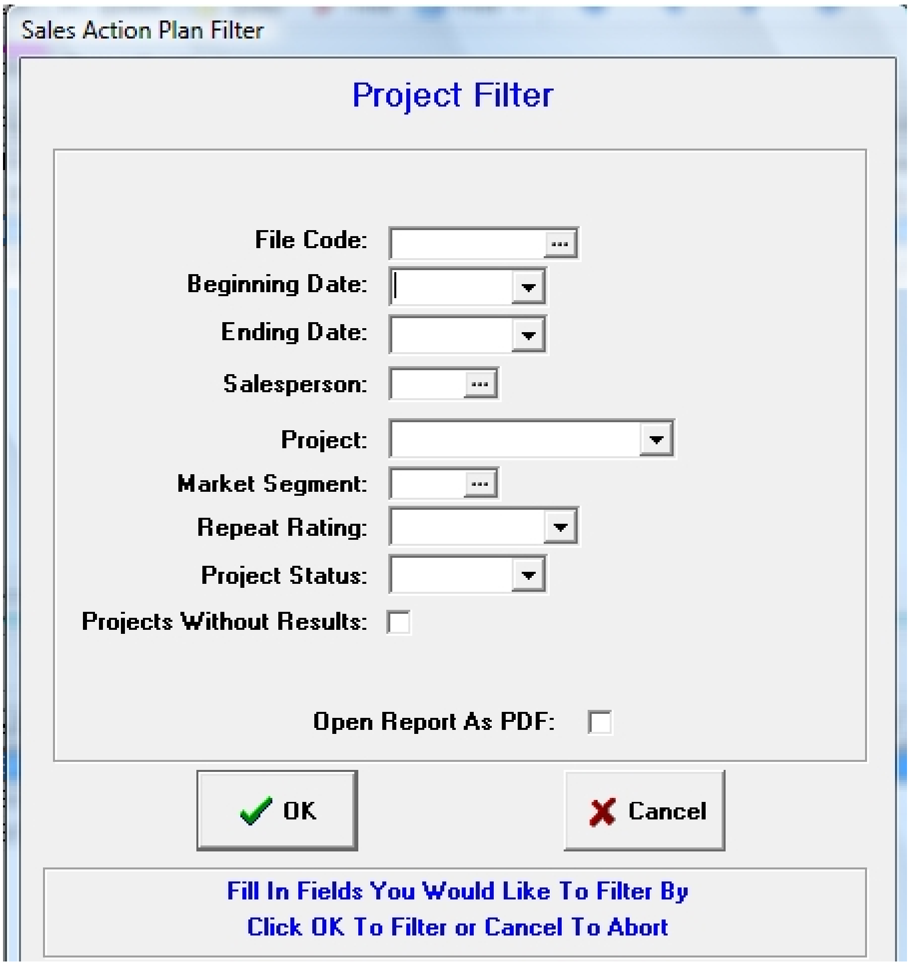


Below find descriptions of each field:

- **Assigned To** – Salesperson to whom the Project is assigned.
- **Project Due Date** – Project completion due date.
- **Task Target Date** – Target completion date of the Task you are adding. Once you enter a date and tab off the field, the number of days before/after the Project due date will be calculated and displayed.
- **Task** – Choose a Task Code from the drop down list. Task codes can be added in Utilities | Table Maintenance | Project Tasks Codes.
- **Task Description** – You can describe the Task in this field.
- **Task Details** – Use this space to further describe the Task.
- **Projected Costs $** - Enter the "Projected" forecast cost of the Task.
- **G/L Account** – You can assign the cost of this task to a G/L Account. Doing so will allow you to print a Budget Report detailing the forecast costs by month.
- **PO #** - You can enter a Purchase Order number that is associated with this Task.
- **Trace Date/Code** – Use these fields to add a trace for the Task.
- **Actual Cost $** - Once the Task is completed, you can enter the Actual Cost incurred for this Task.
- **Completed** – Enter the date the Task is completed.

Sales Action Plan – Find

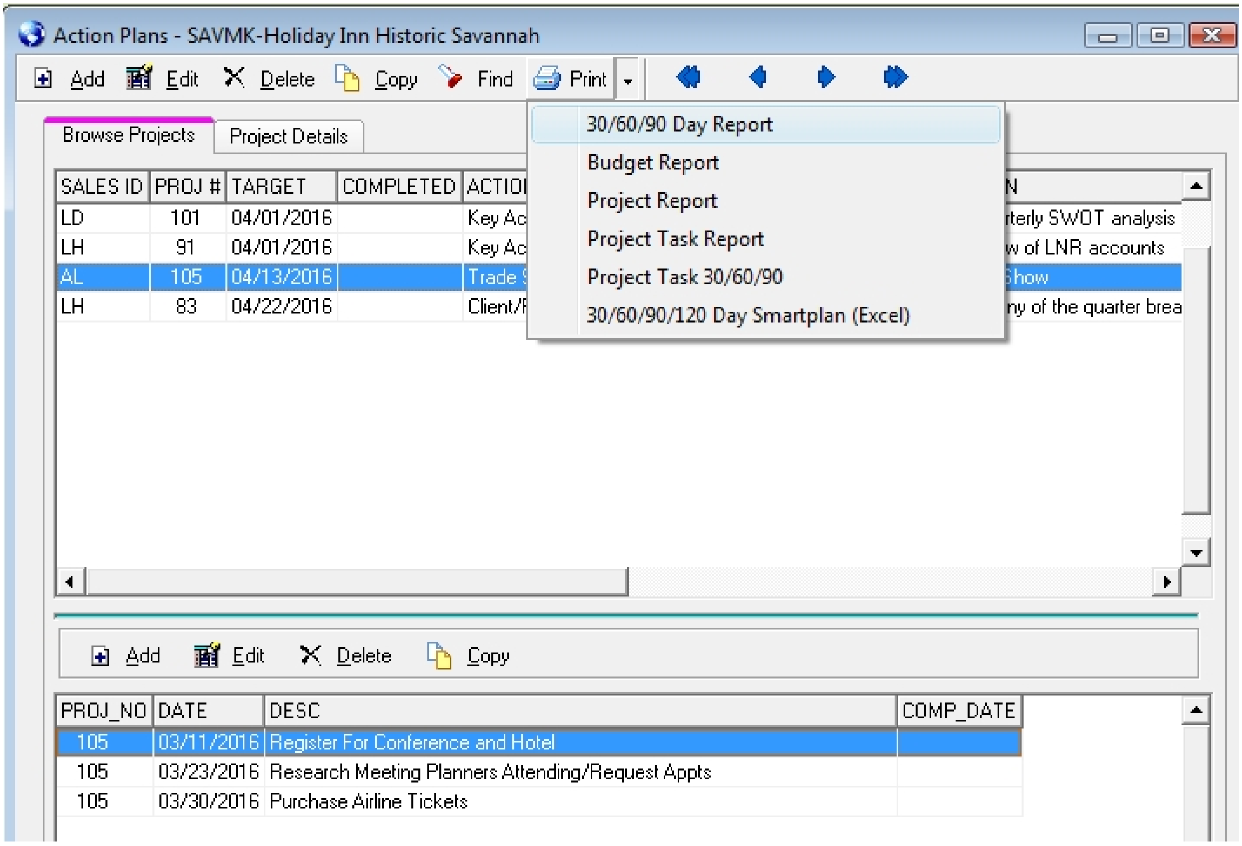
The Find button on the Project screen allows you to "Find" Projects based on some or all of the criteria below.



Enter information in the fields by which you would like to search. Leave the other fields blank. The more fields you fill in, the more specific the search.

Sales Action Plan – Print Report

You have a choice of 6 different reports relating to the Sales Action Plan module in STS. Click on the down arrow to the right of the Print button on the Projects toolbar. Below please find descriptions of each report.



30/60/90 Day Report – This report will prompt you for a starting month, year and salesperson id. The report will then print all Project activity along with associated Tasks.

Budget Report – The Budget Report will print Task costs, by G/L Code, by Month. You must add Tasks for each Project and enter the proper G/L Code, on the Task screen, for this report to be meaningful. If utilized properly, this report is a good tool for budgeting next years' Sales/Marketing Actions.

Project Report – This report will print all Projects that fall within the criteria entered on the Find screen. Each Project and the associated Tasks will be printed.

Project Task Report – The main focus of this report are the Project “Tasks”. This report would be synonymous with a “To-Do” list for the project. It is recommended that this report be printed on a regular basis to view upcoming tasks and target dates.

Project Task 30/60/90 Report – This report prints project “tasks” in the 30/60/90 day format

30/60/90/120 Day Smartplan (Excel) – This report exports projects, where the Smart Plan box is checked, to Excel.

Sales Call Points and Goals

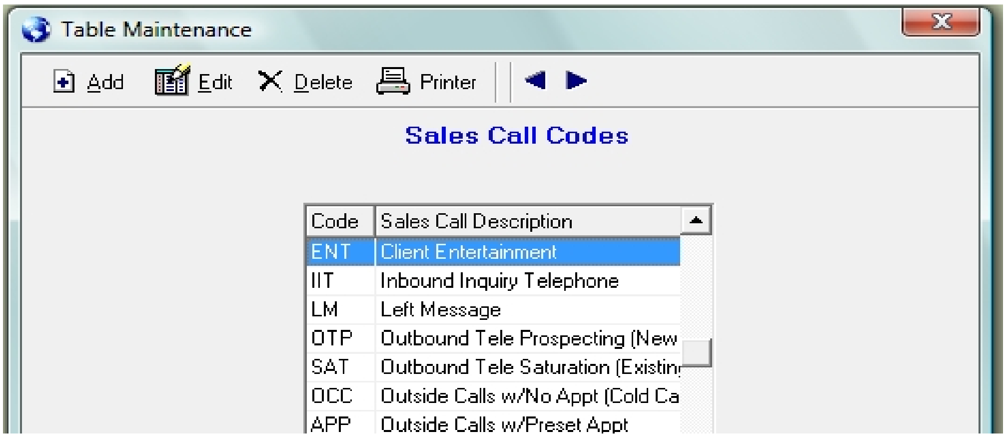
Loading Sales Call Goals / Call Point Values

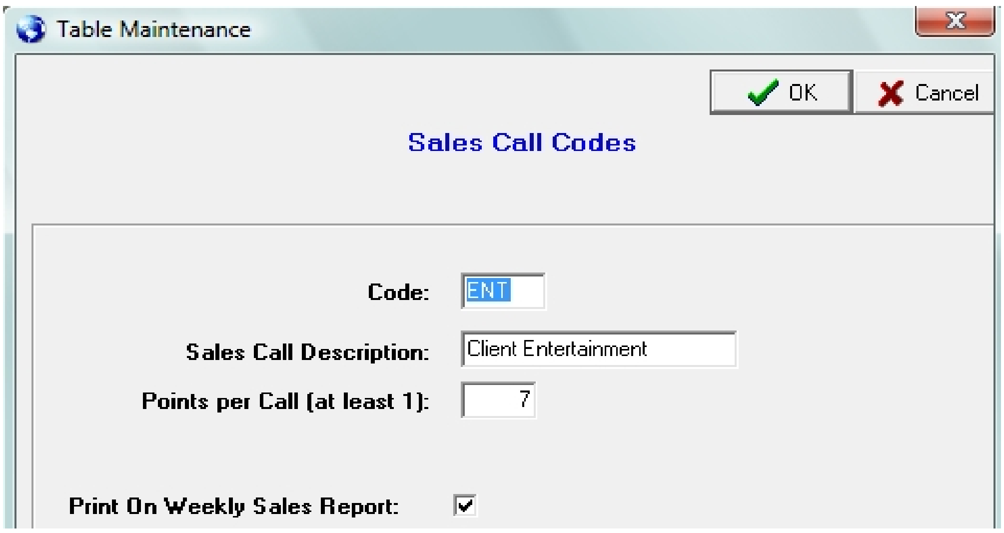
STS allows hotels to enter their monthly sales call goals, by call type. It also allows a point value to be assigned for each call type potentially making certain call types more valuable than others. A typical scenario might be a Hotel Tour has a higher value than a Prospecting-Telephone call. In this situation a Hotel Tour should have a higher point value. Once point values are established, users can also enter their monthly call goal by call type.

Below are steps for reviewing/setting point values per call type along with steps for loading the monthly call goals by sales person.

Reviewing / Modifying Sales Call Point Values

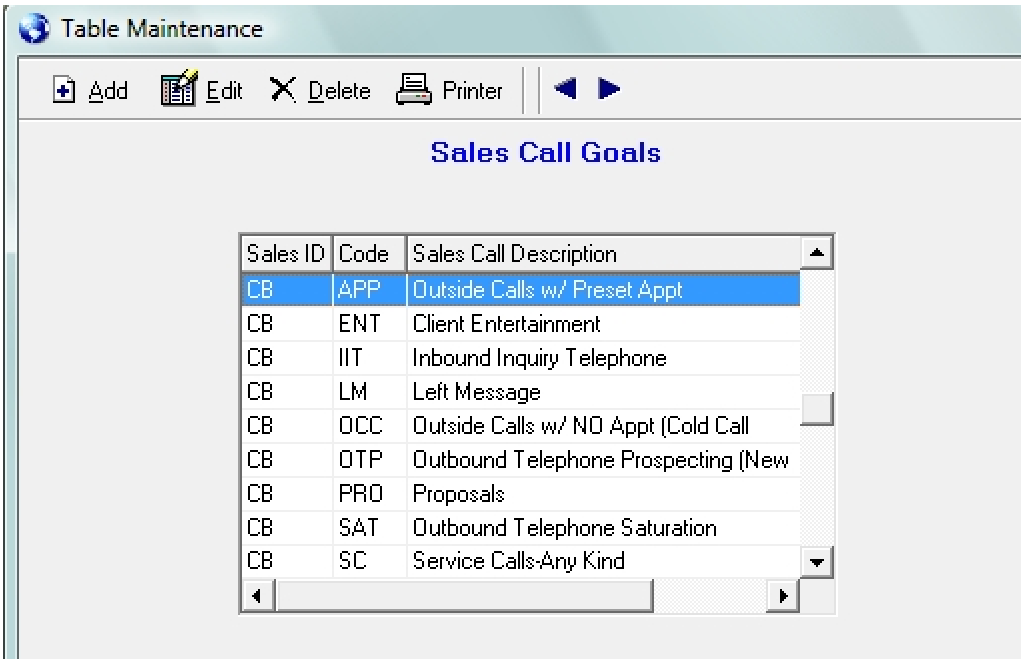
1. Start STS.
2. Click Utilities | Table Maintenance | Sales Call **Codes**.
3. Highlight the code you would like to review. Click Edit. The point value should match the value in the approved chart (see chart on the last page of this document) field is on this screen. You should ignore the "Minutes" field.
4. If the point value varies from the approved value (see chart on last page) make the necessary point change and click OK.

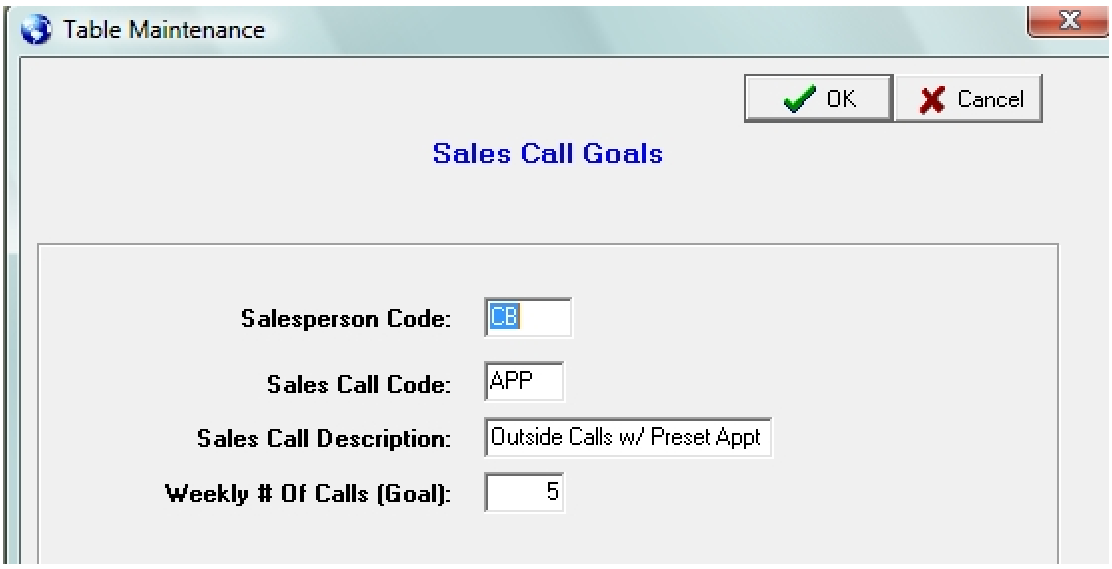




Adding / Modifying Sales Call Goals

1. Start STS.
2. Click Utilities | Table Maintenance | Sales Call **Goals**.
3. Monthly call goals can be entered by sales person, by call type.
4. If adding a call goal, click Add. Enter the sales person's initials, sales call code, sales call description and "monthly" goal. Click OK to save.
5. If modifying a goal, highlight the call code, click Edit. Make any necessary changes and click OK.



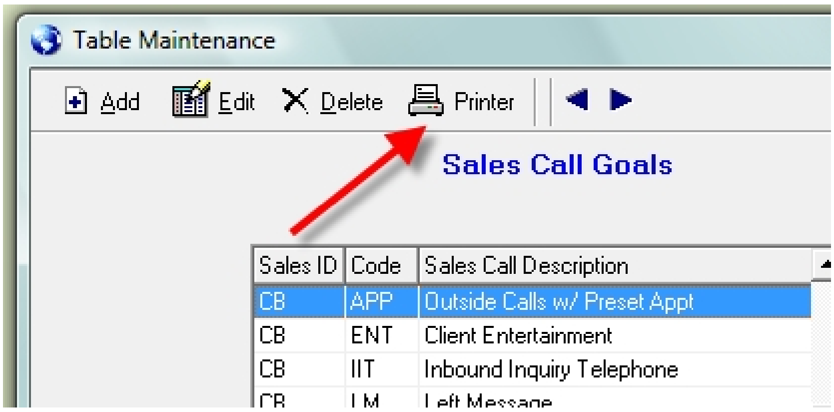


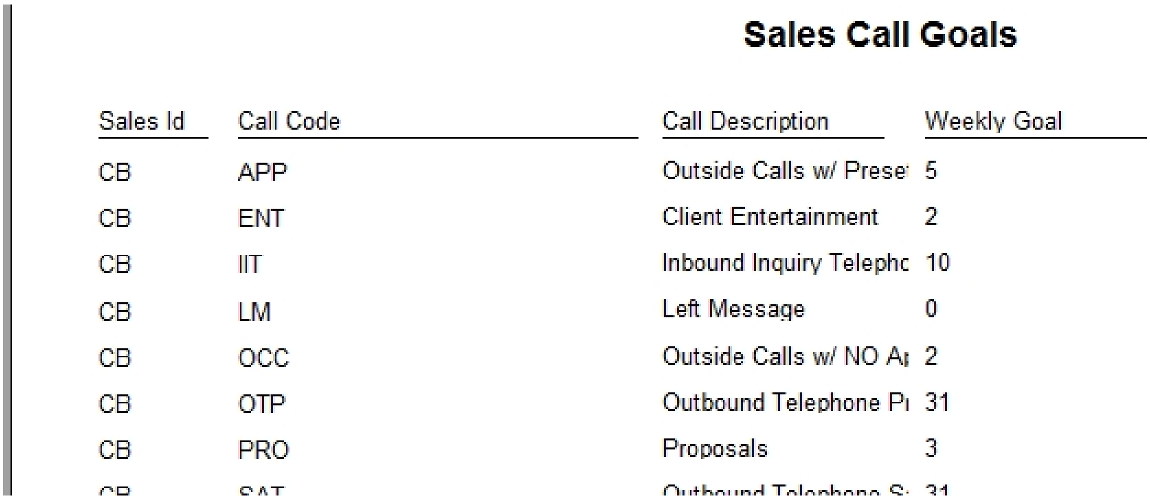
Sales Call Point Values

The codes and goals above are only examples. You can modify and customize your call types and point values to match your specific needs. If you do not want to use the "weighted" approach by assigning different point values to your different sales call codes, just set the point value to 1 for each sales call code.

Printing Goal Report

Finally, you can use the Print button to print a snapshot of the Goals entered. This can make it easy to review/verify the correct goals are loaded per sales person.





Sales Call Goals

Sales Id	Call Code	Call Description	Weekly Goal
CB	APP	Outside Calls w/ Prese	5
CB	ENT	Client Entertainment	2
CB	IIT	Inbound Inquiry Telephc	10
CB	LM	Left Message	0
CB	OCC	Outside Calls w/ NO A	2
CB	OTP	Outbound Telephone P	31
CB	PRO	Proposals	3

Sales Call Goals

Loading Sales Call Goals

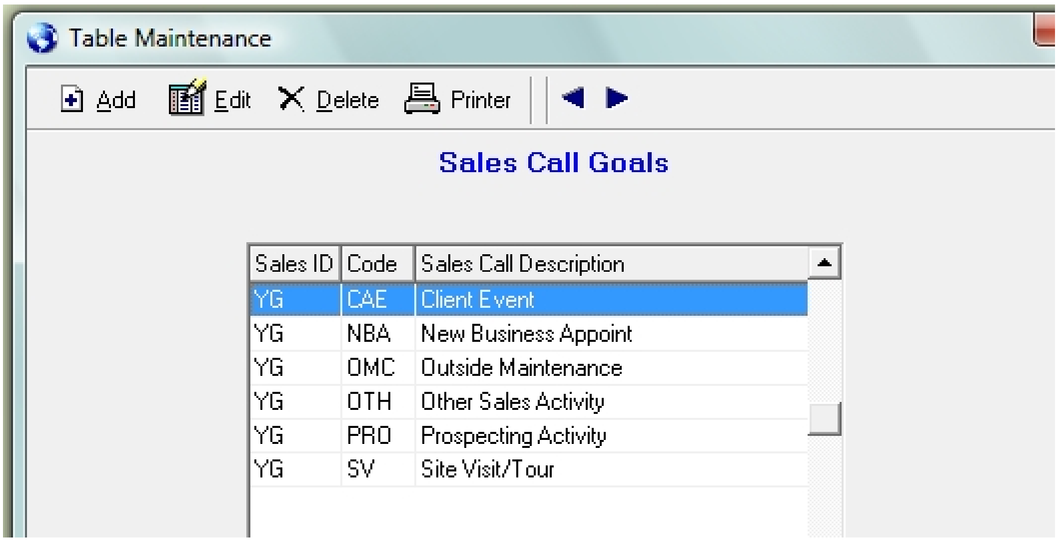
STS allows hotels to enter their monthly or weekly sales call goals, by call type.

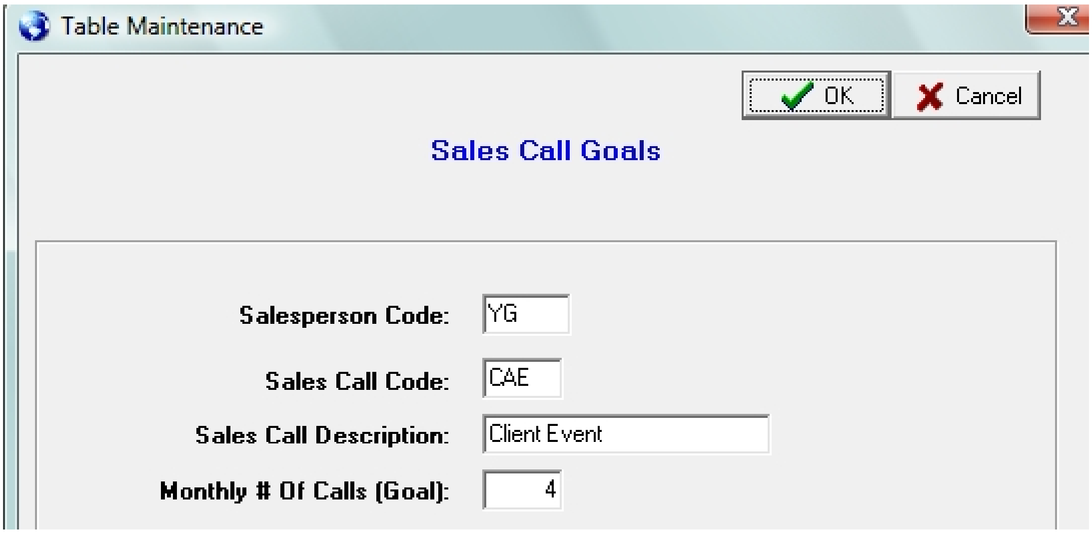
Below are steps for loading the sales call goals by sales person.

Adding / Modifying Sales Call Goals

1. Start STS.
2. Click Utilities | Table Maintenance | Sales Call **Goals**.
3. Monthly call goals can be entered by sales person, by call type.
4. If adding a call goal, click Add. Enter the sales person's initials, sales call code, sales call description and "monthly" goal. Click OK to save. Repeat to add goals as needed.

5. If modifying a goal, highlight the call code, click Edit. Make any necessary changes and click OK.





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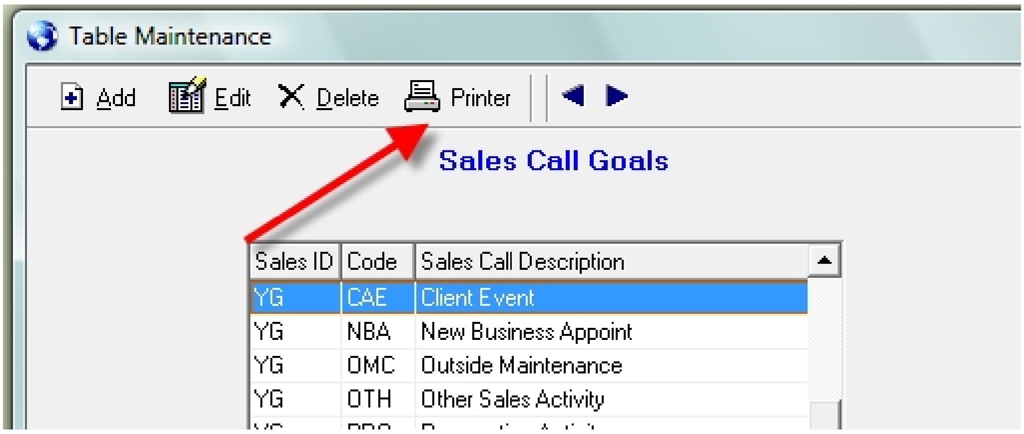



Sales Call Goals

Sales Id	Call Code	Call Description	Monthly Goal
YG	CAE	Client Event	4
YG	NBA	New Business Appoint	20
YG	OMC	Outside Maintenance	20
YG	OTH	Other Sales Activity	0

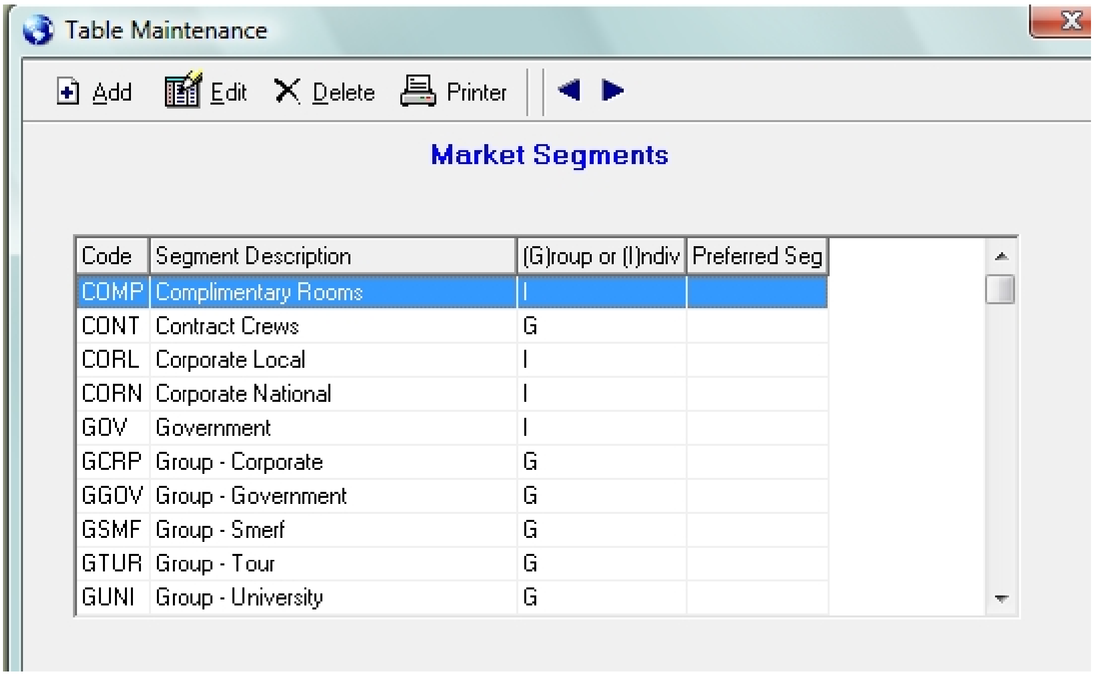
Group Budget Data Entry

Loading / Verifying Group Budget Numbers

STS allows you to enter you hotel's group budget by market segment. These group budget numbers will print on two key group reports. The Annual Report by Month and the Group Pace Report. Below find steps for loading and verifying your group budget numbers are loaded correctly.

Verify Market Segments
STS allows you to mark your market segments with **G** for group or **I** for individual. You should verify your segments are marked properly. Click Utilities | Table Maintenance | Market Segments. Notice the "(G)roup or (I)ndiv' column.

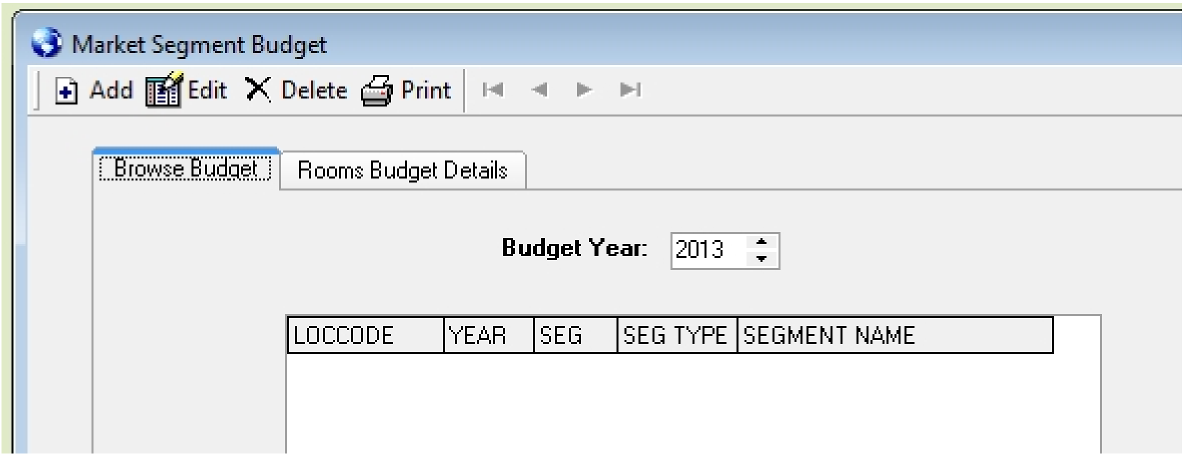
All group segments should be marked as a "G" type. The actual code used for these two group segments is not as important as having a Group Corporate and Group Non-Corporate segment available to load your group budget into STS.



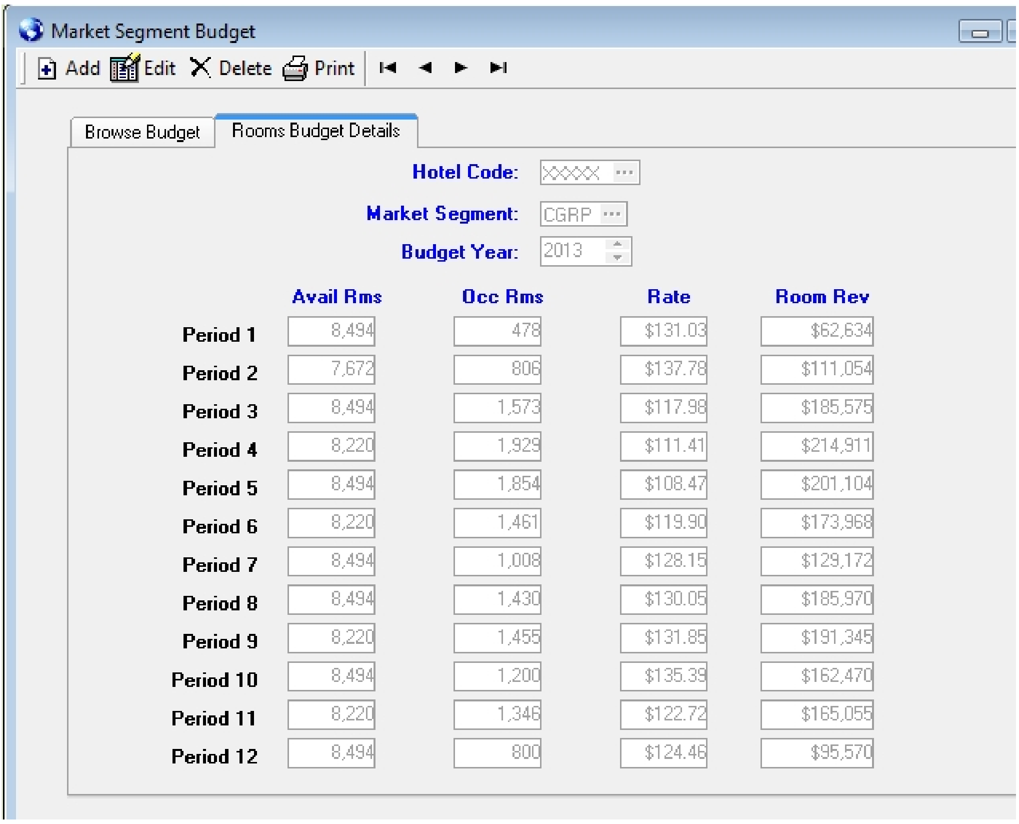
Code	Segment Description	(G)roup or (I)ndiv	Preferred Seg
COMP	Complimentary Rooms	I	
CONT	Contract Crews	G	
CORL	Corporate Local	I	
CORN	Corporate National	I	
GOV	Government	I	
GCRP	Group - Corporate	G	
GGOV	Group - Government	G	
GSMF	Group - Smerf	G	
GTUR	Group - Tour	G	
GUNI	Group - University	G	

Load/Verify Budget

Once you have verified your segments you can load/verify your **group** budget numbers. Click Budget | Rooms Budget. Verify/change the year as needed. You should see a list of segments if any budget numbers have been loaded previously. If not, you will be presented with a blank list.

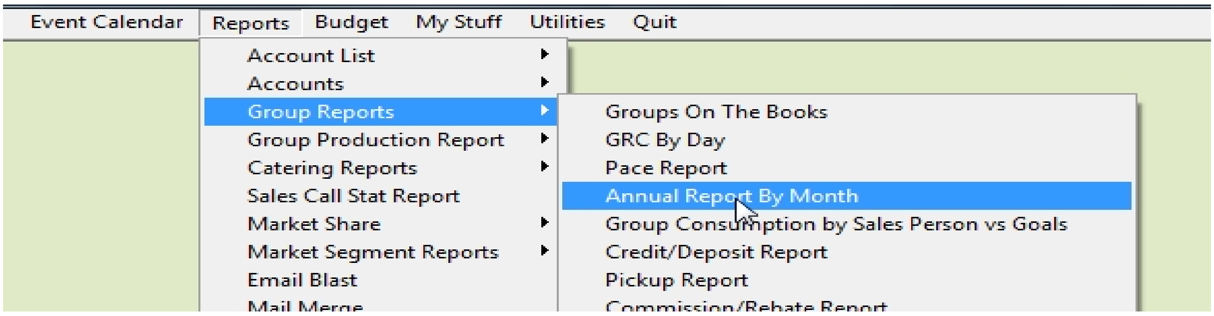


Click **Add**. Choose your hotel code and one of your group segments.



If you are loading **new** budget numbers you only have to key in 4 numbers for each month. Total available rooms for each month, budgeted occupied rooms, rate and room revenue for the segment you are loading. Please note, STS does not calculate any of these numbers. You should enter the numbers printed on your approved budget report. Once you have entered all 12 months, click OK to save. Repeat the process until you have loaded your group budget by segment. You can also load your transient budget if desired.

Running Reports/Verifying Numbers
The Annual Report by Month (Reports | Groups | Annual Report By Month) is a great report to verify your **group** budget numbers. Print this report once you have entered/verified your group budget numbers to ensure your budget is loaded correctly. This is one of the reports that is being reviewed weekly.



After running the report, review the Budget section for accuracy. If you see any discrepancies you would correct those by reviewing/correcting your budget numbers as describe previously.

Segment: All Segments
Sub-Segment: All Sub-Segments
Business Source: All Sources
Salesperson: All Salespersons

Annual Report - By Month
Net Rooms - Definite, Tentative and Prospect
Actual + Blocked Rooms

	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Total
Current Year													
Definite Rms	250	330	1,212	901	861	413	261	51	240	128	169	55	4,871
Definite Rev	30,630	52,182	142,205	93,743	87,072	47,225	30,881	6,470	30,091	14,357	14,833	5,556	555,245
Definite ADR	122.52	158.13	117.33	104.04	101.13	114.35	118.32	126.86	125.38	112.16	87.77	101.02	113.99
Tentative Rms	0	0	114	0	18	113	44	142	76	70	0	55	632
Tentative Rev	0	0	16,146	0	2,392	14,927	4,996	17,858	8,964	8,080	0	6,985	80,348
Tentative ADR	0.00	0.00	141.63	0.00	132.89	132.10	113.55	125.76	117.95	115.43	0.00	127.00	127.13
Prospect Rms	0	0	0	0	315	26	60	30	0	26	0	0	457
Prospect Rev	0	0	0	0	51,885	4,394	9,540	4,950	0	4,654	0	0	75,423
Prospect ADR	0.00	0.00	0.00	0.00	164.71	169.00	159.00	165.00	0.00	179.00	0.00	0.00	165.04
Total Rms	250	330	1,326	901	1,194	552	365	223	316	224	169	110	5,960
Total Rev	30,630	52,182	158,351	93,743	141,349	66,546	45,417	29,278	39,055	27,091	14,833	12,541	711,016
Total ADR	122.52	[illegible]	119.42	104.04	118.38	120.55	124.43	131.29	123.59	120.94	87.77	114.01	119.30
Budget Rms	478	806	1,573	1,929	1,854	1,461	1,008	1,430	1,455	1,200	1,346	800	15,340
Budget Rev	62,634	111,054	185,575	214,911	201,104	173,968	129,172	185,970	191,345	162,470	165,055	95,570	1,878,828
Budget ADR	131.03	137.78	117.98	111.41	108.47	119.07	128.15	130.05	131.51	135.39	122.63	119.46	122.48
Variance Rms	-228	-476	-247	-1,028	-660	-909	-643	-1,207	-1,139	-976	-1,177	-690	-9,380
Variance Rev	-32,004	-58,872	-27,224	-121,168	-59,755	-107,422	-83,755	-156,692	-152,290	-135,379	-150,222	-83,029	-1,167,812
Variance ADR	-8.51	20.34	1.44	-7.37	9.91	1.48	-3.72	1.24	-7.92	-14.45	-34.86	-5.45	-3.18

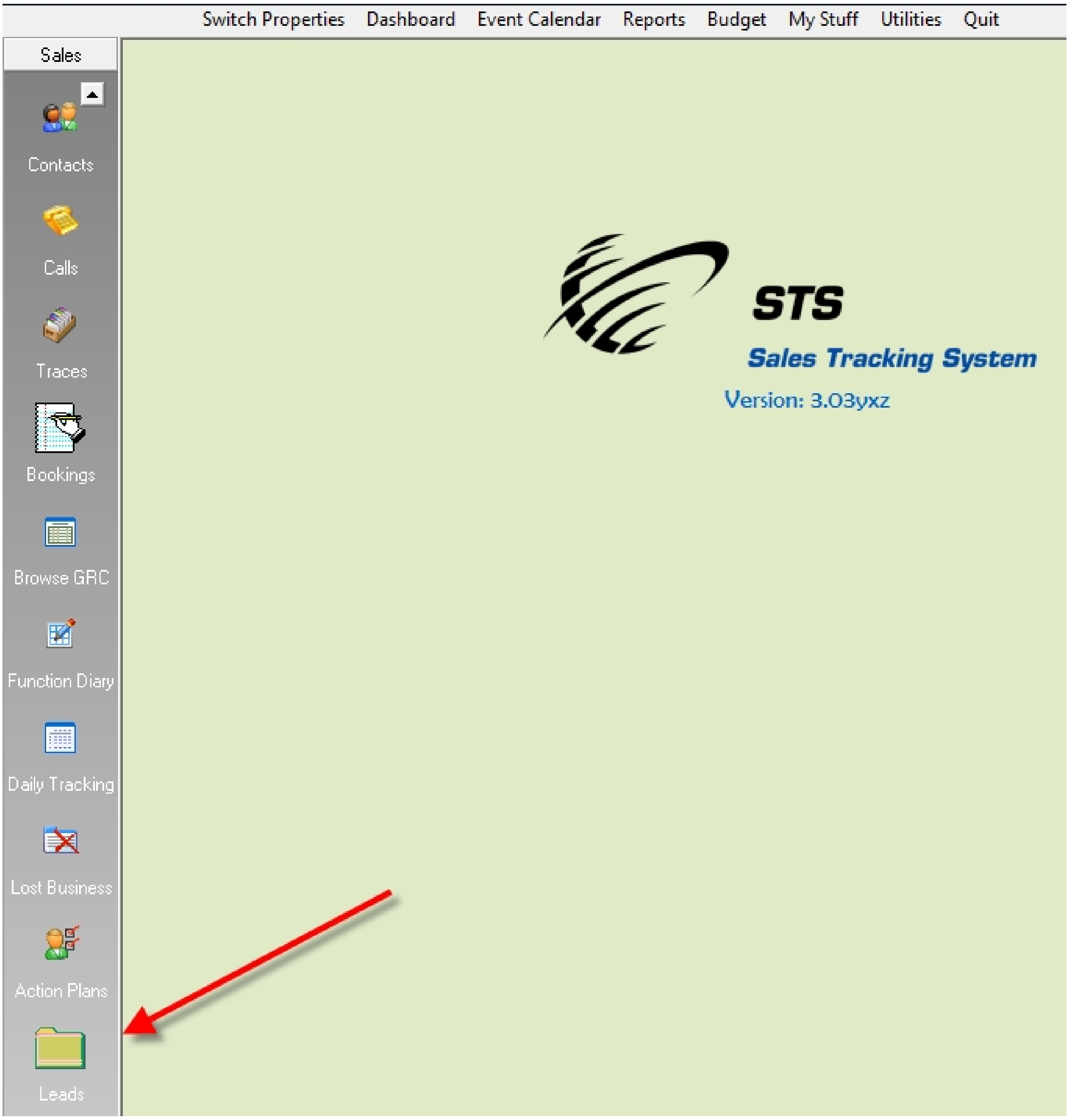
Note: Actual Pick Up used for dates prior to 03/05/2013

Lead Module

LEADS

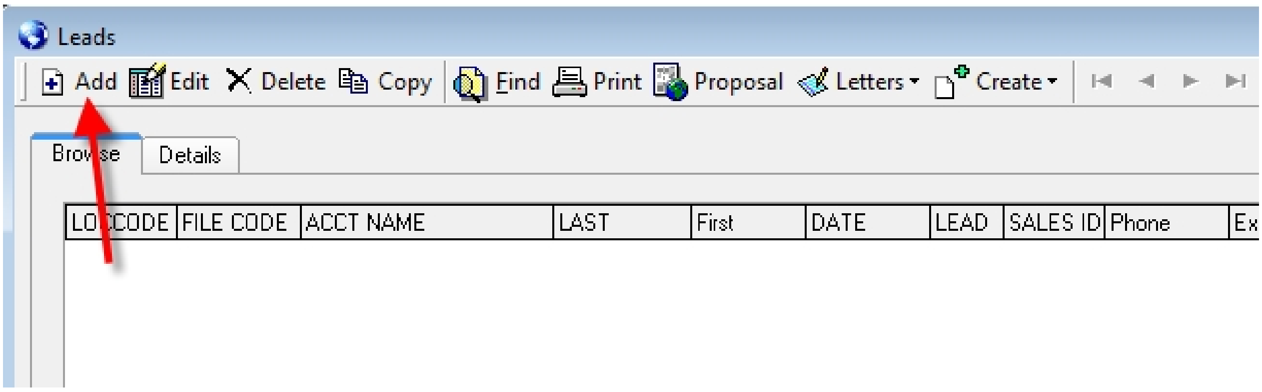
The Lead screen in STS allows users to enter and track potential business leads. The screen is laid out similar to the Sales Call screen but it captures some additional information related to the potential business.

To access the Leads screen locate and click the Leads icon on the bottom left menu.


Switch Properties
Dashboard
Event Calendar
Reports
Budget
My Stuff
Utilities
Quit
Sales
Contacts
Calls
Traces
Bookings
Browse GRC
Function Diary
Daily Tracking
Lost Business
Action Plans
Leads
STS
Sales Tracking System
Version: 3.03yxz

LEADS

When the Leads screen appears, click Add.



This screen functions very much like the Sales Call screen.

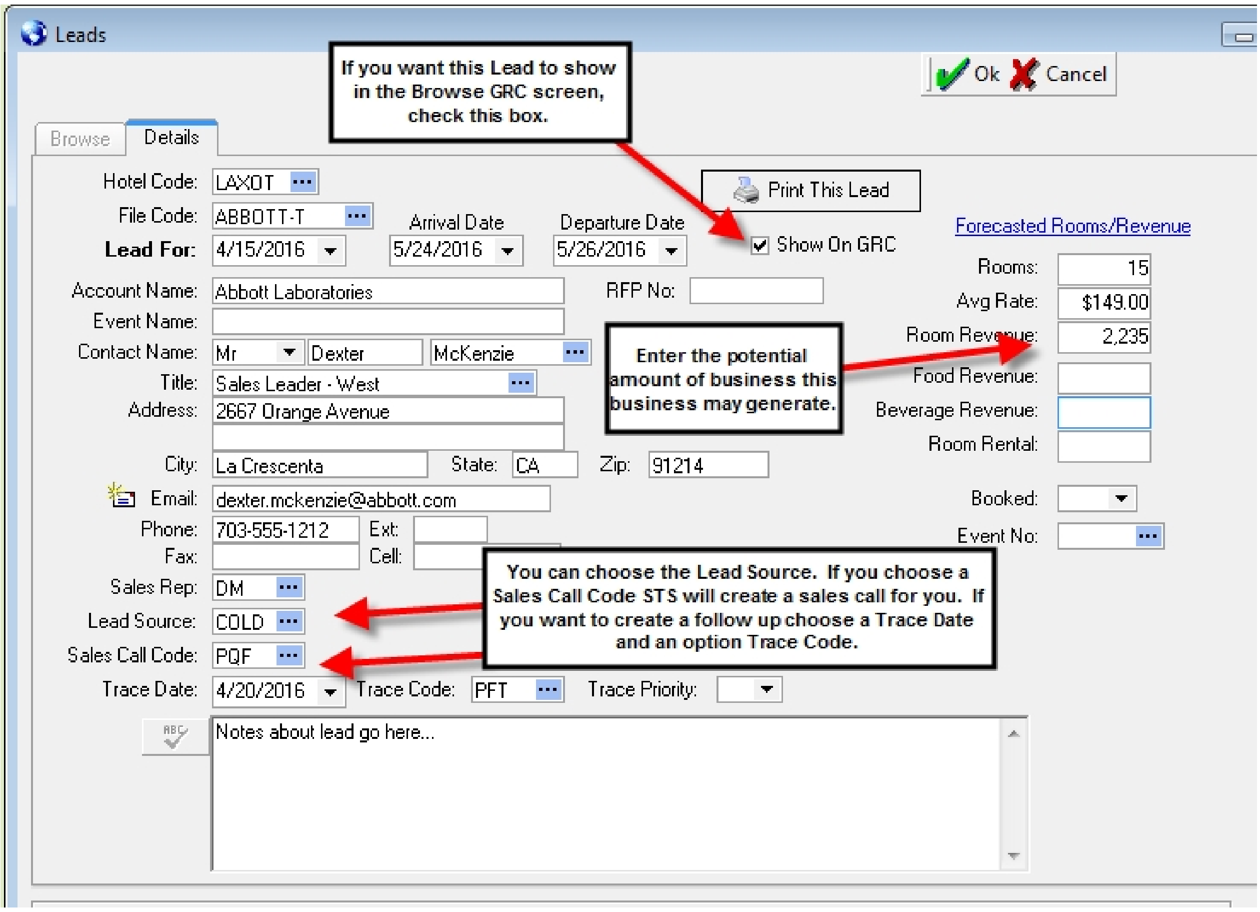
- You would choose an account to file the lead under. You can choose an actual account, if the Lead is for a company you have a profile for, or choose a prospecting account.
- Enter or choose the contact information.
- Choose dates for the Arrival / Departure dates of the potential business (if applicable)
- Choose a code for the Lead Source (where the business came from). If you don't see the applicable code, additional codes can be added under Utilities | Table Maintenance | Group Business / Call Lead Origin Codes
- You can choose an optional Sales Call code. If you do, a sales call (Activity) will be created for you and you will credit for the call.
- If you want to create a follow up reminder, choose a Trace Date and a Trace Code.
- Enter notes about the Lead.
- Finally, enter estimated rooms/revenue for this potential piece of business.
- If you want the Lead to show on the Browse GRC screen, check the Show On GRC box.
- Typically you would not choose an option for "Booked" or "Event No". These will be used later once you determine if you win/book the business.

- Click OK to Save.

LEADS

The Lead screen captures information about the lead including:

- Account/contact information
- Arrival / Departure Dates
- Potential rooms/revenue including potential
- Source of the Lead
- Notes about the Lead
- You can optionally create a sales call and/or a trace from this screen.

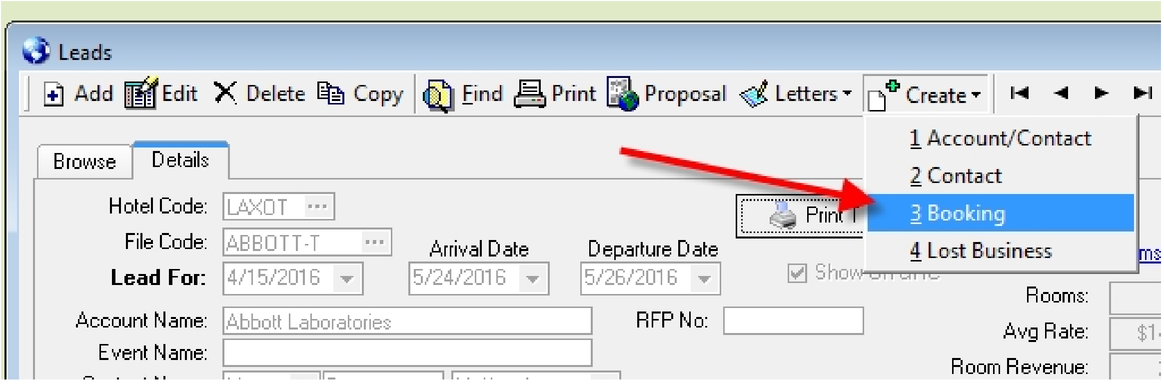


LEADS

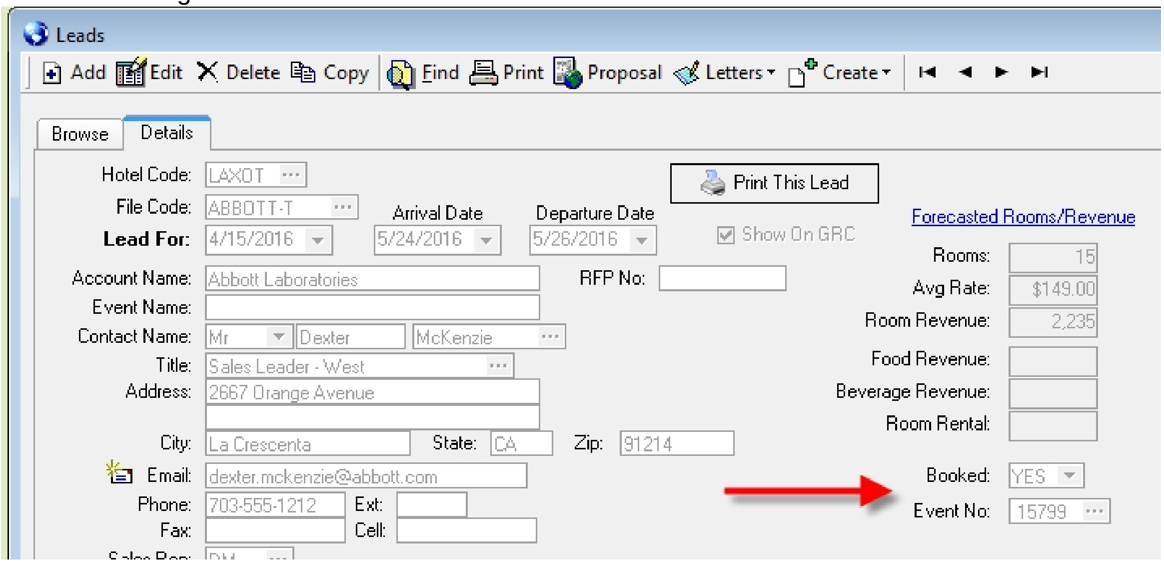
Once you determine if you have won/lost the business, you can return to the Lead screen and retrieve the Lead using the Find button.

If you Won the Business

- Click Create | Booking. You will taken to the booking screen where you can enter the booking.



-
-
- Once you create the booking, the Lead will be updated showing the Lead was booked and the Event # for the booking.



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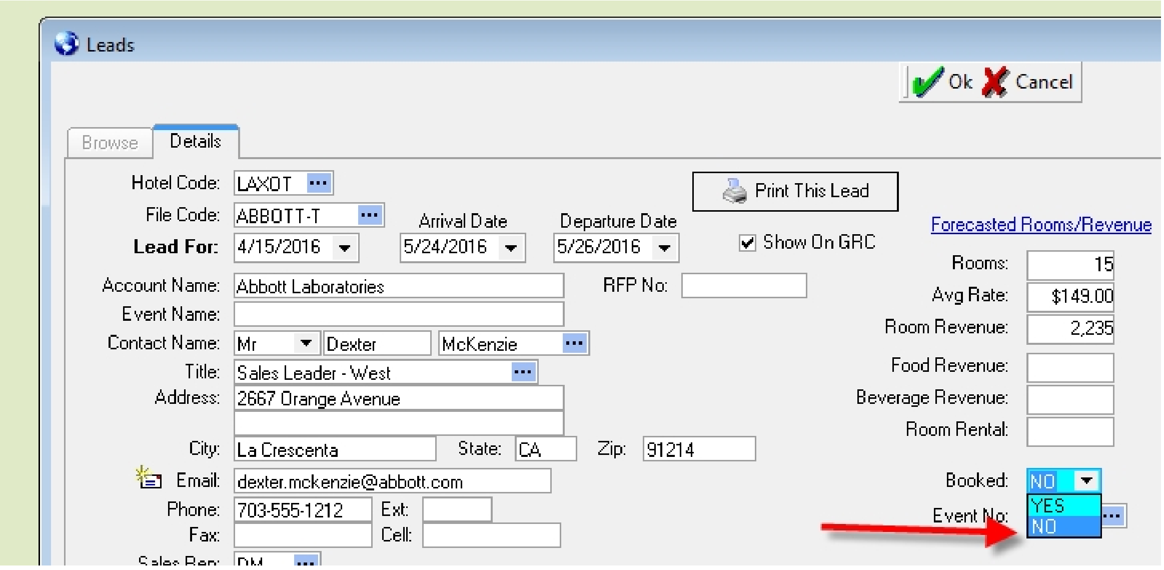
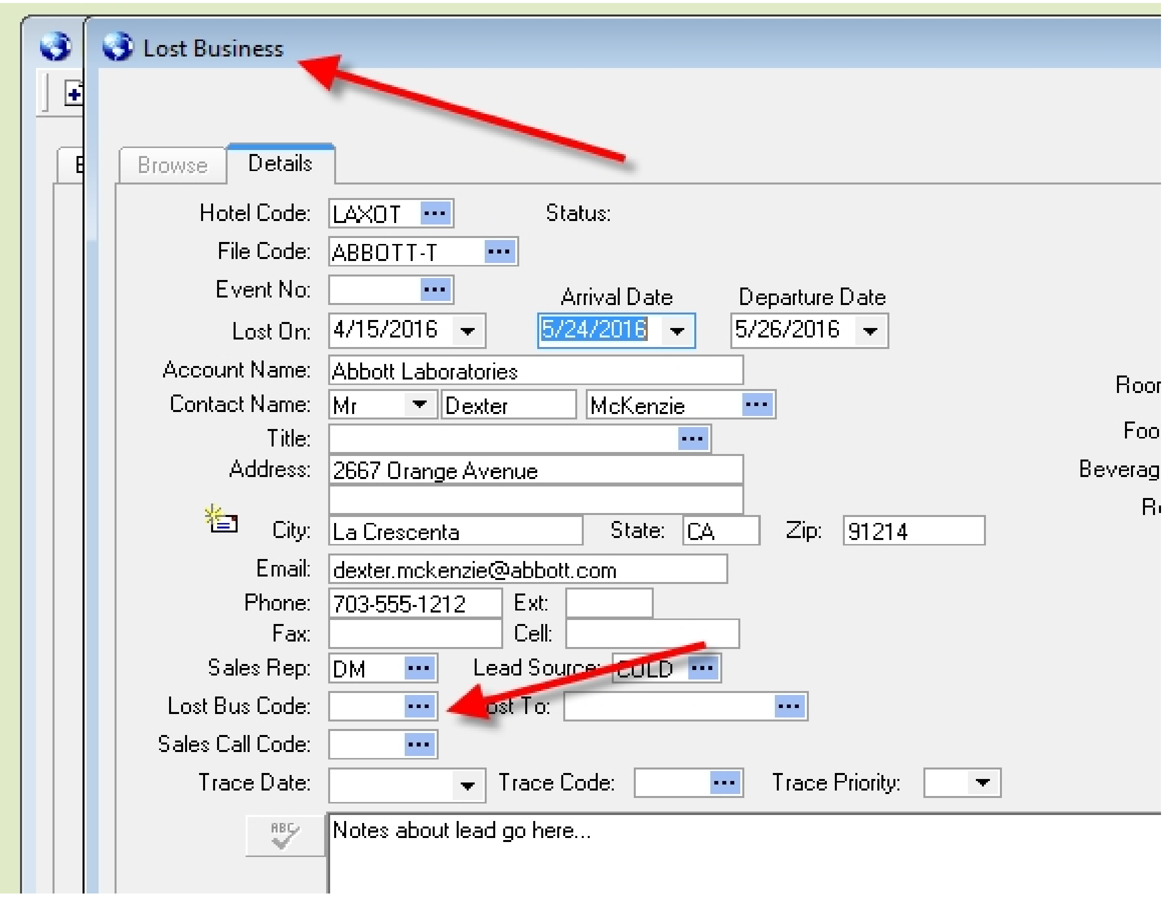
LEADS

If you DID NOT Win the Business

- Click Edit. Choose NO from the “Booked:” drop down.



-
-
- When you click OK to update the Lead you will be prompted if you want to create a Lost Business Entry. If you click Yes you will taken to a Lost Business screen where you can document why you did not win the business.



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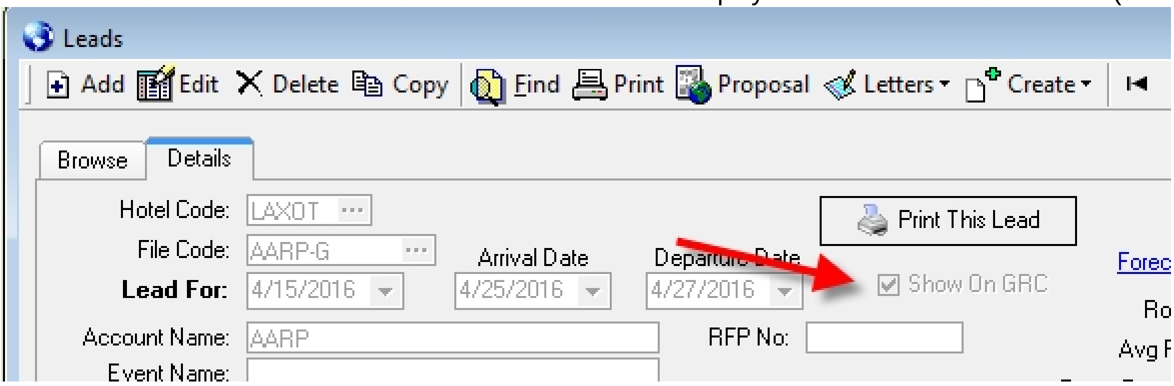
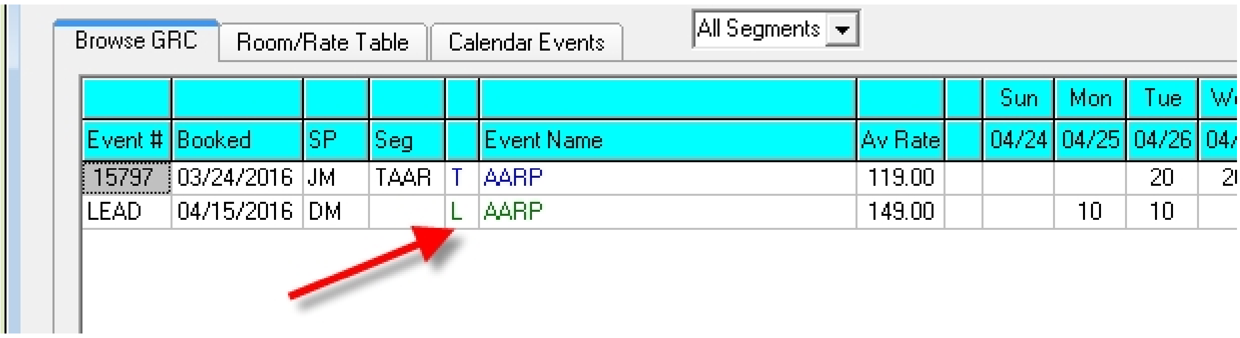
LEADS

Leads can also be displayed on the Browse GRC screen. Below are steps on how to display them on the GRC

1. Check the "Show Leads on Browse GRC Screen" check box. Click Utilities | Configure Hotel Info. Click the Program Config tab. Locate the "Show Leads On Browse GRC screen" and click it. Click OK to save. Exit STS and log back in

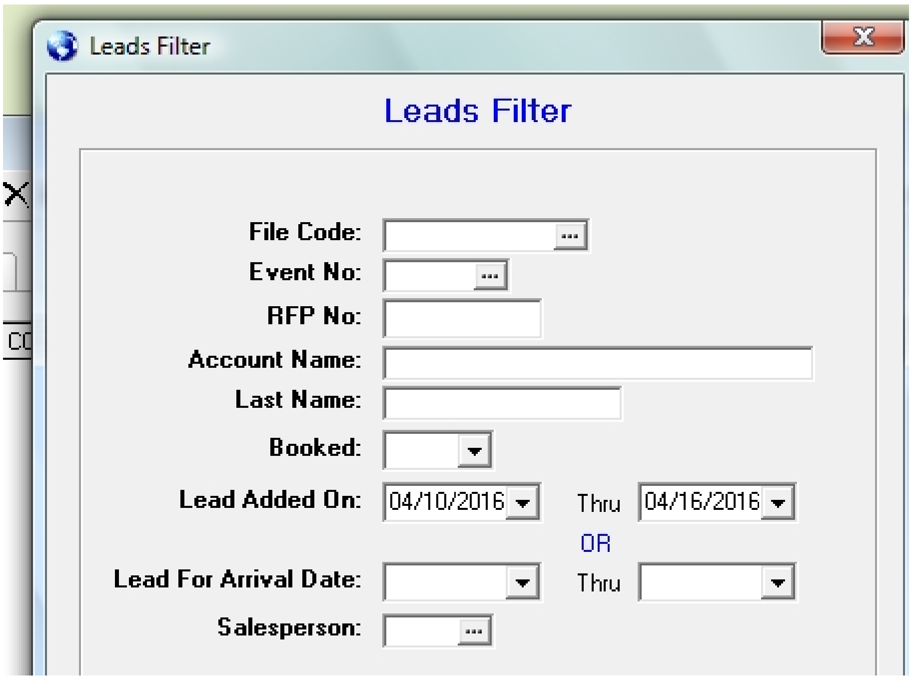
2. Then, when you have a lead you would like to display on the Browse GRC screen, click the "Show On GRC" box on the lead screen. The lead will be displayed in Green with a status of L (see below)

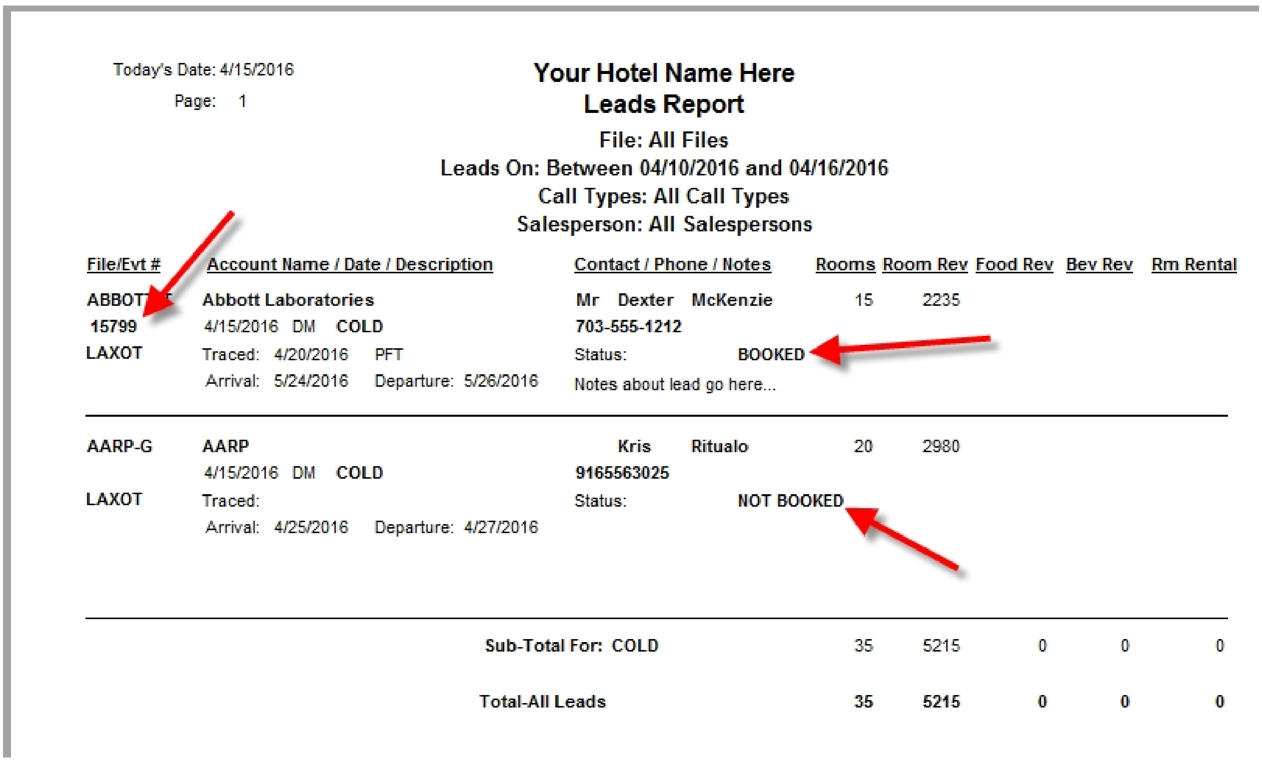




LEADS – Print Leads Report

You can Print a Leads report by clicking the Print button on the toolbar. Once the filter screen appears, set the desired filter. Leads that were booked will be noted with "BOOKED" for the status. Leads that were not booked will be note with "NOT BOOKED" for the status.





Eblast Feature

STS – Eblast

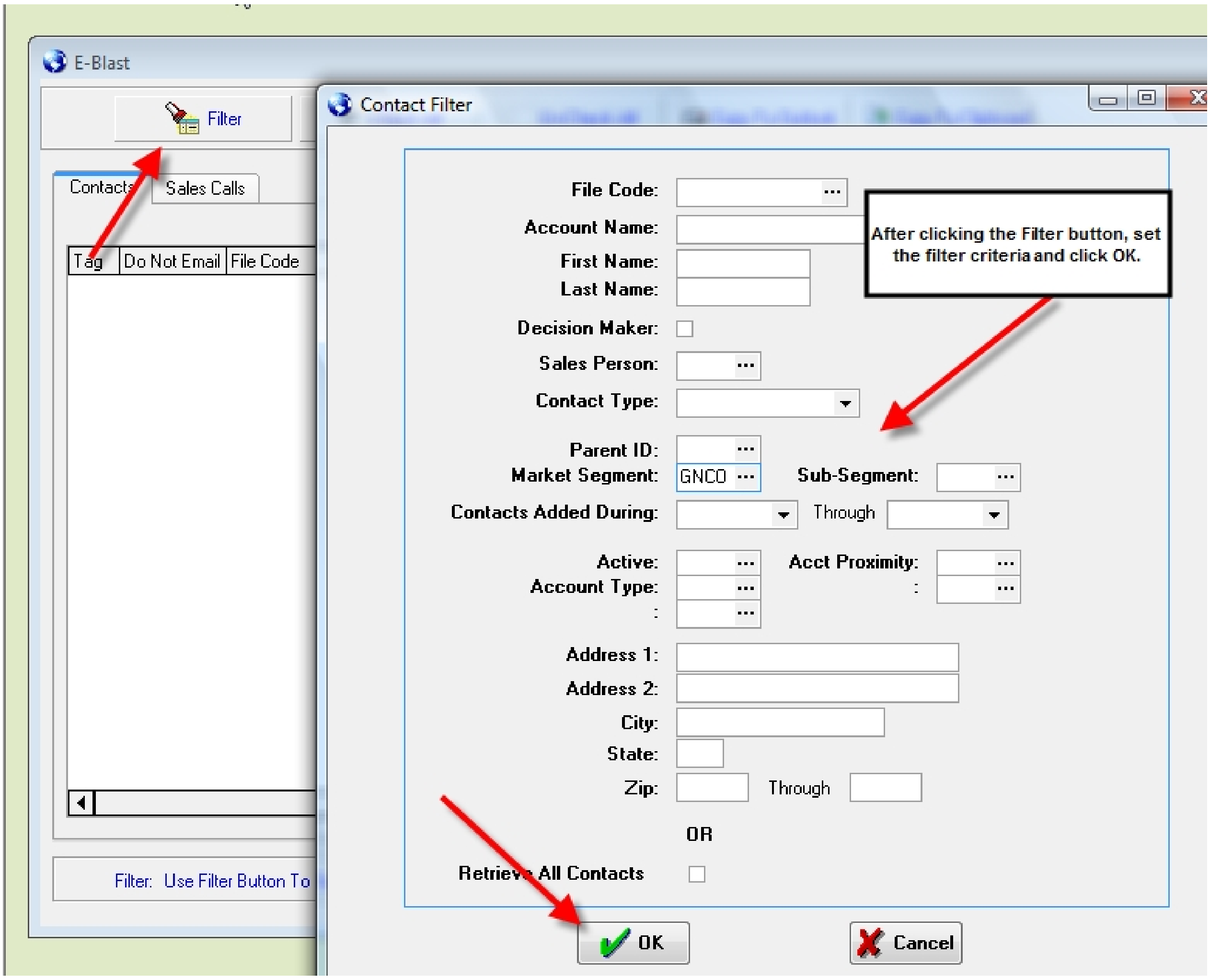
Below are the steps for generating an Eblast from STS from the **Contacts** database. To retrieve all contacts, click the "Retrieve All Contacts" box on the bottom of the filter screen. **You can also export the contacts to Excel with just a few clicks**. Just right click over the grid, once you have retrieved the contacts and choose Export To Excel. Included are steps (see the screen shots below) on how to correct an erroneous email address if one is found.

The one area that can cause issues are invalid email addresses. I have addressed it below but if you are trying to export directly to Outlook, and you have an invalid email address (e.g. mball@IBM) Outlook will stop the process and display the offending email address. It will need to be excluded or fixed before proceeding.

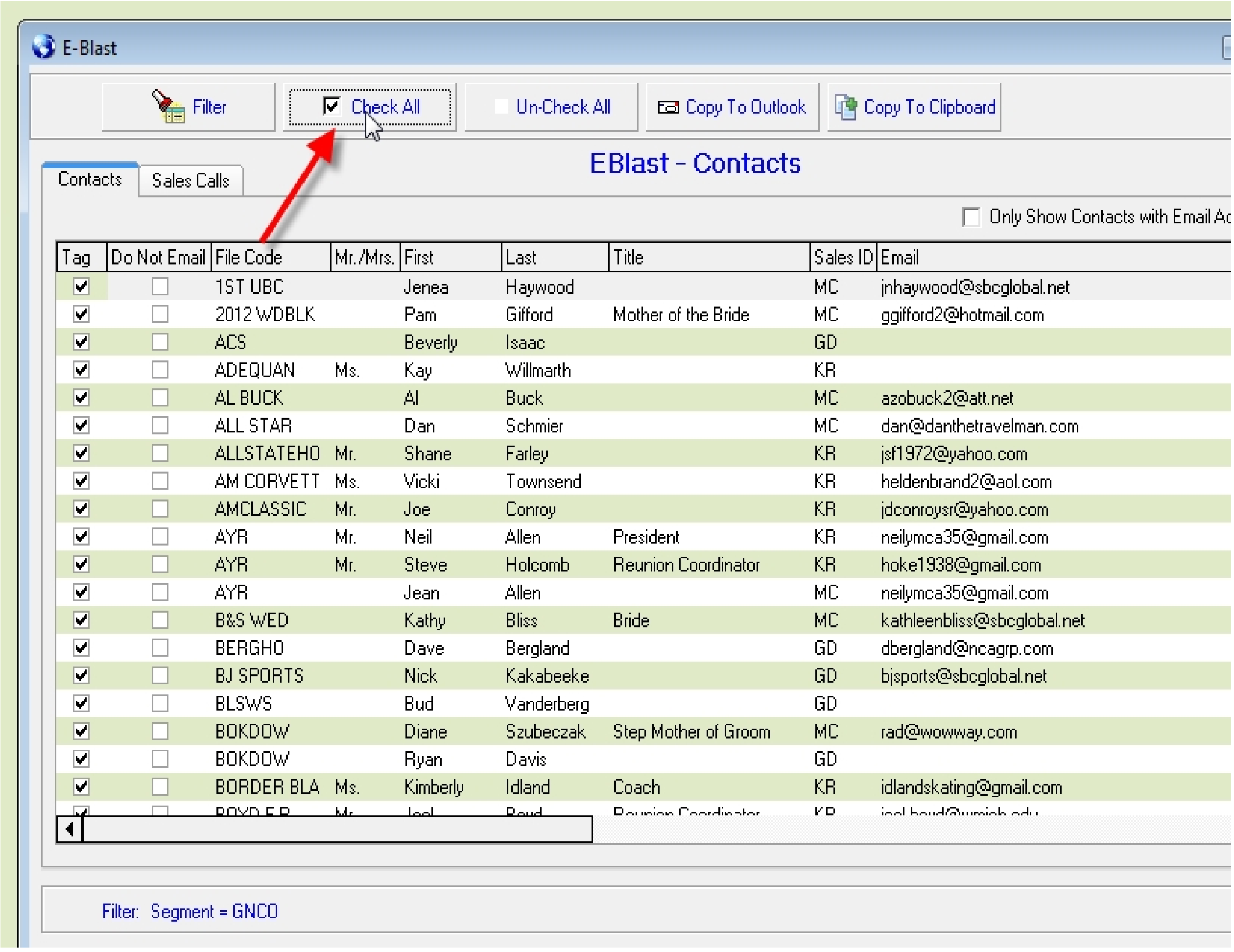
1. Click Reports | Email Blast.
2. Click the Filter button to set the filter to retrieve the contacts that match the scope of your email campaign. The example below filters for all CORP contacts.
3. Once the contacts appear, click the Check ALL button. STS will put a check mark by all contacts name who do not have a check mark in the "Do Not Email" column.
4. Finally, you can click Copy To Outlook to have the checked email addresses inserted into the BCC field in Outlook, or, you can click Copy To Clipboard. If you choose Copy To Clipboard, STS will copy the email addresses to the Windows clipboard. You can then "Paste" the email addresses into another email program (like a web based email program) if you are not using Outlook. If any email addresses, in the filter, are not correct they will be displayed one at a time. You would locate the contact (in Contacts) to correct the email address and try the eblast again.

5. **Finally, if you want to Export the contact list to Excel, you can right click over any row in the grid and choose Export Contacts To Excel. You will find the export file in the C:\STSR\Export folder. The file name will be EBlastContacts.xls**.

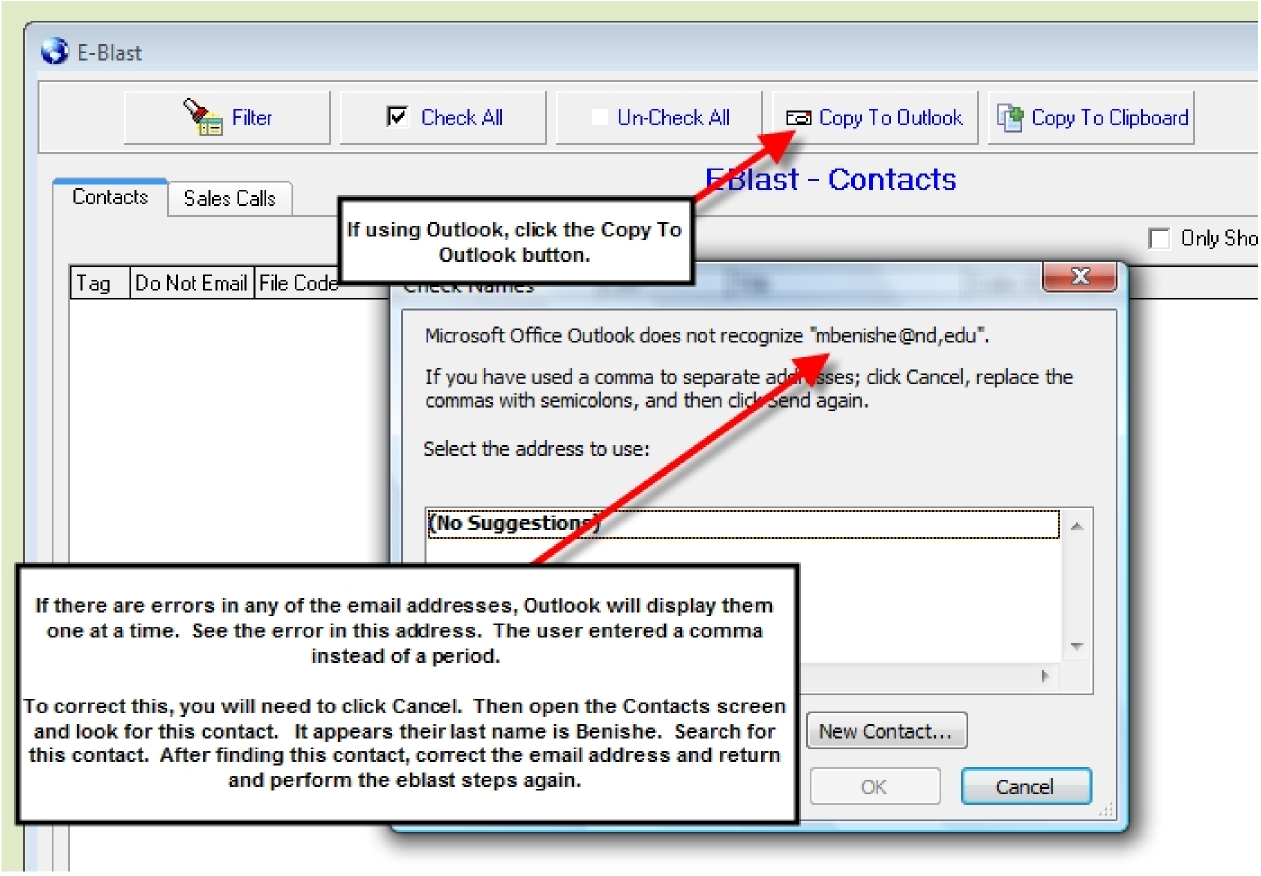
Click the Filter button and set the filter for the contacts you want to include in the Eblast.



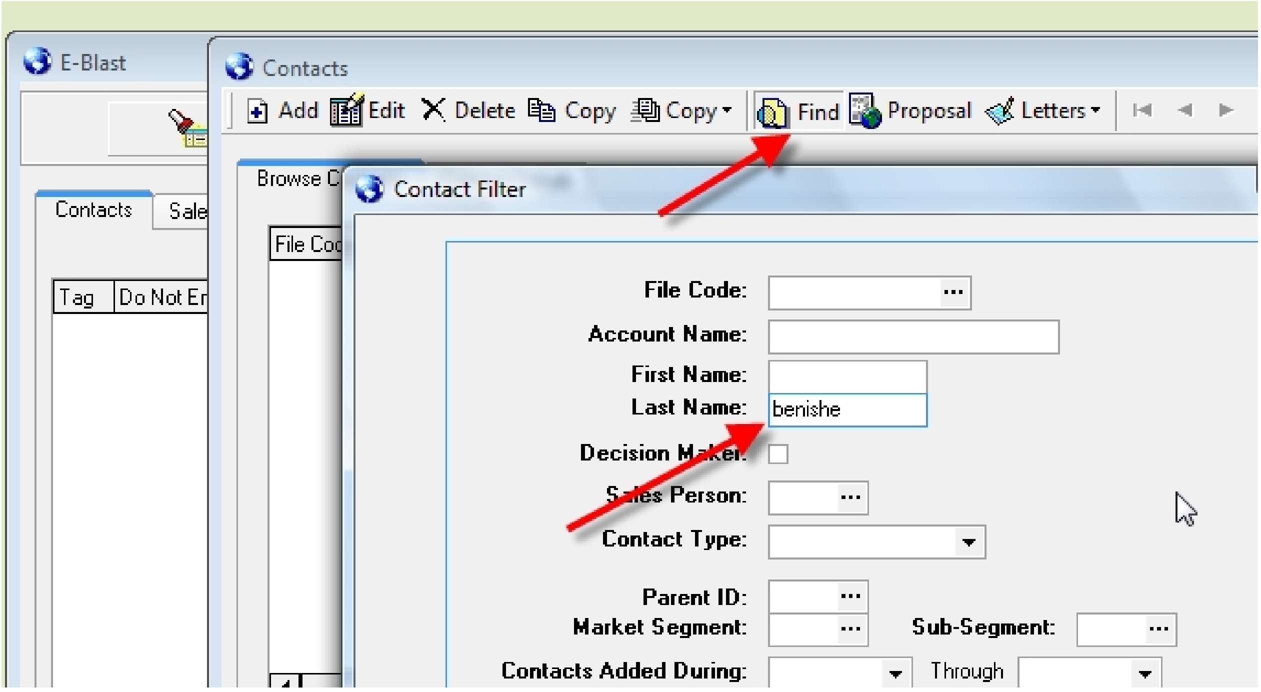
Click “Check All” to include all contacts. You can uncheck any contacts you do not want to include.

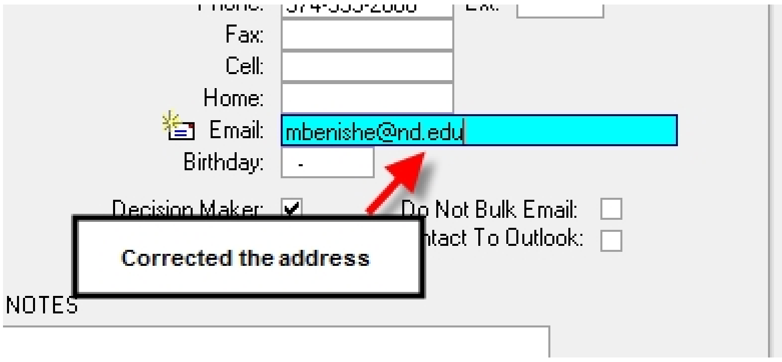


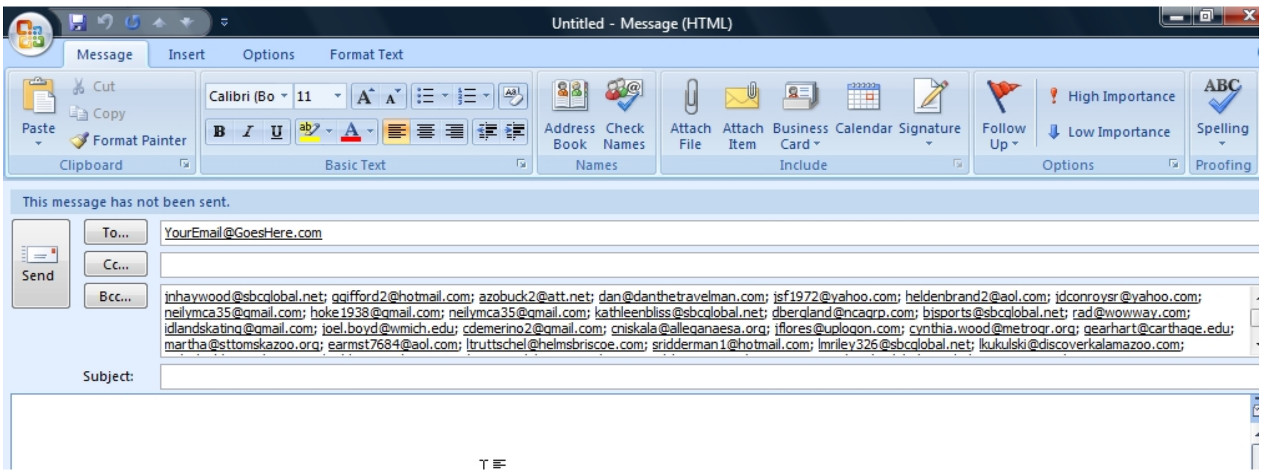
Click the “Copy To Outlook” button to export the email addresses to Outlook. If you are using an email program other than Outlook (like Gmail) you use the “Copy To Clipboard” button. That will copy the selected email addressed to the Windows clipboard. You can then Paste the email addresses in the email programs BCC field.



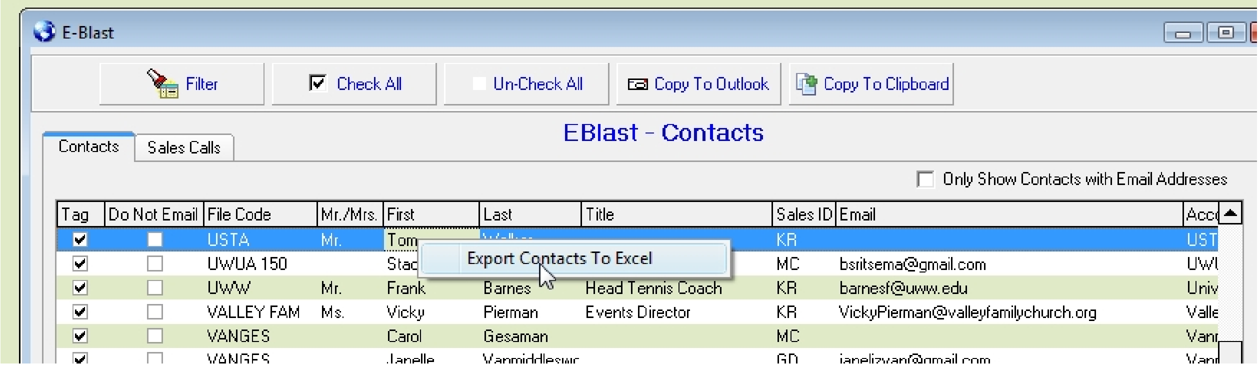
If there were errors in one of the contacts email addresses, you can find the contact and correct it. Once corrected you can export the contacts again.







If you want to export the contacts to Excel, right click over the grid and choose “Export Contacts To Excel”.

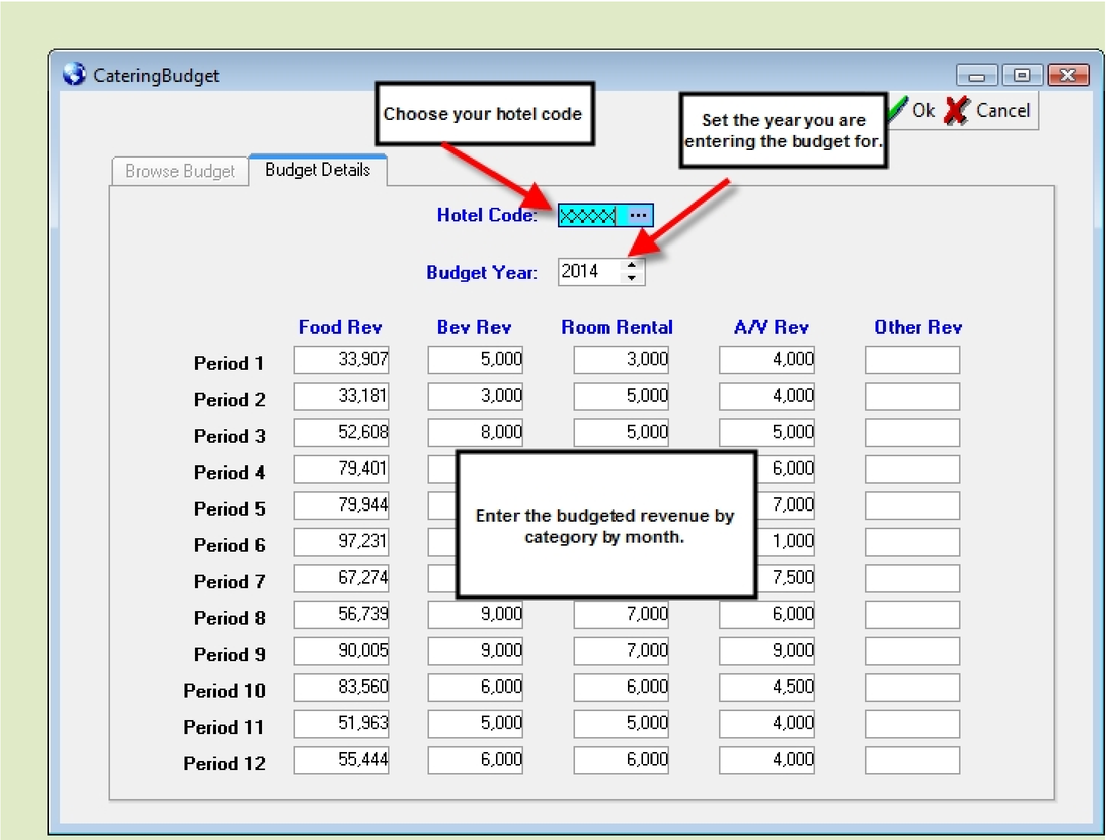


Catering Budget Data Entry

Loading Catering Budget

Several key reports in STS allow you to compare forecasted/actual catering revenue versus your budget. Below are the steps for loading your catering revenue.

1. Start STS.
2. Click Budget | Add/Edit. Enter the year you are entering your budget for (e.g. 2014).
3. Enter/choose your hotel code (5 letter/number code).
4. Enter your budgeted revenue by category by month.
5. Enter the numbers for all 12 months (periods). Click OK to save.



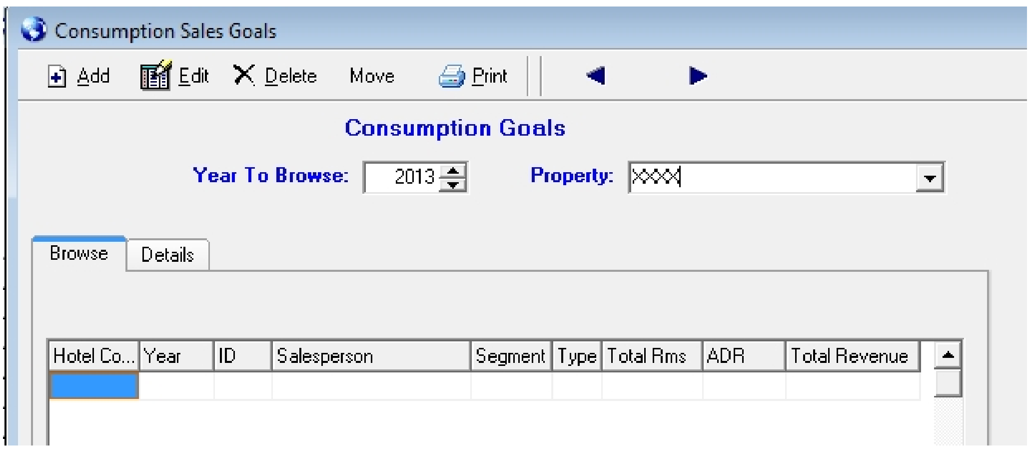
Consumption Goals Data Entry

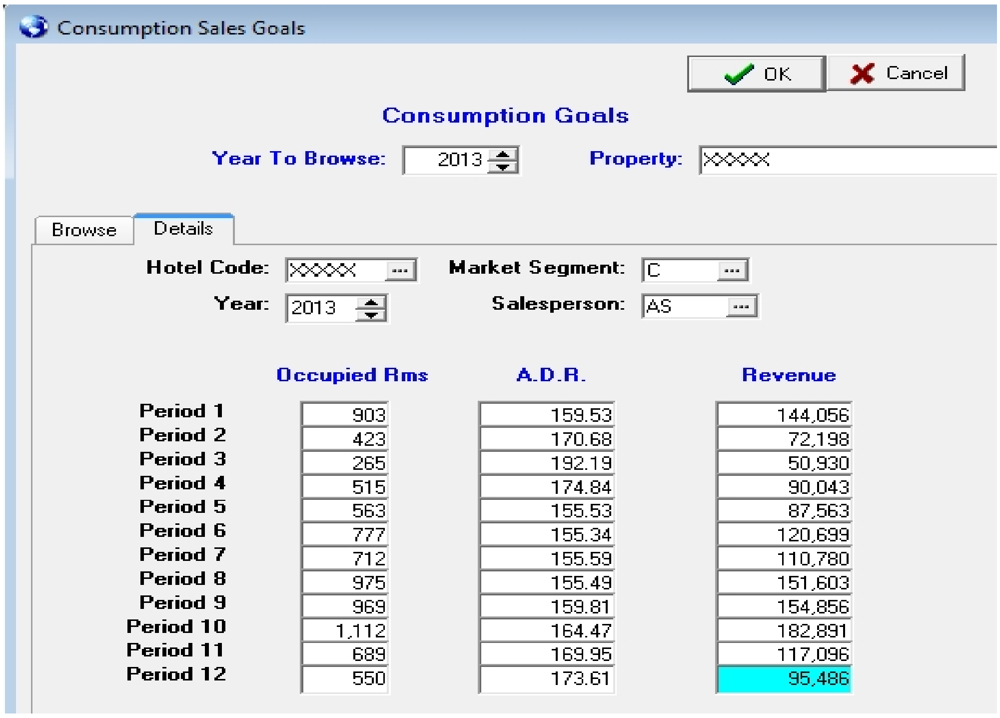
Loading Group Consumption Goals

Consumption Sales Goals

Consumption sales goals are based on group actuals.

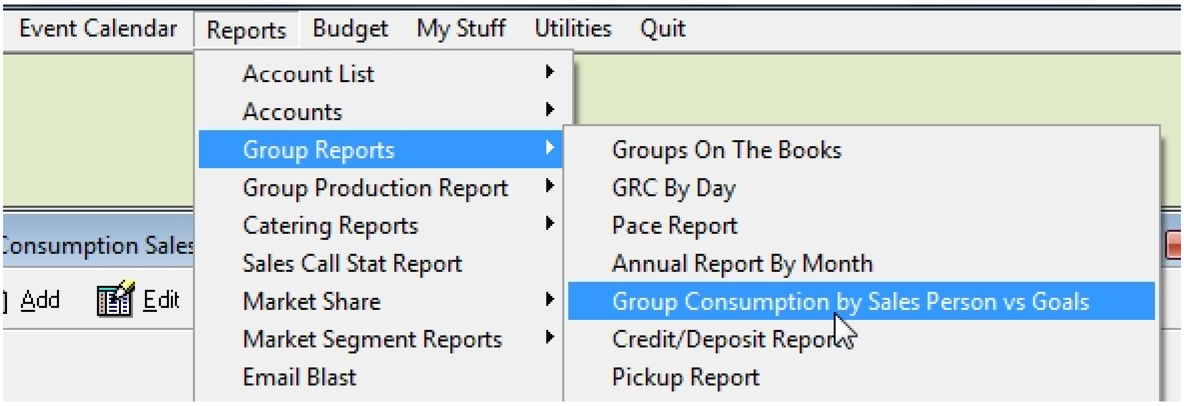
1. Click Budget | Room Consumption Goals.
2. Set the Year you want to enter goals for.
3. To add a goal, click the Add button. Fill in the fields.
4. Click OK to save. You can repeat the process to load goals for as many segments as needed.





If you have multiple goals by segment, you can add multiple goals. One for each segment you are budgeted for. If you have only one goal, enter your goal under any group segment.

The Consumption Goals print on the “Group Consumption by Sales Person vs Goals” report. STS will add up all goals entered for each sales person and print on “Goal” line on the report (see below).



When you run the report, dates earlier than the date you are running the report on will pull from group actuals. Today and dates until the end of the year will pull from Net blocked.

Segment: All Segments
Sales Person: All Salespersons

Group Blocked/Actuals By Sales Person vs Goals
Net Rooms - Definite, Tentative and Prospect

Sales Person			Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Annual Total
Groups	Blocked	Rooms	194	86	1,109	898	869	526	305	193	316	198	169	110	4,973
		ADR	115.25	106.14	112.16	104.04	101.29	118.16	117.63	126.05	123.59	113.32	87.77	114.01	110.30
		Revenue	22,359	9,128	124,382	93,426	88,024	62,152	35,877	24,328	39,055	22,437	14,833	12,541	548,542
	Actual	Rooms	205	99	1,111	381	132	21	25	6	29	6	0	0	2,015
		ADR	113.93	106.75	108.08	103.07	115.97	119.00	106.60	119.00	119.00	119.00	0.00	0.00	108.50
		Revenue	23,355	10,568	120,079	39,270	15,308	2,499	2,665	714	3,451	714	0	0	218,623
		Pick Up %	105.7%	115.1%	100.2%	42.4%	15.2%	4.0%	8.2%	3.1%	9.2%	3.0%	0.0%	0.0%	40.5%
	Goal	Rooms	203	123	265	515	563	777	712	975	969	1,112	689	550	7,453
		ADR	159.53	170.68	192.19	174.84	155.53	155.34	155.59	155.49	159.81	164.47	169.95	173.61	163.07
		Revenue	32,385	20,994	50,930	90,043	87,563	120,699	110,780	151,603	154,856	182,891	117,096	95,486	1,215,324
Variance - Blocked vs Goals		Rooms	-9	-37	844	383	306	-251	-407	-782	-653	-914	-520	-440	-2,480
		ADR	-44.28	-64.54	-80.03	-70.80	-54.24	-37.18	-37.96	-29.44	-36.22	-51.15	-82.18	-59.60	-52.76
		Revenue	-10,026	-11,866	73,452	3,383	461	-58,547	-74,903	-127,275	-115,801	-160,454	-102,263	-82,945	-666,782
Variance - Actual vs Goals		Rooms	2	-24	846	-134	-431	-756	-687	-969	-940	-1,106	-689	-550	-5,438
		ADR	-45.60	-63.93	81.74	-71.77	-39.56	-36.34	-48.99	-36.49	-40.81	-45.47	-169.95	-173.61	-54.98
		Revenue	-9,030	-10,426	69,149	-50,773	-72,255	-118,200	-108,115	-150,889	-151,405	-182,177	-117,096	-95,486	-996,701
Transient	Actual	Rooms	0	0	0	0	0	0	0	0	0	0	0	0	0
		ADR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Hotel Budget Data Entry

Loading Hotel Budget

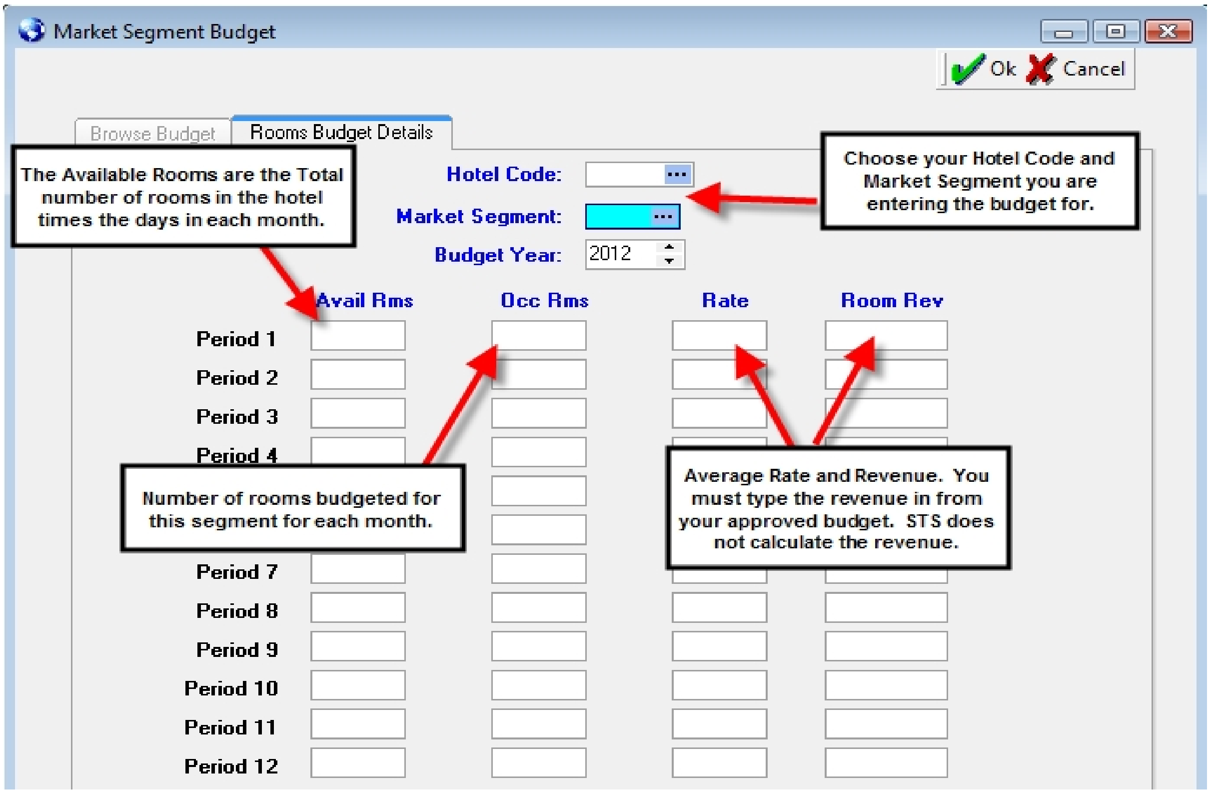
Several key reports in STS allow you to compare business booked versus your budget. You must enter your budget, by market segment, before the budget numbers will appear on these reports. Below are the steps for loading your budget by market segment.

1. Start STS.
2. Click Budget | Add/Edit. Enter the year you are entering your budget for (e.g. 2012) and click OK.
3. Click Add. Enter/choose your hotel code (5 letter/number code).
4. Click the Look Up button to the right of the Market Segment field and choose the segment you would like to enter your budget for.
5. Enter the requested numbers for each month. The **Avail Rms** are the **total** available rooms in the hotel each month. The remaining numbers (Occ Rms, Rate and Rooms Rev) should be keyed in from your approved budget. STS does

not calculate any of these numbers.

6. Enter the numbers for all 12 months (periods). Click OK to save.
7. Repeat steps 3 through 6 for each segment you would like to enter budget numbers for. The **Avail Rms** field will always be the total available rooms in the hotel each month.

It is important to load the transient and group budgets under their respective segments as the group budget numbers will appear on the key group reports such as the Annual Report by Month and the Pace Report.



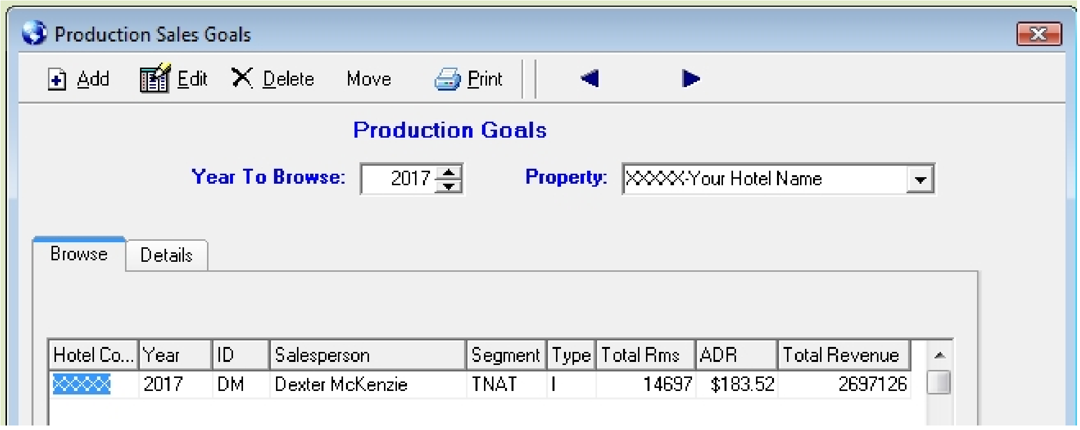
Production Goals Data Entry

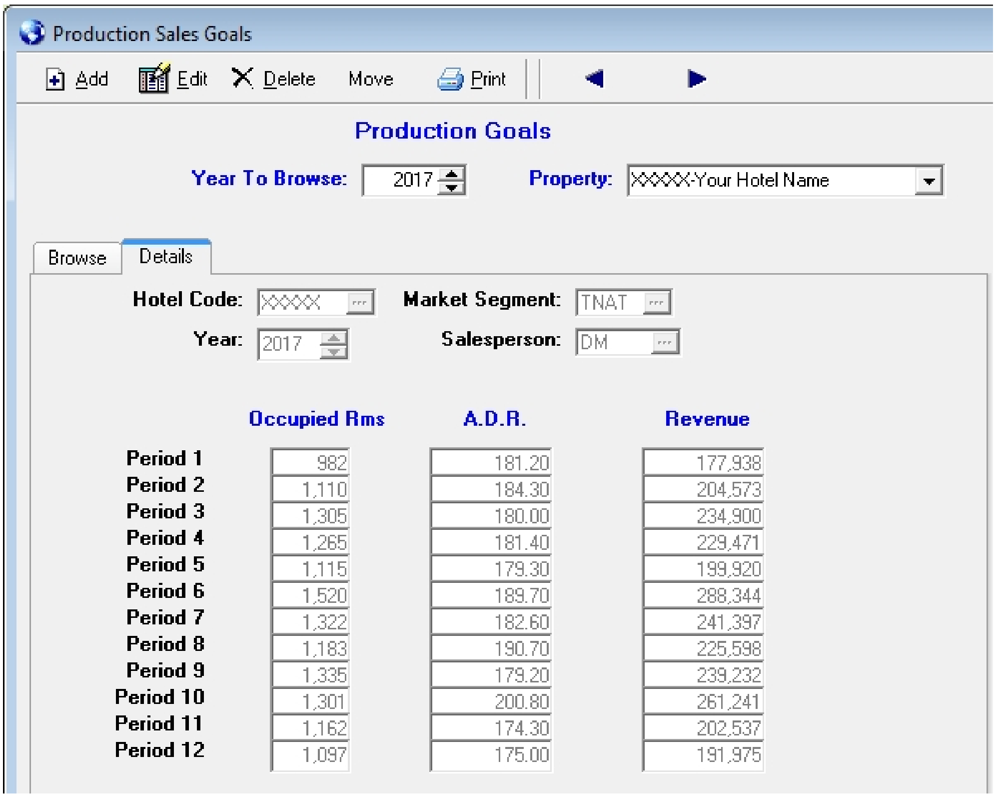
Loading Group Production Goals

Production Sales Goals

Production sales goals are based on booking activity. Production goals are based on how much business a sales person books during a period of time for the future.

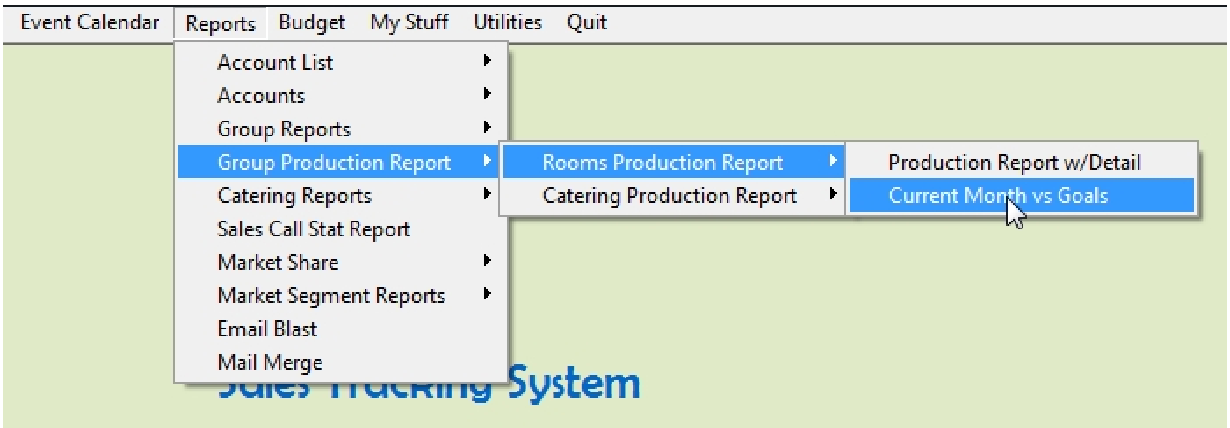
1. Click Budget | Room Production Goals.
2. Set the Year you want to enter goals for.
3. To add a goal, click the Add button. Fill in the fields.
4. Click OK to save. You can repeat the process to load goals for as many segments as needed.



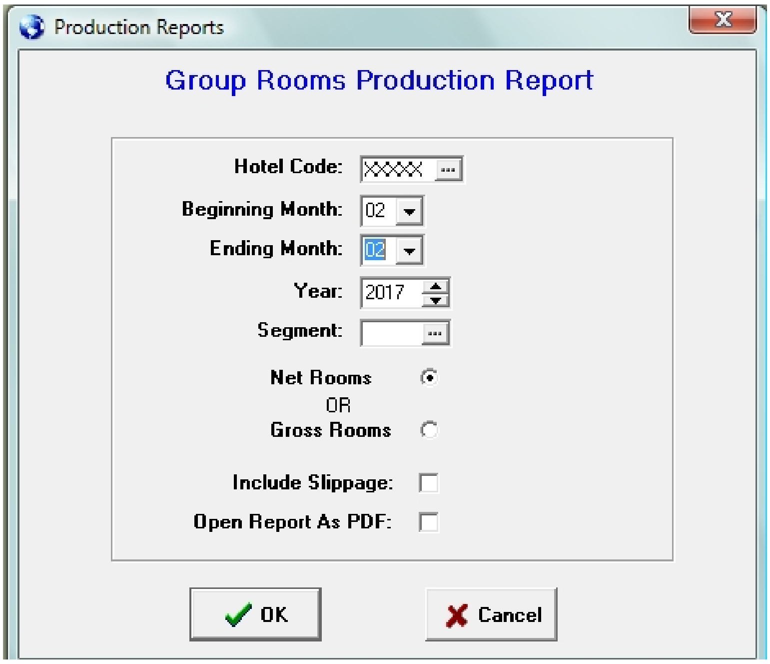


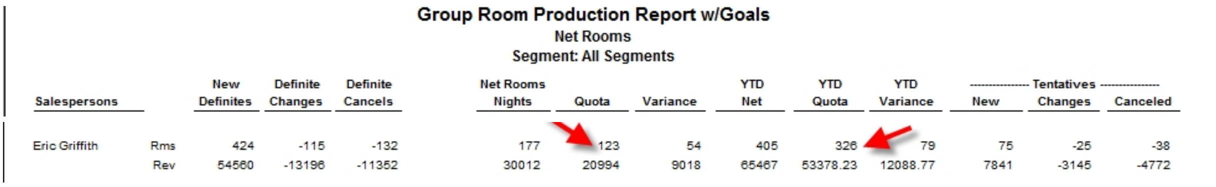
If you have multiple goals by segment, you can add multiple goals. One for each segment you are budgeted for. If you have only one goal, enter your goal under any group segment.

The Production Goals print on the "Group Room Production Report w/Goals" report. STS will add up all goals entered for each sales person and print in the "Quota" and "YTD Quota" columns (see below).



The "Group Room Production Report w/Goals" will print the group production, by sales person, for the month specified. It will also print any group production goals entered by sales person.





Group Room Production Report w/Goals
Net Rooms
Segment: All Segments

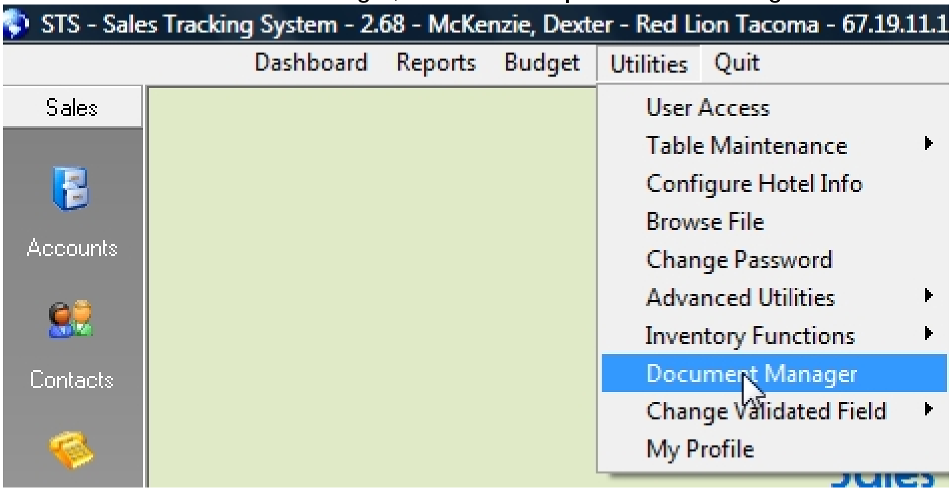
Salespersons		New Definites	Definite Changes	Definite Cancels	Net Rooms Nights	Quota	Variance	YTD Net	YTD Quota	YTD Variance	Tentatives New	Tentatives Changes	Tentatives Canceled
Eric Griffith	Rms	424	-115	-132	177	123	54	405	326	79	75	-25	-38
	Rev	54560	-13196	-11352	30012	20994	9018	65467	53378.23	12088.77	7841	-3145	-4772

Document Manager

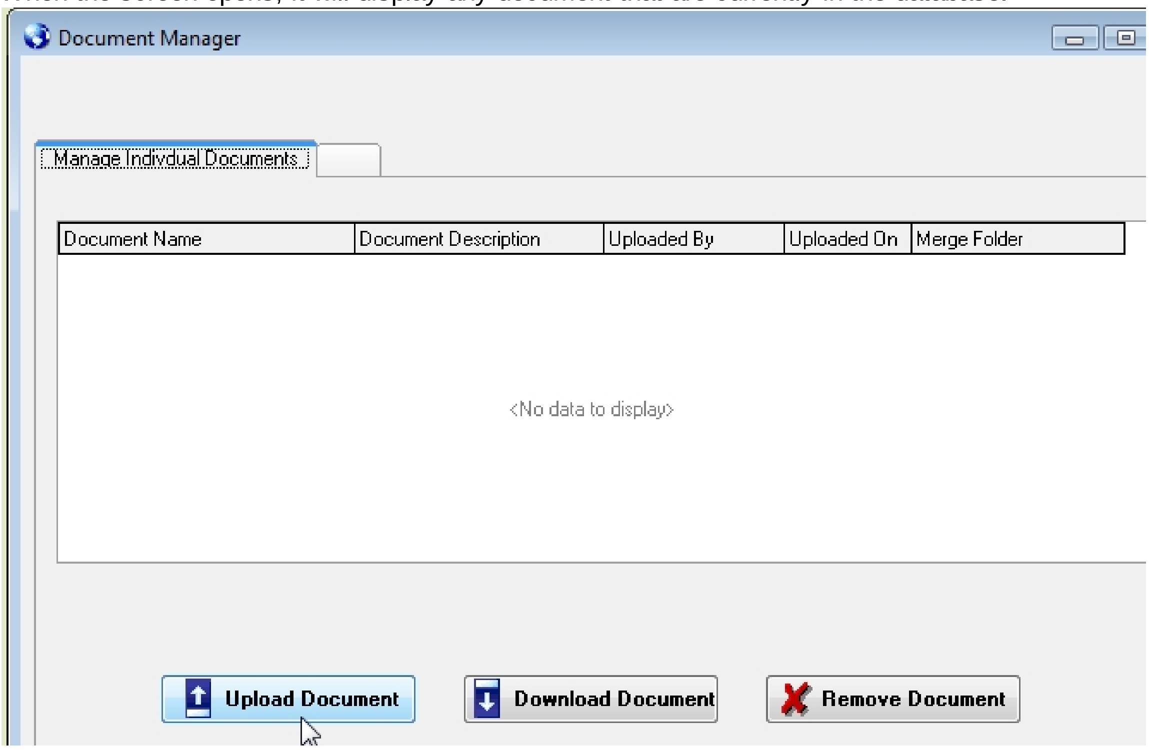
STSR – Document Manager

The Document Manager in STS allows you to upload Word documents and store them in the online database. The advantages are you can store copies of your contract templates and letters allowing other users to easily download them to their computer. This function was designed for storing copies of your contract/letter merge templates in the STS database. It also is helpful if you have to reload STS on your computer and want to download your merge templates back to your local computer. Below find the steps for uploading/downloading documents to/from the Document Manager.

Accessing the Document Manager
To access the document manager, click Utilities | Document Manager.

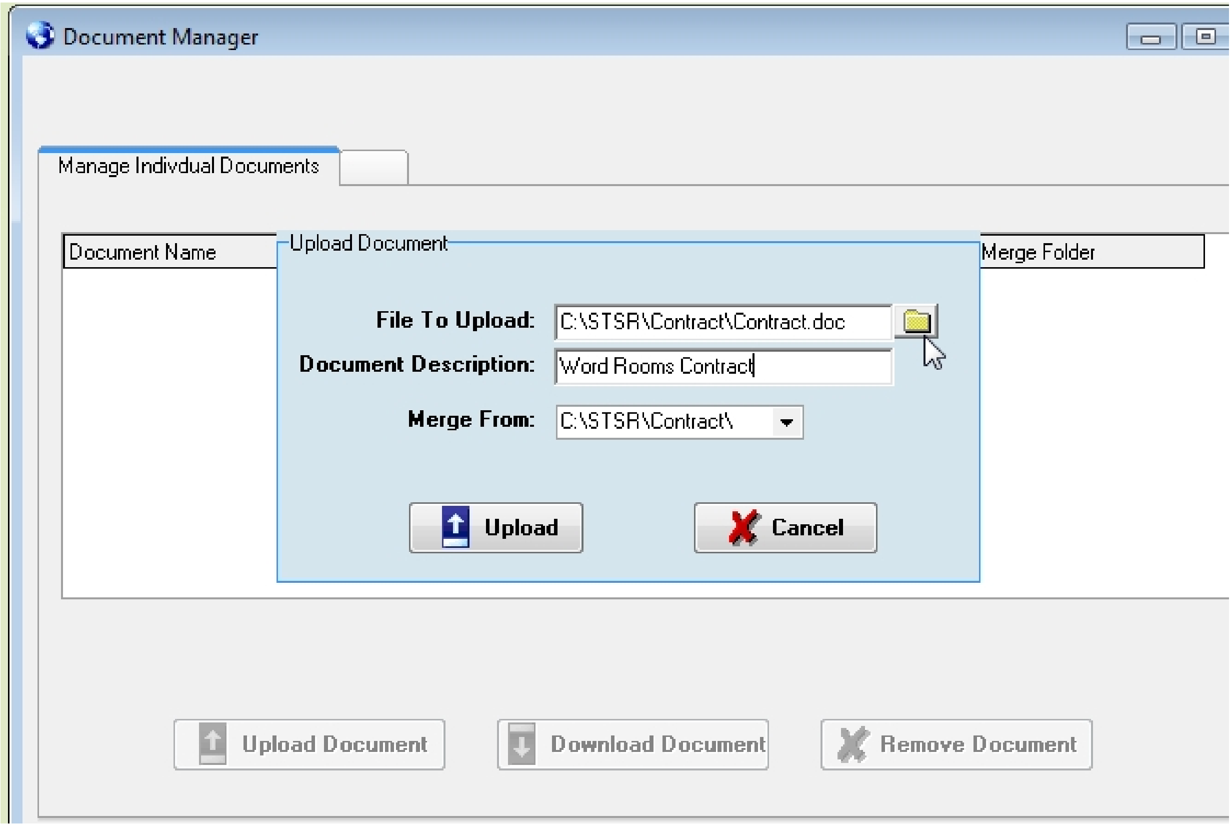


When the screen opens, it will display any document that are currently in the database.

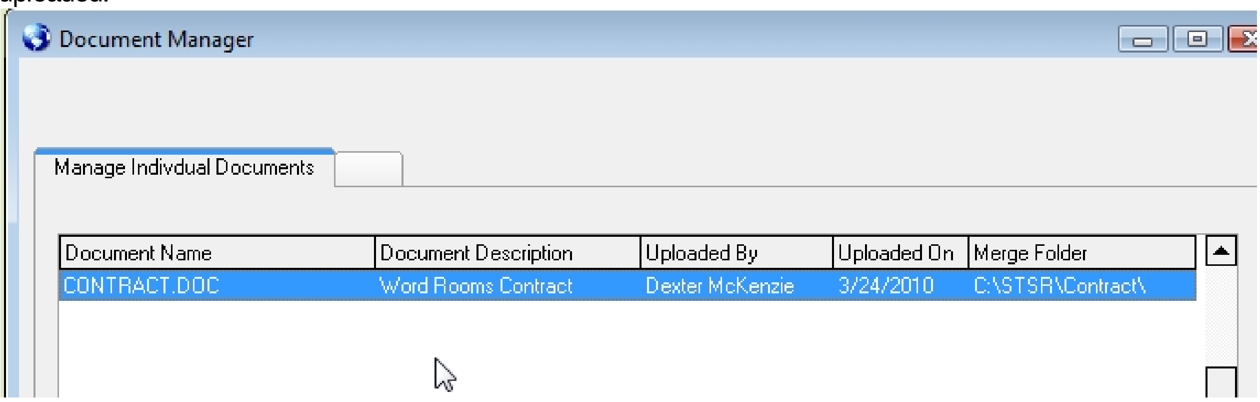


STSR – Document Manager

Uploading Documents
The **Upload Document** button allows you to upload any documents and store them in the database. To begin the process, click the Upload Document button. The Upload Document window will appear. You can click the folder icon to the right of the File To Upload line to find the document you would like to upload. Once you locate the document, and double click on it, the document will appear in the first field. Enter a Description for the document and click Upload.



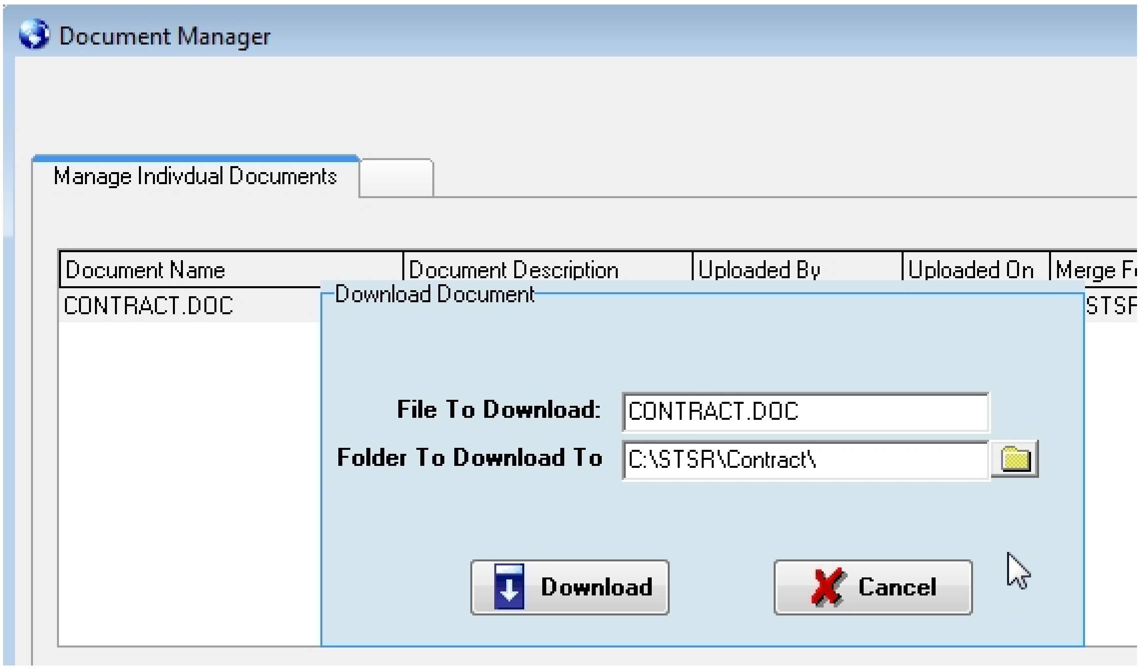
After the document is uploaded, you will receive a “Document Uploaded” message. Click OK. You should see the document in the list. This means a copy of that document is stored in the STS database and is accessible by anyone who can log into STS. It also show who uploaded the document and the date it was uploaded.



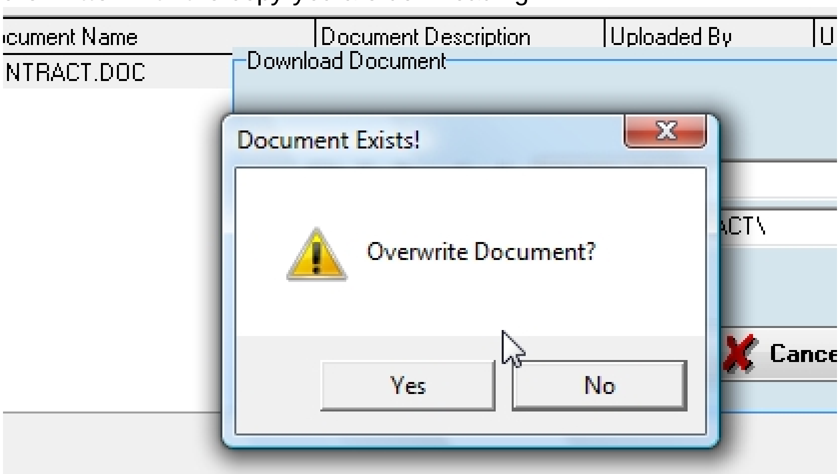
STSR – Document Manager

Downloading Documents

The **Download Document** button allows you to download any documents to your local computer or any location on your network. To begin the process, click the Download Document button. The Download Document window will appear. The Document Name and the default folder to download to, will be displayed. You can change the "Folder To Download To" by clicking the folder to the right of the line. Choose the new folder you want to download the template to. This location should be the same location where you store your contract merge templates. Most time you would not need to change the path in the "Folder to Download To" line.



If the document exists you may get a "Overwrite Document" message. If you click Yes the document will be overwritten with the copy you are downloading.



Once the document is downloaded you will get a "Document Restored" message.

You can also remove documents from the database by highlighting a document and clicking the Remove Document button.

Proposal Path Interface

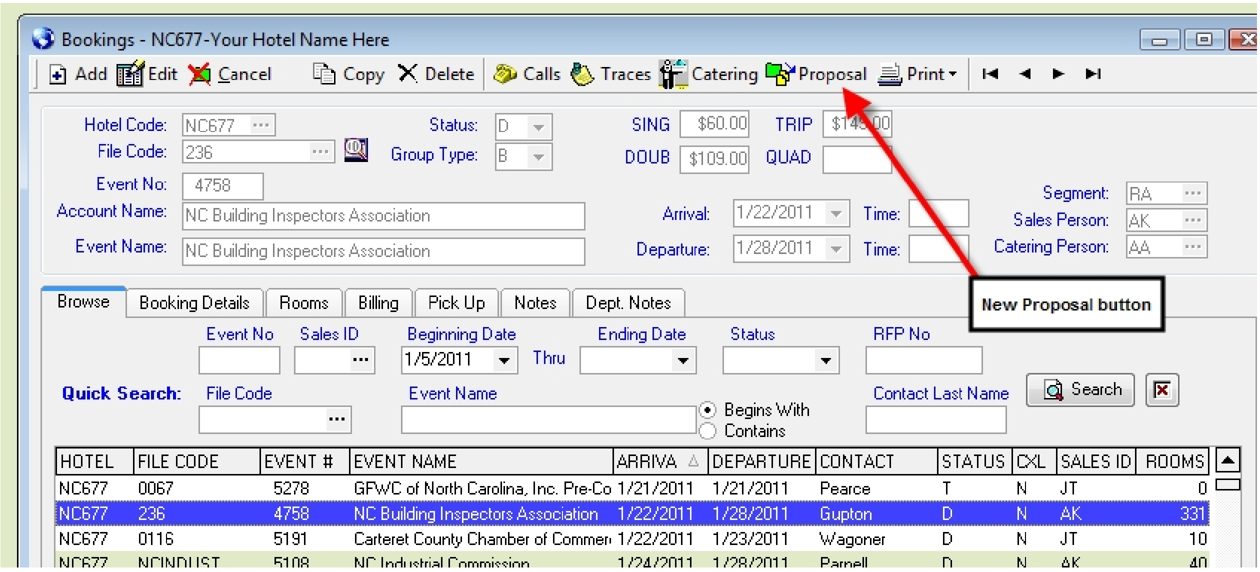
STS / Proposal Path Interface

Overview

STS has added functionality to interface with Proposal Path. This interface will allow a STS user to transmit the booking details to Proposal Path with just a few clicks. The document below describes how to use the interface.

Transmitting Booking Information To Proposal Path

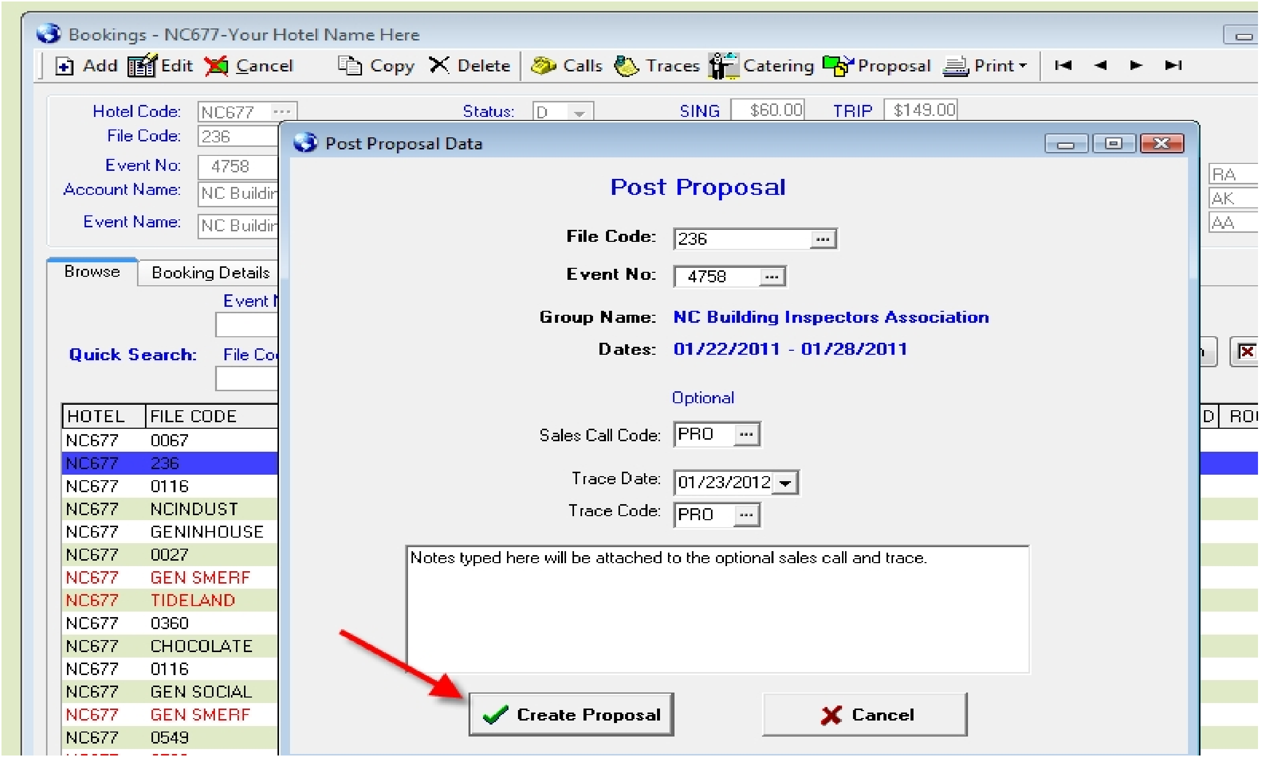
If the STS/Proposal Path interface is configured, you will see a new "Proposal" button on the Booking toolbar. Once you have entered and saved a booking, click the Proposal button.



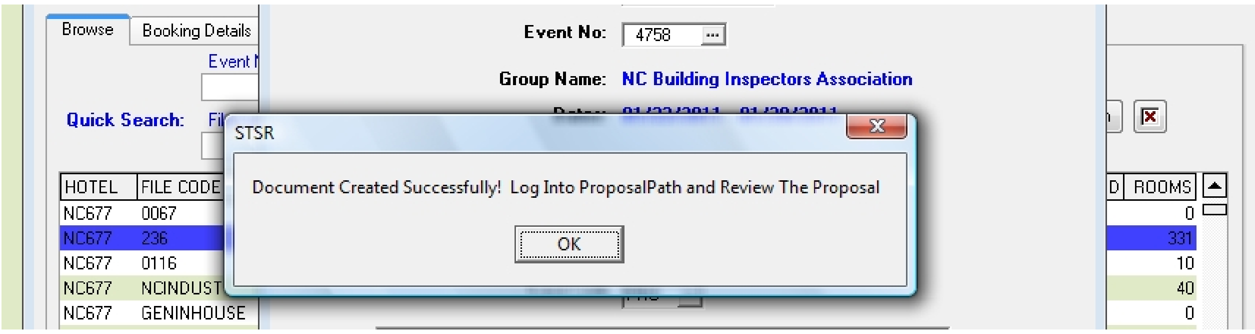
STS / Proposal Path Interface

Transmitting Booking Information To Proposal Path

Once you click the Proposal button on the toolbar, the window below will appear. It will recap the File Code, Event No, Group Name and Dates. You can also create a Sales Call and/or a Trace by filling in the optional fields. Click the "Create Proposal" button to transmit the information to Proposal Path.



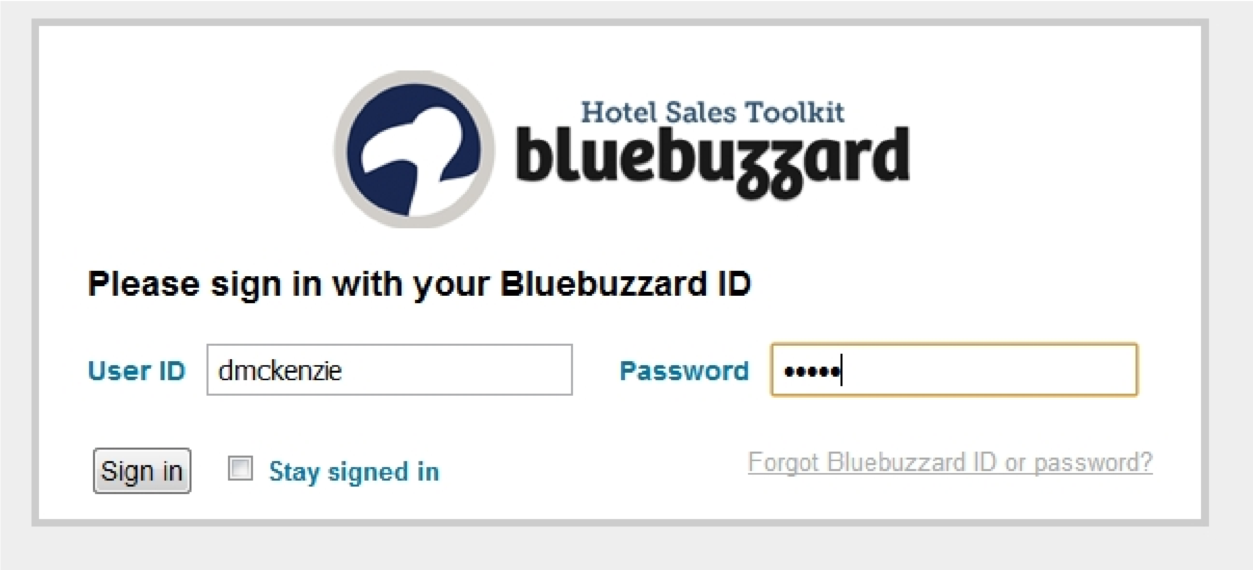
Once you click the Create Proposal button, you should see the message below. Note the document id. This is a document number Proposal Path assigns to every proposal created in their system.



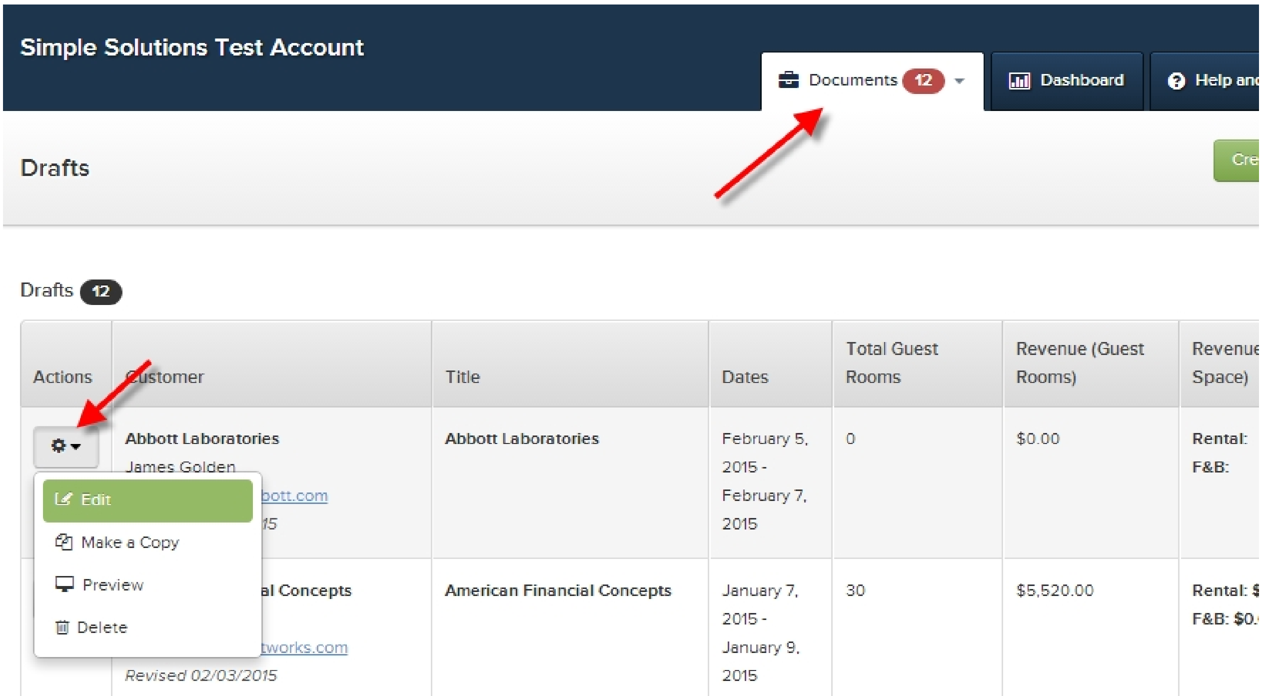
Click OK to close the message window and then Cancel to close the Post Proposal window. This will return you to the Booking screen. You can now log into Proposal Path and review the proposal.

STS / Proposal Path Interface

Review Proposal in Proposal Path
Log into Proposal Path with your username and password.



Once logged in, you should see the booking you tranmitted early. You can now review/edit the proposal as needed. Once you finished making any changes you can send the proposal to the client.

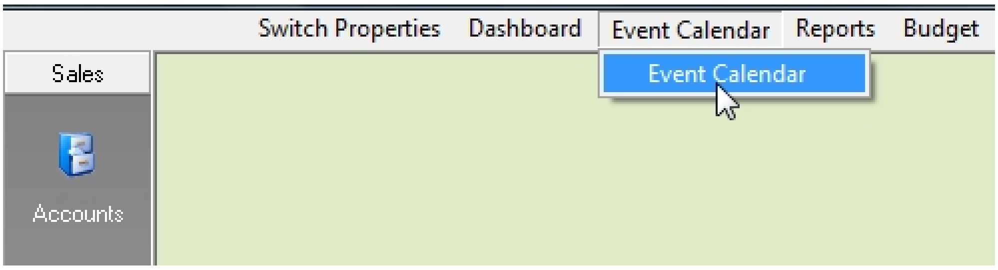


Event Calendar

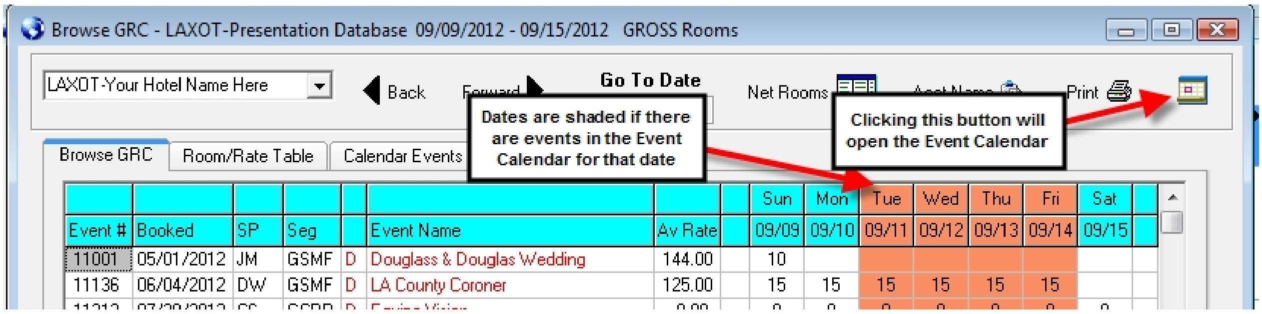
Event Calendar

The Event Calendar is a new feature that allows you to publish special events to a calendar the entire team can easily access.

You can access the Event Calendar from the **top** menu, or by clicking the Calendar button on the right of the Browse GRC screen.

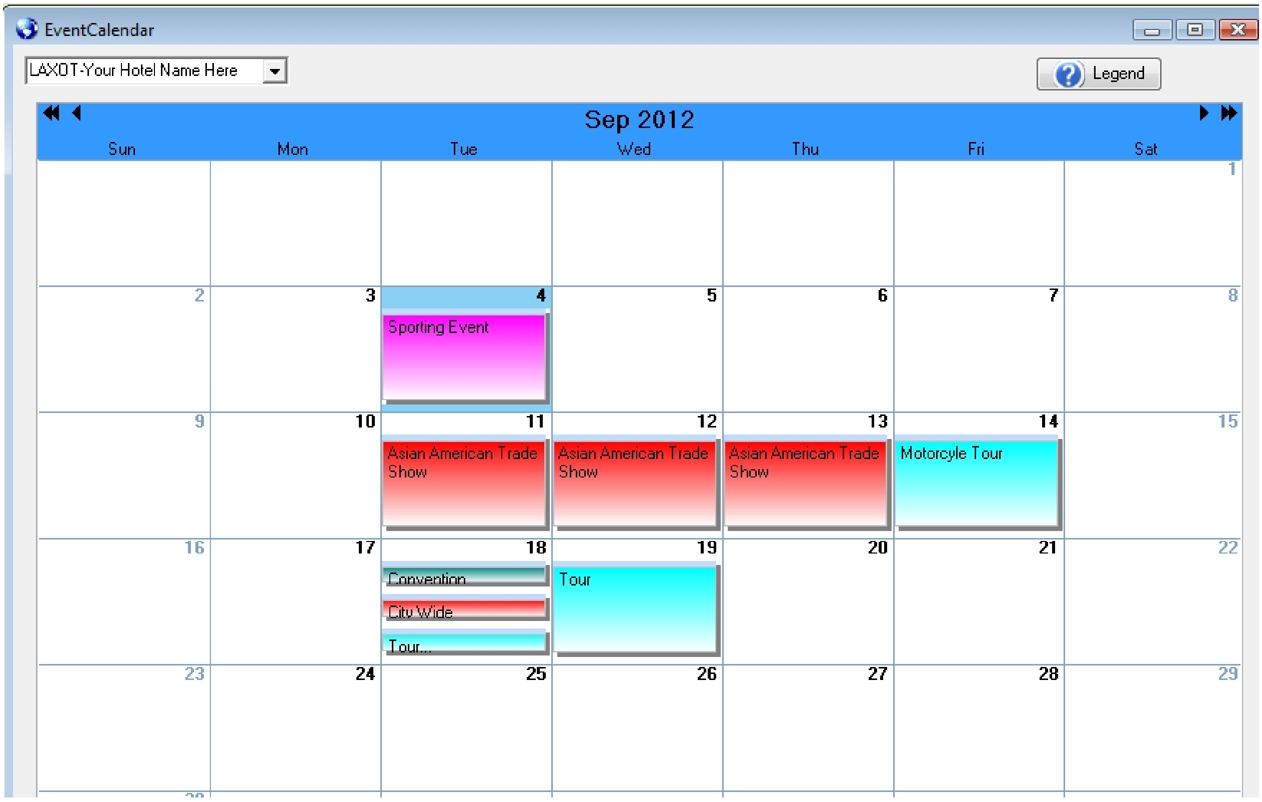


Dates are shaded on the GRC if there are events for those dates in the Event Calendar. Clicking the Calendar icon on the Browse GRC screen will open the Event Calendar to that month.

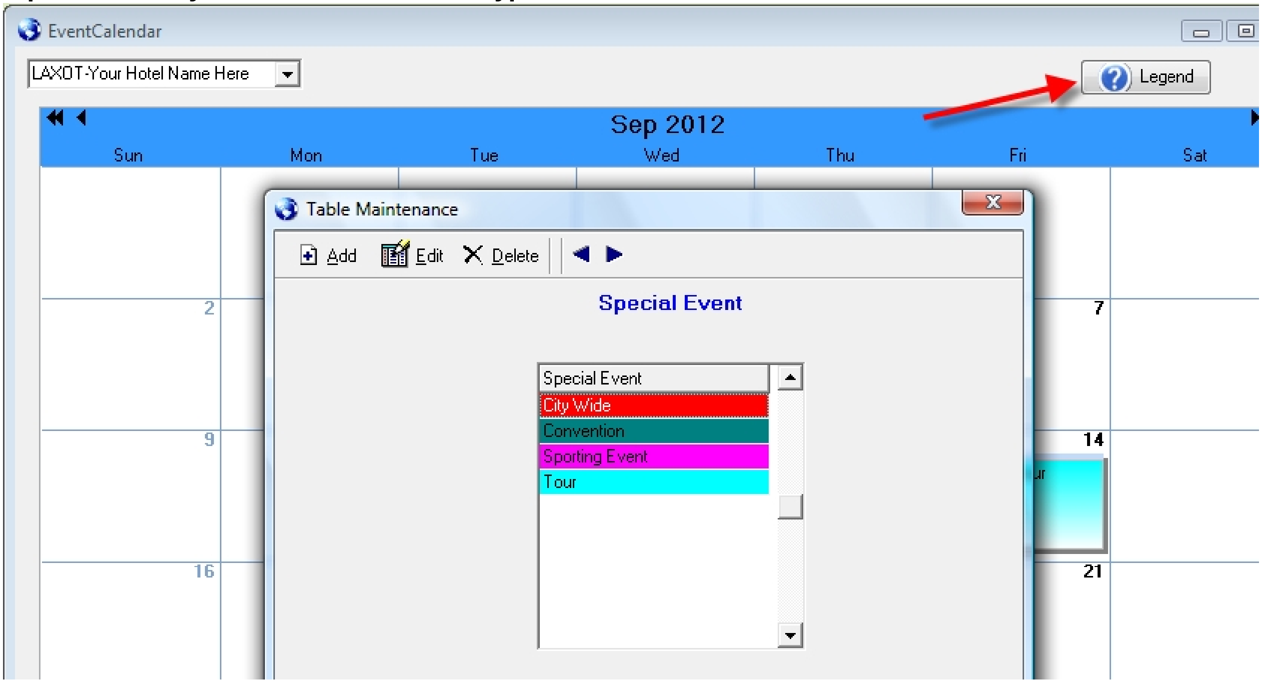


Event Calendar

Dates can have different colors and notes.

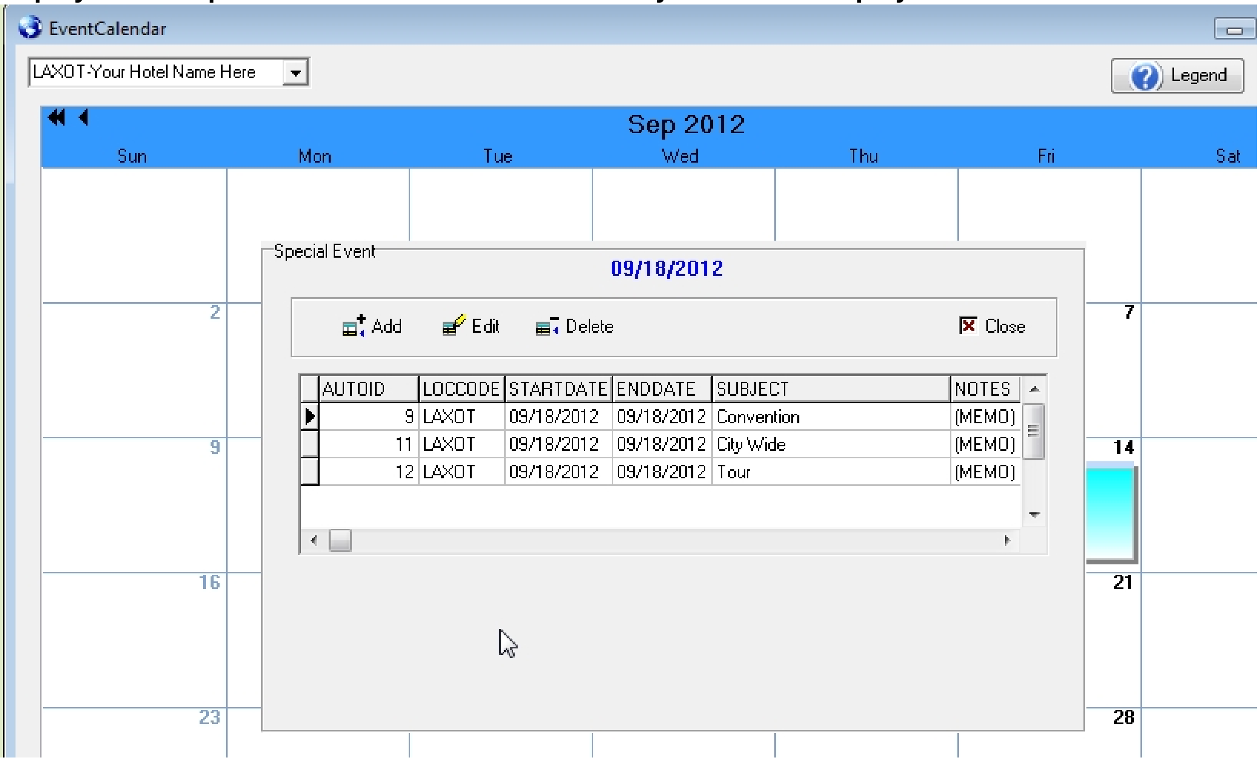


Clicking the Legend button will not only show you the color coding and what each color represents but you can add/edit event types real time.



Event Calendar

You can double click on a date to add/edit the event(s) for that date. Currently the screen can only display 3 events per date. You can add more but they will not be displayed due to the size of box.



Merge Account / Change File Code

STS – Merging Accounts / Changing a File Code

Below are the steps for Changing A File Code on an Account, and, **Merging two accounts together**. Sometimes you may just want to change a File Code on an account to something different. Other times you need to merge two accounts together.

Changing A File Code

1. Open the account screen. Retrieve the account that will be merged into the account you are keeping. Note the File Code and Corp No.
2. Next, click Utilities | Change Validated Fields. Change File Code.
3. Enter the current File Code (the one that is going away) in the first field.
4. Enter the new File Code in the second field.
5. Click OK. STS will change all contacts, calls, traces, bookings etc from the old File Code to the new one.
6. If you use the Daily Tracking screen to track accounts, think about changing the Corp No also if it was similar to the old File Code.

7. You can change the **Corp No** by clicking Utilities | Change Validated Fields | Change Corp No.
8. Enter the current Corp No in the first field.

9. Enter the New Corp No in the second field. Click OK.
10. STS will change the Corp No in the Daily Tracking file.

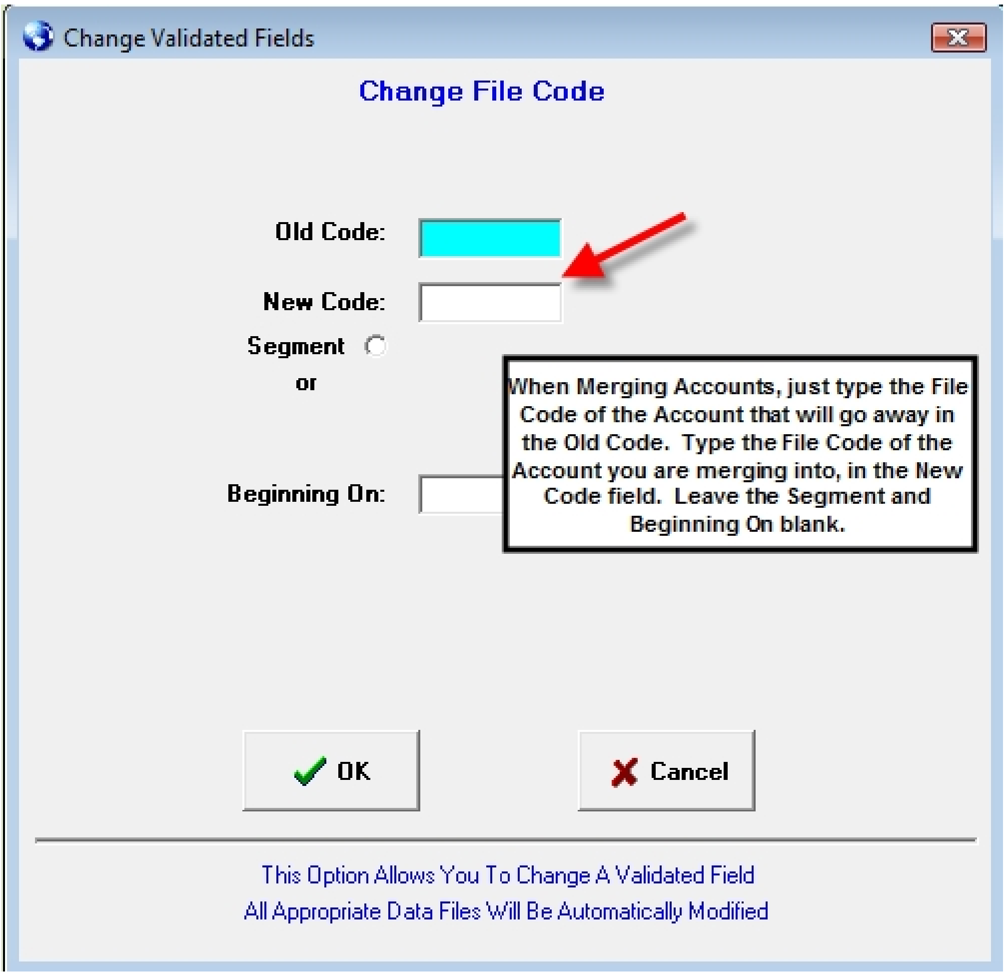
Merging Accounts

You can easily merge accounts too using the Change Validated Fields | Change File Code option. The first account will be merged into the 2nd. The File Code will be changed on all of the contacts, calls, traces and bookings under the first file code to the 2nd. Once the change is complete the first account will be deleted. If you have tracking posted under Daily Tracking, you will want to change the Corp No also.

11. Open the account screen. Retrieve the account that will be merged into the account you are keeping. Note the **File Code** and **Corp No**.
12. Retrieve the **2nd account**. The account you are merging into. Note the **File Code** and **Corp No**.
13. Next, click Utilities | Change Validated Fields. Change File Code.
14. Enter the first File Code (the one that is going away) in the first field.
15. Enter the second File Code in the second field.
16. Click OK. STS will change all contacts, calls, traces, bookings etc from the old File Code to the new one. Once completed, it would delete the original account.

17. You can change the **Corp No** by clicking Utilities | Change Validated Fields | Change Corp No.
18. Enter the current Corp No in the first field.
19. Enter the New Corp No in the second field. Click OK.
20. STS will change the Corp No in the Daily Tracking file.

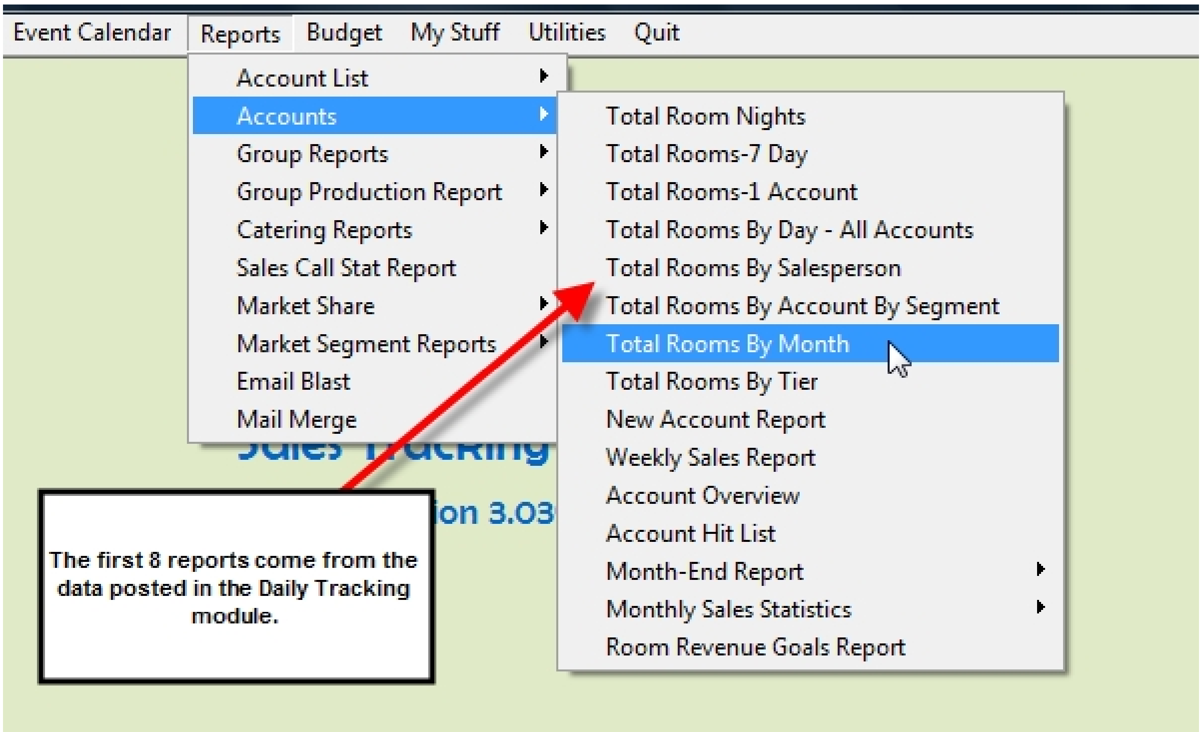
STS – Merging Accounts / Changing a File Code



Total Rooms by Month Report

Total Rooms by Month Report

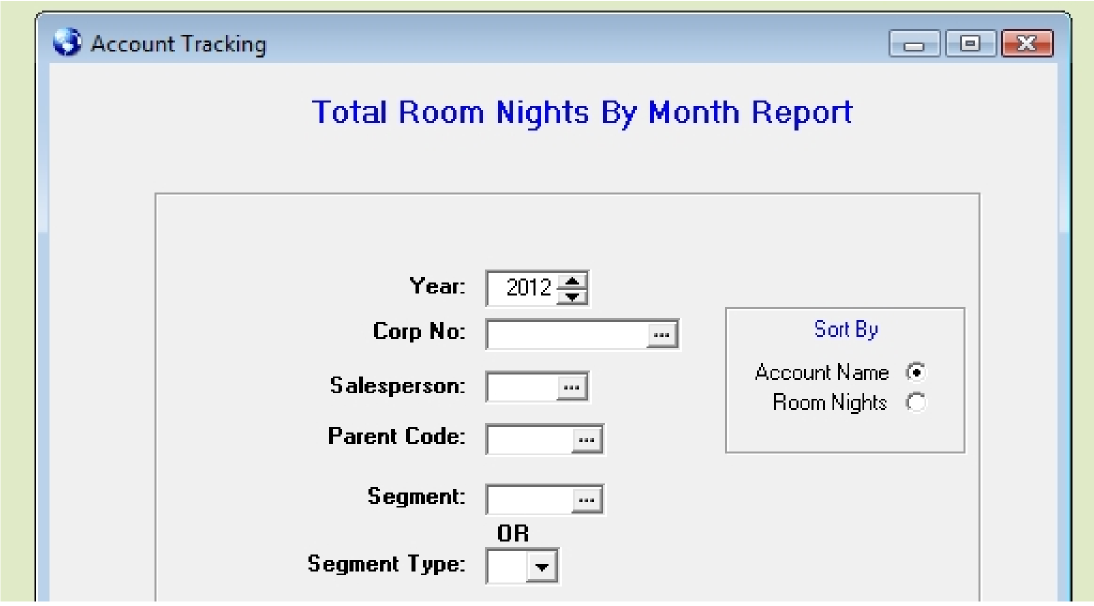
STS allows you to track account room and revenue production through the Daily Tracking module. You can post room and revenue actual by account by segment. The tracking information can be printed on a series of reports under the Reports | Account menu (see below). The information below focuses on the Total Rooms by Month Report.



The Total Rooms by Month report (Reports | Accounts | Total Rooms by Month) prints a summary of tracking entered for each company, by month, for a 3 year period. This report gives you a great way of reviewing year over year activity of the accounts you are tracking. Below see the steps for running this report.

Total Rooms by Month Report

Click Reports | Accounts | Total Rooms by Month. Choose the Year you want to run the report for. You can also filter the information by Sales Person, Parent Code and/or Segment. By default the report is sorted alphabetically by account name. You can choose to sort the report by room night volume too. Normally you would just choose the year and click OK.



The data is printed for January – December for 3 years beginning with the year chosen.

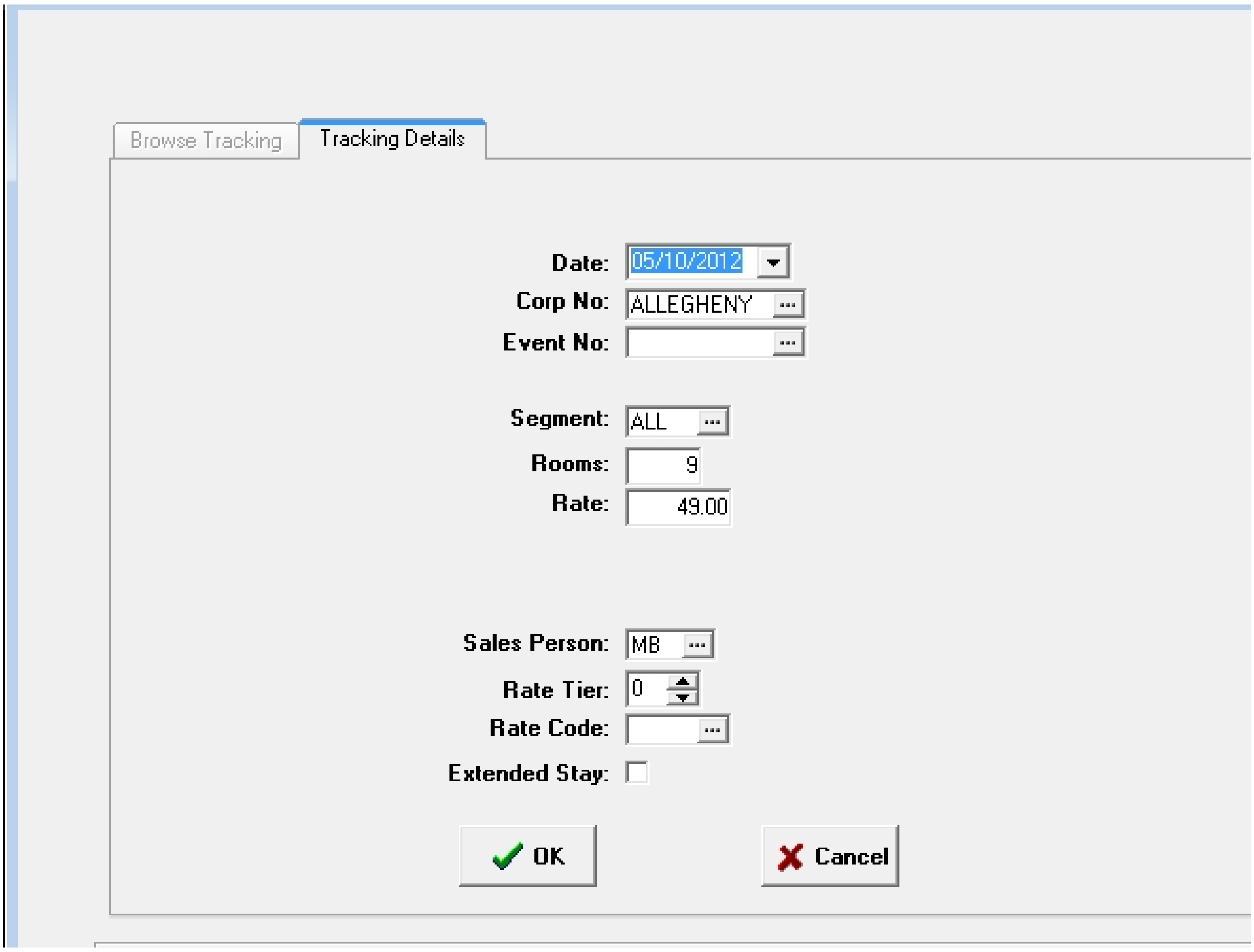
Report Date05/11/2012
Sorted On: Account Name

Total Room Nights Per Account
Dates: Between 01/01/2010 and 12/31/2012
Salesperson: All Salespersons
Segment: All Segments

Corp #	Account Name	Year	Rate	Total	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
AARON	Aaron-Mordcai Wedding	2012	$0.00	0	0	0	0	0	0	0	0	0	0	0	0	0
		2011	$0.00	0	0	0	0	0	0	0	0	0	0	0	0	0
		2010	$69.12	50	0	0	0	0	0	0	0	50	0	0	0	0
AARSAND	Aarsand Management	2012	$0.00	0	0	0	0	0	0	0	0	0	0	0	0	0
		2011	$65.00	2	0	0	0	0	0	0	0	2	0	0	0	0
		2010	$0.00	0	0	0	0	0	0	0	0	0	0	0	0	0
ALLEGCORP	Allegheny Power Corporate	2012	$67.15	108	2	57	35	14	0	0	0	0	0	0	0	0
		2011	$66.77	206	68	52	9	1	47	5	3	3	8	6	2	2
		2010	$66.83	604	5	5	48	28	33	44	19	39	125	93	85	80
ALLEGHENY	Allegheny Power Training	2012	$48.94	564	4	102	298	118	42	0	0	0	0	0	0	0
		2011	$49.10	1862	197	134	459	258	96	142	64	97	139	215	59	2
		2010	$49.06	1892	1	198	154	190	320	185	118	143	174	374	30	5
ALLIED	Allied Waste Mangement	2012	$68.00	18	10	3	5	0	0	0	0	0	0	0	0	0
		2011	$60.83	312	2	0	0	2	20	71	19	25	1	151	21	0
		2010	$62.00	134	14	28	36	9	4	0	2	20	4	17	0	0
AMEXTRAVE	American Express Travel	2012	$0.00	0	0	0	0	0	0	0	0	0	0	0	0	0

Total Rooms by Month Report

The Total Room Nights report derives its data from the Daily Tracking screen (Daily Tracking left menu).



The Daily Tracking screen is slightly different than the other screens in STS. Once you click the "Add" button for the first time, to enter a new transaction, you do not have to continue clicking Add to enter subsequent transactions. Once you click the OK button, to save the entry, you can immediately begin entering the next transaction. Once you have finished entering all transactions, click the Cancel button and close the Daily Tracking screen.

You may track any number of accounts through Daily Tracking but you should, at a minimum, track your volume accounts.

Weekly Sales Report

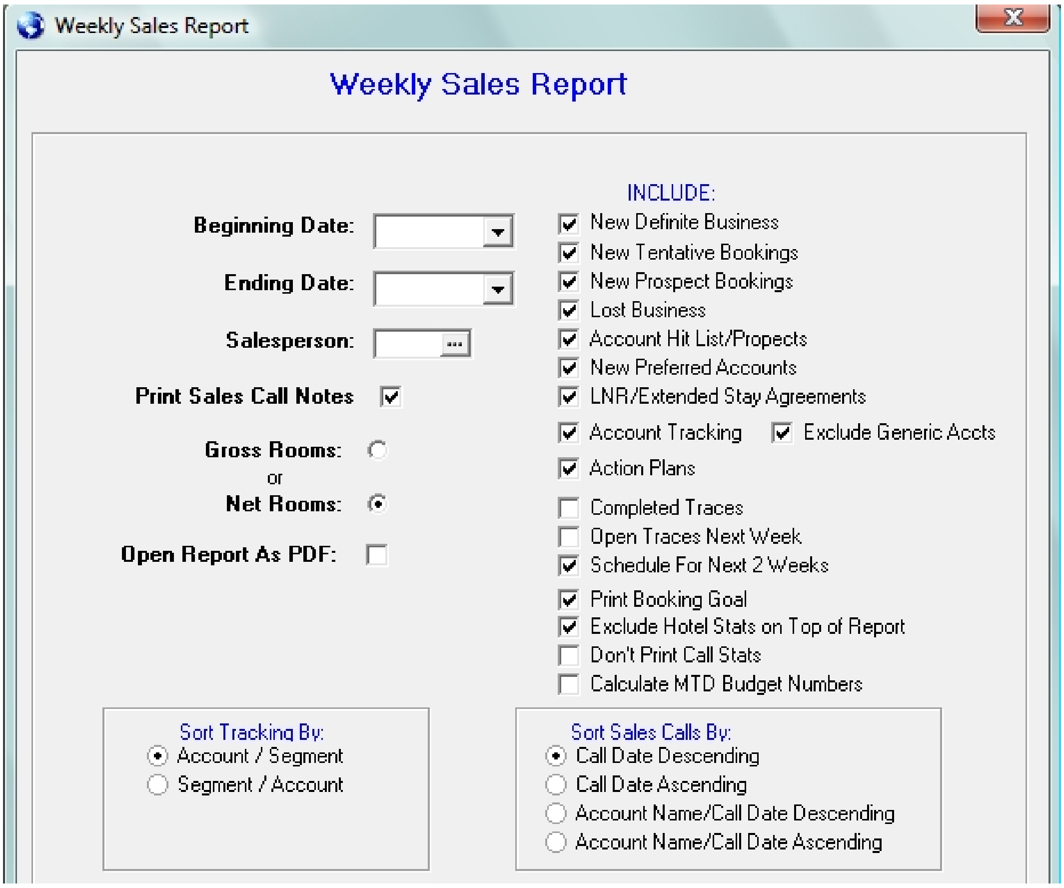
Weekly Sales Report

The Weekly Sales Report was designed to summarize and print key booking and sales activities for a sales person. This document will explain each section in detail and where each of these sections derives its information. Below is a summary of each section. Further in this document each section is explained in detail.

Weekly Sales Report Sections

Month To Date Totals
New Group Business Booked
New Catering Business Booked
Account Tracking
Sales Call Statistics
Core Sales Call Details/Notes
Lost Business
Target Account List
New Preferred Account
New LNR/Extended Stay Agreements
Completed Traces
Open Traces
Action Plans
Agenda for Next 2 Weeks

To print the Weekly Sales Report click **Reports | Accounts | Weekly Sales Report**. You will then see a screen similar to the one below. Set the range of time you would like to print the report for and the sales person's initials. You also have the option to include the various sections. STS will remember your choices and check those automatically the next time you run the report. Click OK once you have set the parameters.



Weekly Sales Report

Month To Date Totals - Actual

The first section of the Weekly Sales Report is the Month To Date totals.


Your Hotel Name Here
Weekly Sales Report
Hotel Code: XXXXX
Salesperson: MLH-Mark Howard

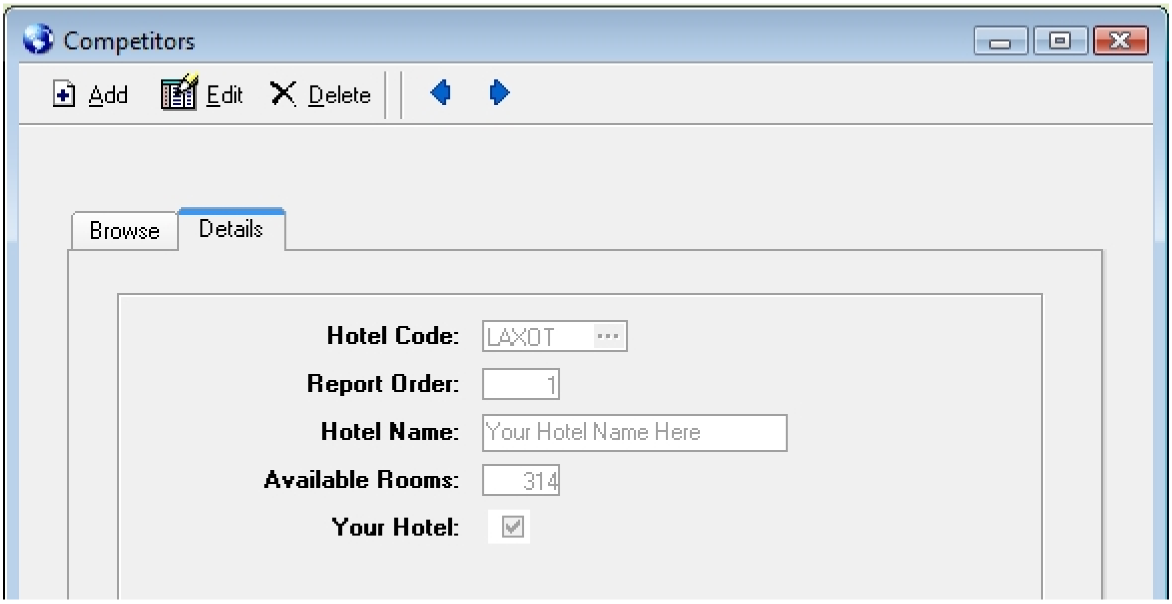
Page: 1

Today's Date: 5/9/2006
Beginning Date: 5/1/2006
Ending Date: 5/7/2006

Month To Date Totals:	Actual	Budget	Variance
Occupancy:	86.1 %	85.2 %	00.9 %
ADR:	$133.37	$131.40	$1.97
Room Revenue:	555,325	541,493	13,832
RevPAR:	$114.83	$111.97	$2.86

STS has several reports that include monthly occupancy and revenue numbers. To save users from entering these numbers multiple times, STS pulls the "Actual" numbers for the Weekly Sales report from the Market Share screen. Even if you do not plan on printing the Market Share report you need to configure this screen so you can enter your month to date occupancy and revenue numbers to be included in the Weekly Sales report. Below are the steps for configuring the Market Share Screen.

1. Click Utilities | Competitors. When the screen opens click the Add button.
2. Enter 1 for the Report Order. Enter your hotel name, number of rooms in your hotel and check the box labeled "Your Hotel". Click OK to save.
3. You do not need to add competitors to this screen if you do not plan on printing the Market Share report.



You can close the Competitors screen. The next steps will be for entering the month to date numbers.

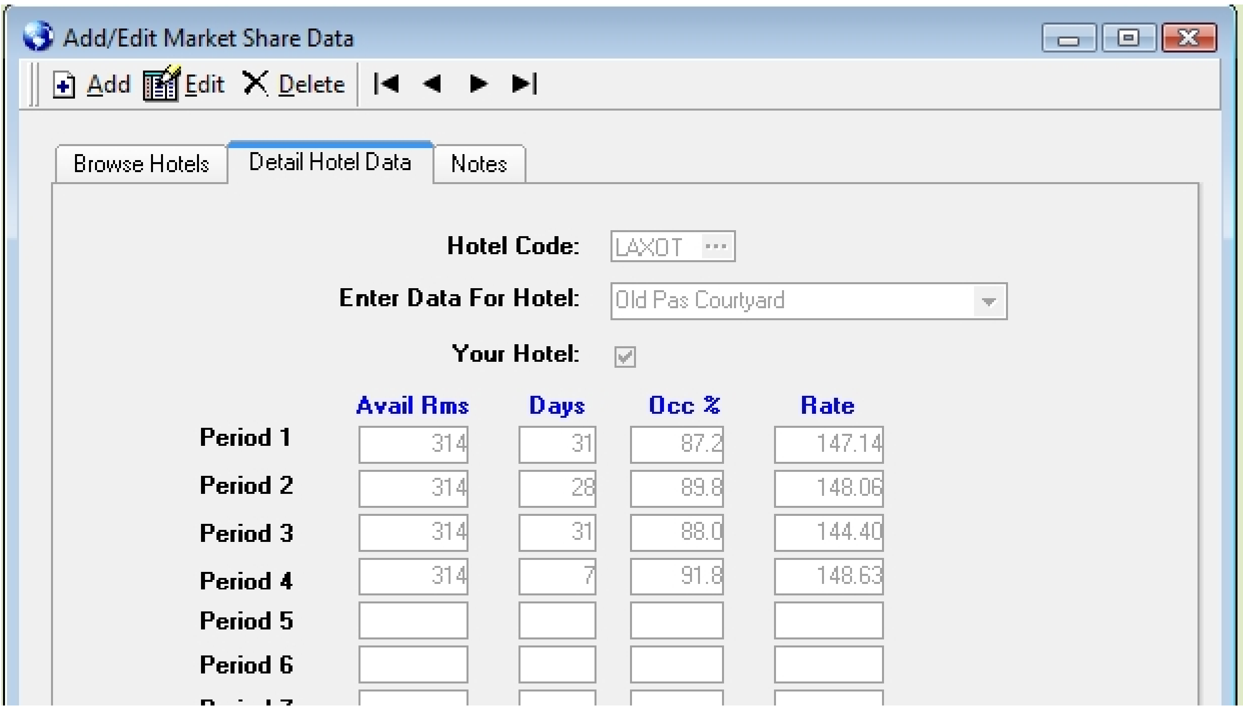
Weekly Sales Report

Month To Date Totals - Actual

The next step is to add your hotel to the Market Share screen and begin entering your monthly occupancy/revenue stats.

1. Click Budget | Market Share. Enter the current year. Click OK.
2. Click Add. Click the drop down arrow to the right of the "Enter Data For Hotel" line. Choose your hotel.
3. Check the box labeled "Your Hotel".
4. Click OK to save.

You have now added your hotel to the Current Year Market Share data set. **You do not need to "Add" your hotel again for the current year. Each time you visit this screen, to update your monthly occupancy/revenue numbers, you will highlight your hotel and click Edit. You can then update the numbers and click OK to save**.



Notice how for Period 4 (April) I have only entered "7" for the number of days. You only need to enter the number of days that have transpired for the current period. Each week you can revisit this screen and update the number of days that have transpired so far during the current month. You will also enter updated month to date occupancy percentage and month to date average rate. Once you have updated the numbers click OK to save. The updated "Actual" numbers will print on the top of the Weekly Sales Report under the Actual column.

Weekly Sales Report

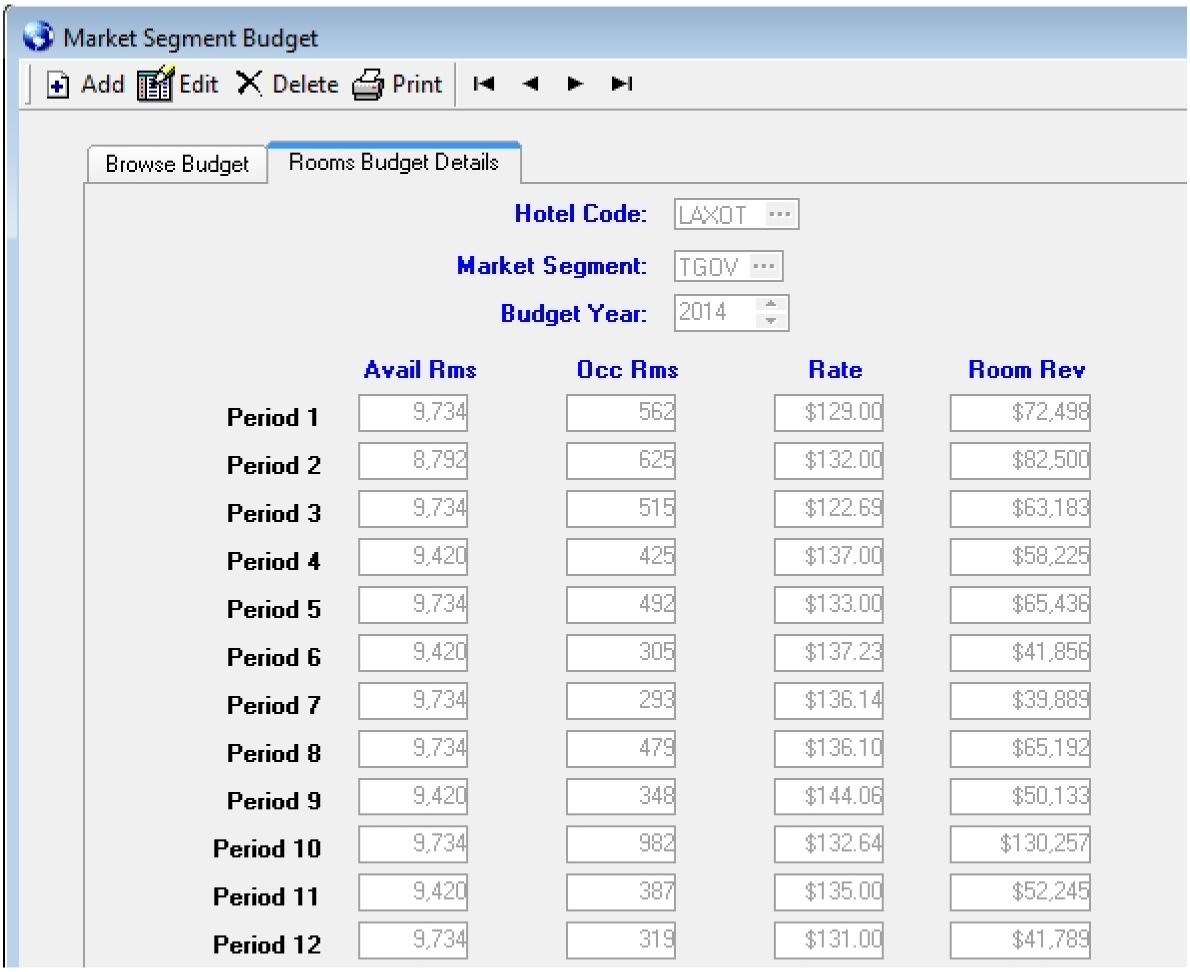
Month To Date Totals – Budget

The next step is to add your hotels budget so budget numbers will appear on the top of the Weekly Sales Report. These budget numbers will print on a number of other reports in STS also. The budgets in STS were designed to be loaded by market segment. This allows you to load your transient budget separate from your group budget. If your budget is not broken out by segment you can load the entire hotel budget under one segment but, it is recommended you load it for each segment you have a budget for.

Below are the steps for entering your rooms budget.

1. Click Budget | Rooms Budget. When the Market Segment Budget screen appears, click Add.
2. Choose your hotel code from the look up list.
3. Choose the market segment, from the look up list, you would like to enter budget numbers for.
4. Choose the Year you are entering budget numbers for.
5. Fill in each field for all 12 periods. Click OK to save.

The Avail Rms column is the “total” available rooms each month. Repeat this process until you have loaded your entire hotel budget.



Weekly Sales Report

New Group Business Booked

The next section of the Weekly Sales Report prints new group business booked during the specified time period. Definite bookings are included automatically. You can also include Tentative and/or Prospect groups. Groups are included if they have a Booked Date or turned Definite during the specified time period.

New Business Booked: Net Rooms- Definites, Tentatives, Prospects

Loc Code	Event #	Account Name	Sales Ids	Status	Booked On	Arrival	Rm Nts	Rate	Rm Revenue
LAXOT	13336	McGraw Family Hill Experience Reunion	ZG / ZG	D	03/12/2014	08/01/2014	30	$149.00	4,470
LAXOT	13357	Arkema	ZG / ZG	D	03/12/2014	04/06/2014	168	$159.00	26,712
LAXOT	13407	Travel Willis Bennet	ZG / ZG	D	03/11/2014	04/24/2014	35	$114.00	3,990
LAXOT	13427	Pacific Oaks College Commencement Group	ZG / ZG	D	03/12/2014	05/02/2014	28	$129.00	3,612
LAXOT	13457	Western State Conference Finals	ZG / ZG	D	03/12/2014	04/27/2014	24	$109.00	2,616
LAXOT	13467	Pepperdine University	ZG / TL	D	03/12/2014	05/02/2014	40	$119.00	4,760
LAXOT	13482	Slow Fusion Volleyball Group	ZG / ZG	D	03/10/2014	03/27/2014	60	$109.00	6,540
SUB-TOTAL							385		52,700
LAXOT	13477	Clayton Services Group 1	ZG / ZG	T	03/10/2014	05/18/2014	25	$133.00	3,325
LAXOT	13478	Clayton Services Group 2	ZG / ZG	T	03/10/2014	05/04/2014	30	$133.00	3,990
LAXOT	13480	Glendale High School 50th Reunion	ZG / ZG	T	03/10/2014	10/24/2014	30	$129.00	3,870
LAXOT	13517	US Marshals Service	ZG / ZG	T	03/13/2014	03/16/2014	32	$133.00	4,256
SUB-TOTAL							117		15,441
TOTAL							502		68,141

New Catering Business Booked

The next section of the Weekly Sales Report prints new catering functions booked during the specified time period. Definite catering functions are included automatically. You can also include Tentative and/or Prospect catering. Functions are included if they have a Booked Date or turned Definite during the specified time period.

New Catering Booked: Definites, Tentatives, Prospects

Event #	Account Name	SID	Stat	Booked On	Arrival	Food	Bev	Rm Rent	AV Rev	Oth Rev
13489	Anthony International	TL	D	03/26/2014	04/22/2014	2,363	0	250	150	0
13489	Anthony International	TL	D	03/26/2014	04/24/2014	1,575	0	250	150	0
13490	Sales Blitz	TL	D	03/11/2014	03/12/2014	1,575	0	250	150	0
SUB-TOTAL						5,513	0	750	450	0
13491	UC Davis	TL	T	03/11/2014	04/10/2014	1,575	0	250	150	0
13492	UC Davis	TL	T	03/11/2014	05/09/2014	1,575	0	250	150	0
SUB-TOTAL						3,150	0	500	300	0
13493	Pfizer	TL	D	03/11/2014	03/12/2014	1,575	0	250	150	0
13493	Pfizer	TL	D	03/11/2014	03/13/2014	1,575	0	250	150	0
SUB-TOTAL						3,150	0	500	300	0
TOTAL						11,813	0	1,750	1,050	0

Weekly Sales Report

Account Tracking

The Account Tracking section will print tracking, per account, entered in the Daily Tracking screen in STS.

Account Tracking			03/09/2014 - 03/15/2014			Year To Date		
Corp No	Account Name	Seg	Rooms	ADR	Revenue	Rooms	ADR	Revenue
42E-T	42 Entertainment	TLNR	3	199.00	597	8	199.00	1,592
ATT-T	ATT	TNAT	18	155.22	2,794	98	176.11	17,259
BALL-T	Ball Aerospace Corporation	TLNR	2	229.00	458	2	229.00	458
DELTEK-T	Deltek	TNAT	10	171.50	1,715	91	173.73	15,809
EMC-T	EMC	TNAT	1	206.00	206	14	206.00	2,884
EY-T	Ernst & Young	TNAT	5	173.00	865	35	182.43	6,385
FEDERAL-T	Federal Government - Individual	TGOV	44	148.66	6,541	747	139.82	104,442
GUIDE-T	Guidance Software	TNAT	9	171.00	1,539	69	164.97	11,383
JPL-T	JPL - T	TLNR	29	133.00	3,857	301	133.24	40,105
LOCKHD-T	Lockheed Martin	TNAT	6	169.00	1,014	20	165.50	3,310
MAXIT-T	Max IT Healthcare, LLC	TLNR	8	154.63	1,237	76	163.04	12,391
MCKSN-T	McKesson	TNAT	7	170.00	1,190	23	170.00	3,910
MSOFT-T	Microsoft	TNAT	4	195.00	780	10	203.50	2,035
PARSON-T	Parsons - Individual Travel	TNAT	156	171.98	26,829	663	174.01	115,366
ROCHE-T	Roche Group	TNAT	8	206.00	1,648	9	206.00	1,854
SIEMENS-T	Siemens	TLNR	5	206.00	1,030	5	206.00	1,030
XEROX-T	Xerox	TNAT	10	177.00	1,770	93	176.11	16,378
	TOTAL		325		54,070	2,264		356,591

Call Statistics – w/Goals

The Call Statistics section will summarize how many of each type of call a sales person has entered into STS during the specified period of time. These call counts will be multiplied times the point worth of each call type with a Total Points column being calculated. The Point Goal column will also print and display a variance of points accumulated points versus the point goal. The Point Goal will be the "calculated" value for the period of time you run the report for. Let's say you run the Weekly Sales Report for 7 days. STS will look at the monthly point goal for each call type. It will then divide that number by the number of days in the month to get an estimated "daily" goal. It will then multiply that daily goal times the number of days you ran the report for.

Call Statistics - w/Goals					
ID	Type Of Call		Total Calls	Total Goal	Variance Calls w/Goals
SB	APP	Appointment	4	3	1
SB	CI	Community Involvement	0	1	-1
SB	LNR	New LNR/CNR Account	0	1	-1
SB	OSC	Outside Sales Calls	0	3	-3
SB	PQF	Prospecting Call	8	14	-6
SB	RFP	RFP's	0	7	-7
SB	RGT	Book/Re-book Group	5	4	1
SB	SSI	Site Inspection	3	3	0
SB	TMC	Telephone Maintenance Ca	6	0	0
		Totals	26	36	-16

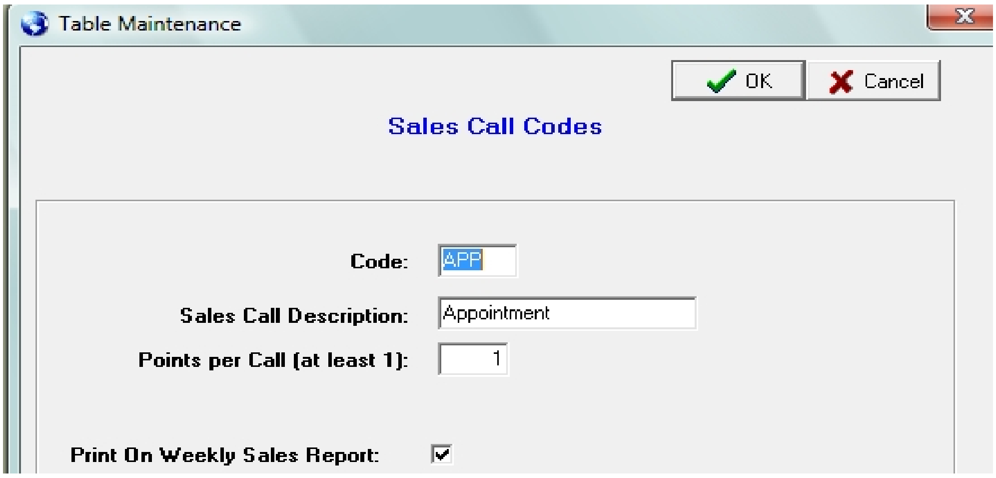
Weekly Sales Report

Call Statistics – w/Goals

The Goal is a product of the number of calls times the point worth of each call type. By default, each call should be assigned a value of 1 point unless you are weighting the call types by assigning different point values for each call type. Below find instructions for reviewing changing the call/point goals. The number of calls per month can be changed as needed. Approval may be required before changing your call goals.

Reviewing Call Type / Point Values

The call codes and descriptions in this document may differ from the codes and point values you use but the steps to review/modify will be the same. To review the call types and point values click Utilities | Table Maintenance | Sales Call Codes.

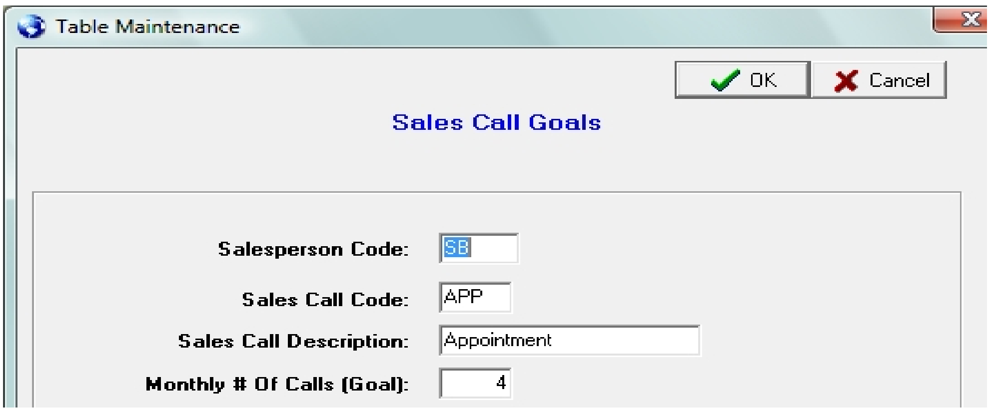


The “Print On Weekly Sales Report” field controls whether the actual notes for this call type prints on the report.

Reviewing/Modifying Monthly Call Goals

Once you have reviewed the point totals for each call type you can review/modify the monthly call goals as needed. Below are the procedures for reviewing/modifying the monthly call goals for each type.

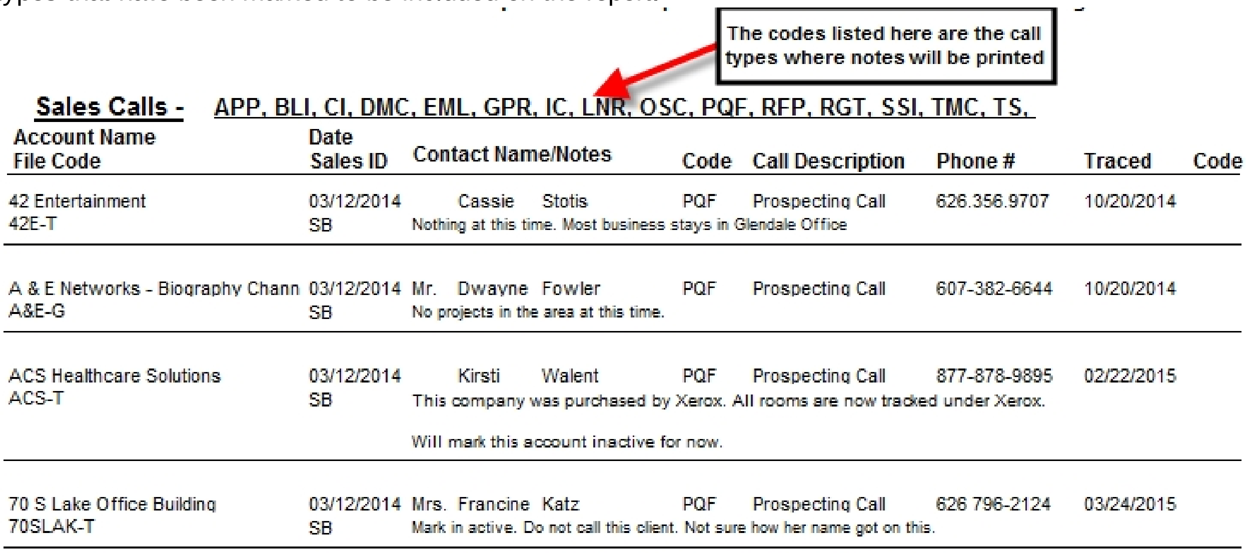
Click Utilities | Table Maintenance | Sales Call Goals. For existing goals, highlight the goal and click Edit. You can modify the monthly goal as needed. To Add a new goal click Add. Enter the Sales Person’s initials, Sales Call Code, Sales Call Description and the number of calls that should be made each month. The number of calls, times the point value for each call type, will calculate the month point goal for that call type.



Weekly Sales Report

Sales Calls – Details

The next section of the Weekly Sales Report will print the sales call details, including call notes, for the call types that have been marked to be included on the report.

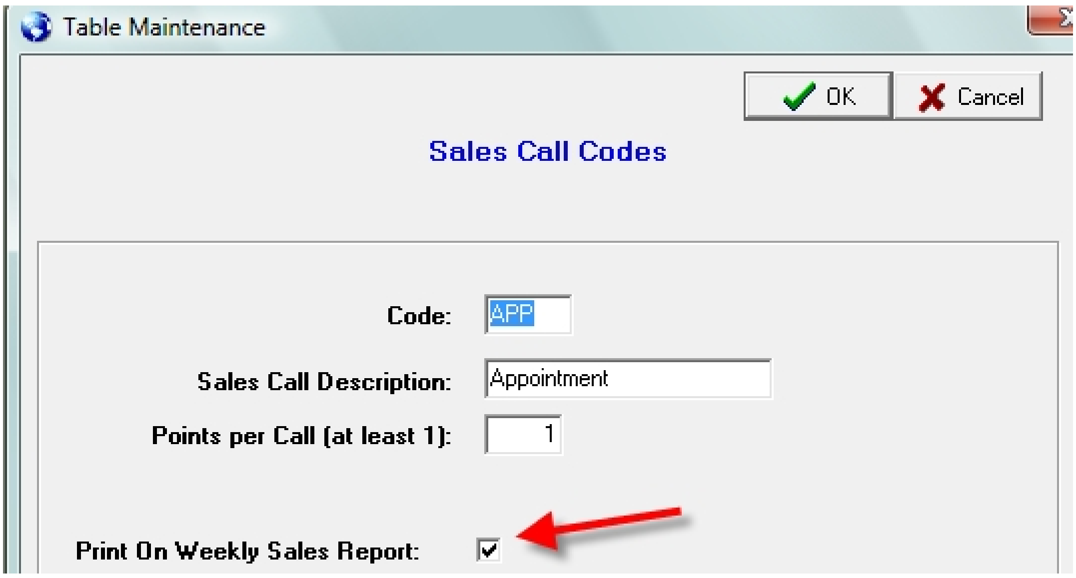


The codes listed here are the call types where notes will be printed

Sales Calls - APP, BLI, CI, DMC, EML, GPR, IC, LNR, OSC, PQF, RFP, RGT, SSI, TMC, TS,

Account Name File Code	Date Sales ID	Contact Name/Notes	Code	Call Description	Phone #	Traced	Code
42 Entertainment 42E-T	03/12/2014 SB	Cassie Stotis Nothing at this time. Most business stays in Glendale Office	PQF	Prospecting Call	626.356.9707	10/20/2014	
A & E Networks - Biography Chann A&E-G	03/12/2014 SB	Mr. Dwayne Fowler No projects in the area at this time.	PQF	Prospecting Call	607-382-6644	10/20/2014	
ACS Healthcare Solutions ACS-T	03/12/2014 SB	Kirsti Walent This company was purchased by Xerox. All rooms are now tracked under Xerox. Will mark this account inactive for now.	PQF	Prospecting Call	877-878-9895	02/22/2015	
70 S Lake Office Building 70SLAK-T	03/12/2014 SB	Mrs. Francine Katz Mark in active. Do not call this client. Not sure how her name got on this.	PQF	Prospecting Call	626 796-2124	03/24/2015	

The codes of the call types that are included in the section are detailed here.



Once again, the each of the call codes that have the “Print On Weekly Sales Report” box checked will be included in this section.

Weekly Sales Report

Lost Business Section – The new Lost Business section prints a summary of the lost business entries for the dates specified. Lost Business entries come from canceling bookings or entering inquiries into the Lost Business screen. When reviewing the lost business transactions you can tell which ones were canceled booking as they have an Event Number. Inquiries logged in the Lost Business screen do not.

Lost Business

Event#	Group Name	SID	Lost On	Arrival	Reason	Rms	Rm Rev	FB Rev	Total Rev
13309	UCSD Fencing	ZG	03/03/2014	03/08/2014	Unmet Room Type Nee	12	12	0	1,488
12989	Caltech Chemistry Admissions Group	ZG	03/05/2014	02/27/2014	Unknown Reason	90	90	0	10,710
13466	Pepperdine University	ZG	03/12/2014	04/25/2014	Guest Rooms Unavaila	40	40	669	5,429
13409	Ca State Invitational Jr. Golf Tournament	ZG	03/12/2014	06/29/2014	Disagree w/Cntrct Ter	60	60	0	6,540
TOTAL						202	23,498	669	24,167

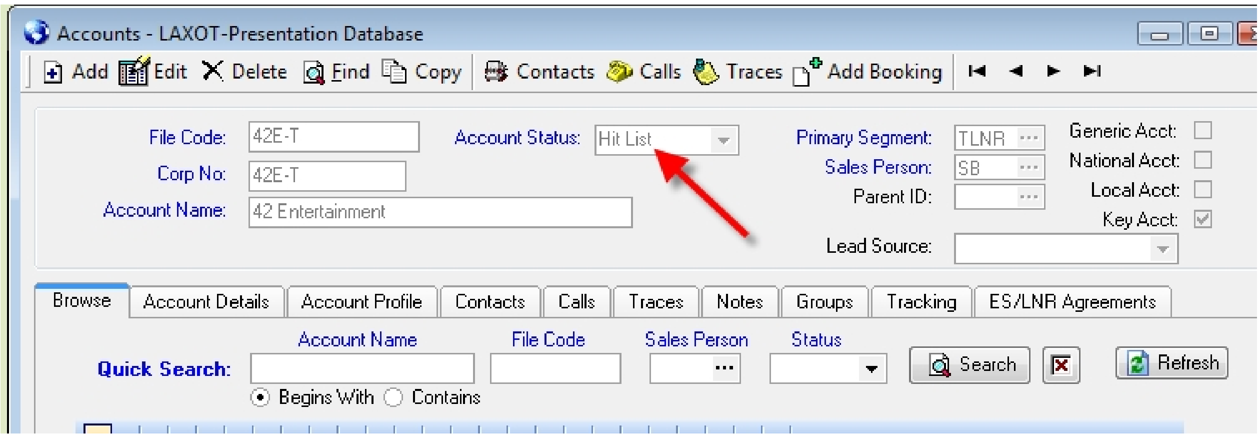
Target Accounts/Hit List – The Target Account/Hit List section prints accounts that have been marked as a Hit List account. It also includes important statistics including the last call date, next trace and projected revenue potential. The potential rooms and revenue come from the Account Profile tab on the Account screen.

Target Accounts/Hit List

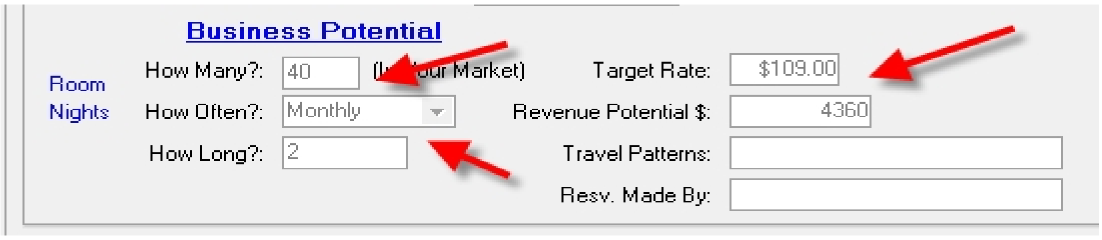
Account Name	SID	Status	Added On	Last Call	Next Trace	Room Potential	How Often	Revenue Potential
42 Entertainment	SB	Hit List	10/26/2007	03/28/2014	04/08/2014	40	Monthly	4,360
A & E Networks - Biography Channel	SB	Hit List	07/05/2012	03/12/2014	10/20/2014	50	Monthly	5,950
ITT	SB	Pipeline	03/07/2007	07/10/2013				

Weekly Sales Report

Account Hit List – You can mark an account as a Hit List account on the account screen. Choose Hit List from the Account Status drop down while adding a new account, or, retrieve an existing account and click Edit to change the status.



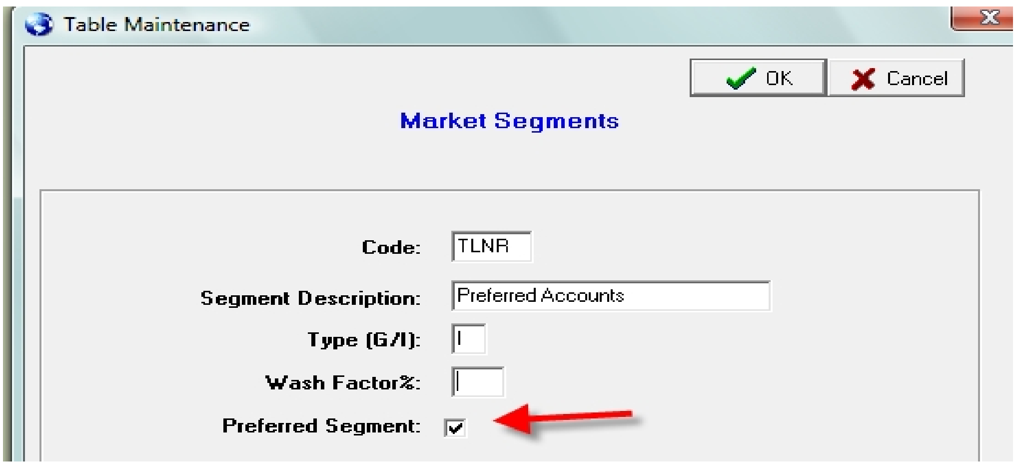
Potential room and revenue numbers can be entered on the bottom of the Account Profile tab for the account.



New Preferred Accounts – The New Preferred Account section prints new accounts that have been marked with the Preferred Segment. It also includes important statistics including the last call date, next trace and projected revenue potential. The potential rooms and revenue come from the Account Profile tab on the Account screen. The "Preferred" segment is identified by checking the "Preferred Segment" box under Utilities | Table Maintenance | Market Segments.

New Preferred Accounts Accounts

Account Name	SID	Status	Added On	Last Call	Next Trace	Room Potential	How Often	Revenue Potential
42 Entertainment	SB	Hit List	03/17/2014	03/28/2014	04/08/2014	40	Monthly	4,360

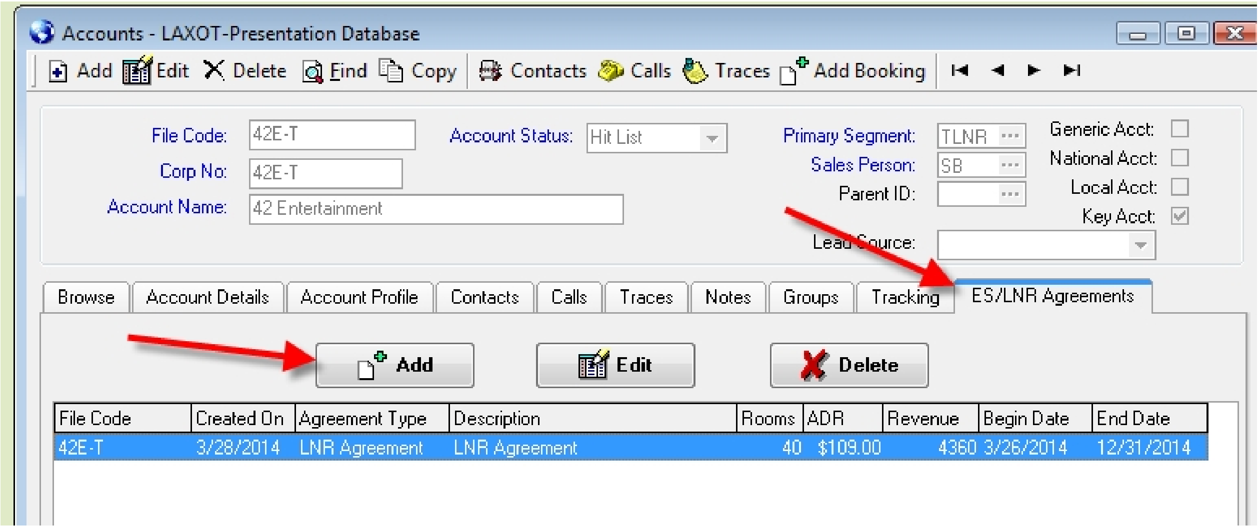


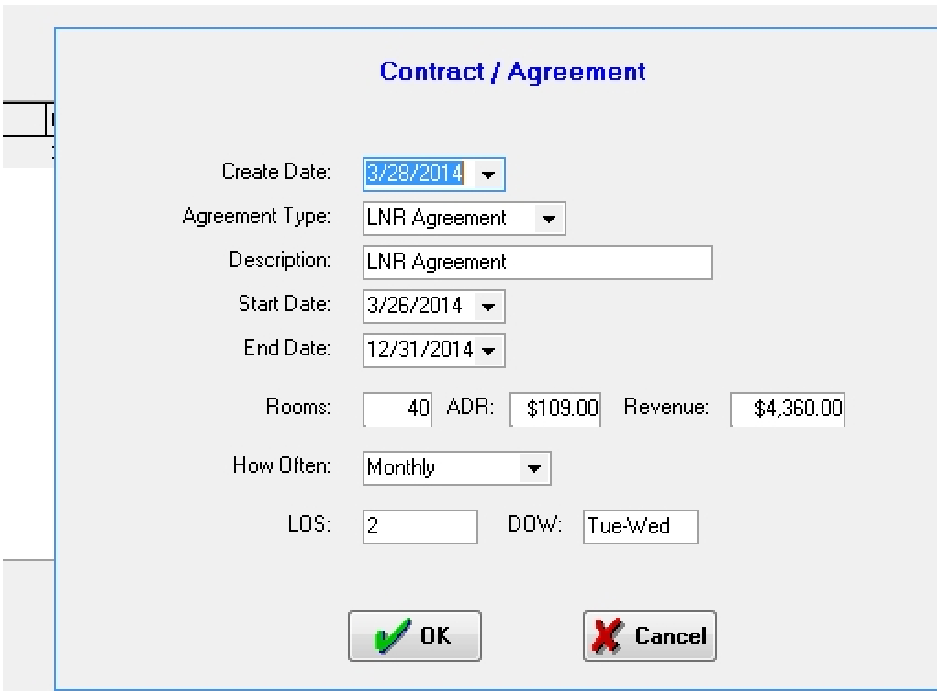
Weekly Sales Report

New LNR/Extended Stay Agreements – This section will print any new LNR/Extended Stay agreements that have been added to an account. Once you click the ES/LNR Agreements tab you will find buttons to Add, Edit or Delete agreements for the account listed.

New LNR/Extended Stay Contracts

Account Name	Agree Type	SID	Created	Start Date	End Date	Room Potential	Revenue Potential	Frequency
42 Entertainment	LNR Agreement	SB	03/28/2014	03/26/2014	12/31/2014	40	4,360	Monthly





Weekly Sales Report

Completed Traces – This section will print any completed traces that were completed during the requested dates.

Traces - Completed

Account Name File Code	Trace Date Completed	Sales ID	Contact Name/Notes	Code	Trace Descriptior	Phone #
Abbott Laboratories ABBOTT-T	11/1/2015 **1/15/2016**	KW	Francine Masucci	CUT	AT-Cut Off Date	847-981-8115
Abbott Laboratories ABBOTT-T	11/3/2015 **1/15/2016**	KW	Francine Masucci Sales Call Notes On - 10/07/2015 - For- Abbott Laboratories - My notes for 2nd call on Tues...	PROP	SC-Proposal Due	847-981-8115
Pacific Oaks College PACOAK-G	11/3/2015 **1/15/2016**	KW	Aaron Bryant	PFT	AT-90 Day Follow U	626-529-8063
Abbott Laboratories ABBOTT-T	11/6/2015 **1/15/2016**	KW	Mr James Golden	THK	AT-Thank You	818-590-0756

Open Traces – This section will print any traces that were due to be completed during the requested dates but are still open.

Traces - OPEN

Account Name File Code	Trace Date Completed	Sales ID	Contact Name/Notes	Code	Trace Descriptior	Phone #
American Financial Concepts CETERA-G	11/8/2015	KW	Sandra Sales Call Notes On - 12/11/2014 - For- American Financial Concepts - Tasia, Colin, Joanne, Sandra and Carmen attended client appreciation holiday party. Their annual advisor retreat will be held on 1/7/15.		SC-	626-795-8896
Southern California Edison SCE-T	11/11/2015	KW	Ms. Cindy Luu Sales Call Notes On - 12/11/2014 - For- Southern California Edison - Diane Duran and Cindy Luu attended client appreciation party. Thanked them the business.		SC-	

Weekly Sales Report

Action Plans – This section will Sales Action Plan projects that have a target date during the report period.

Action Plans

Action / Action Notes	Goal / Goal Notes	Cost Segment	Target Date Completed	Sales ID
Brand Marketing Program Participation Contact local colleges for graduation ceremony bookings	Rebook and increase graduation ceremony group bookings for this year.	0.00 GSMF	03/07/2014	ZG
Contact previous groups on the books Maintain relatoinships with existing clients by rebooking their groups for this year and next year.	To increase group bookings for the future.	0.00 GSMF	03/12/2014	ZG
Edge Training Register for Edge training classes	The end result from the training will help me to become a better Sales Manager.	0.00 GSMF	03/31/2014	ZG

Weekly Sales Report

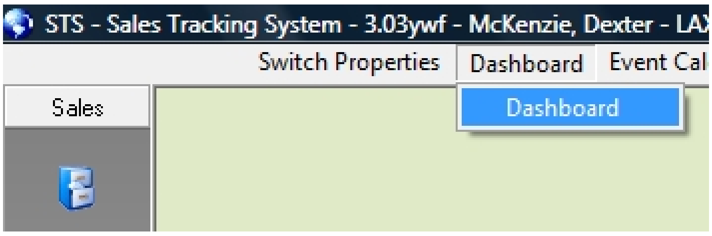
Next 2 Week Agenda

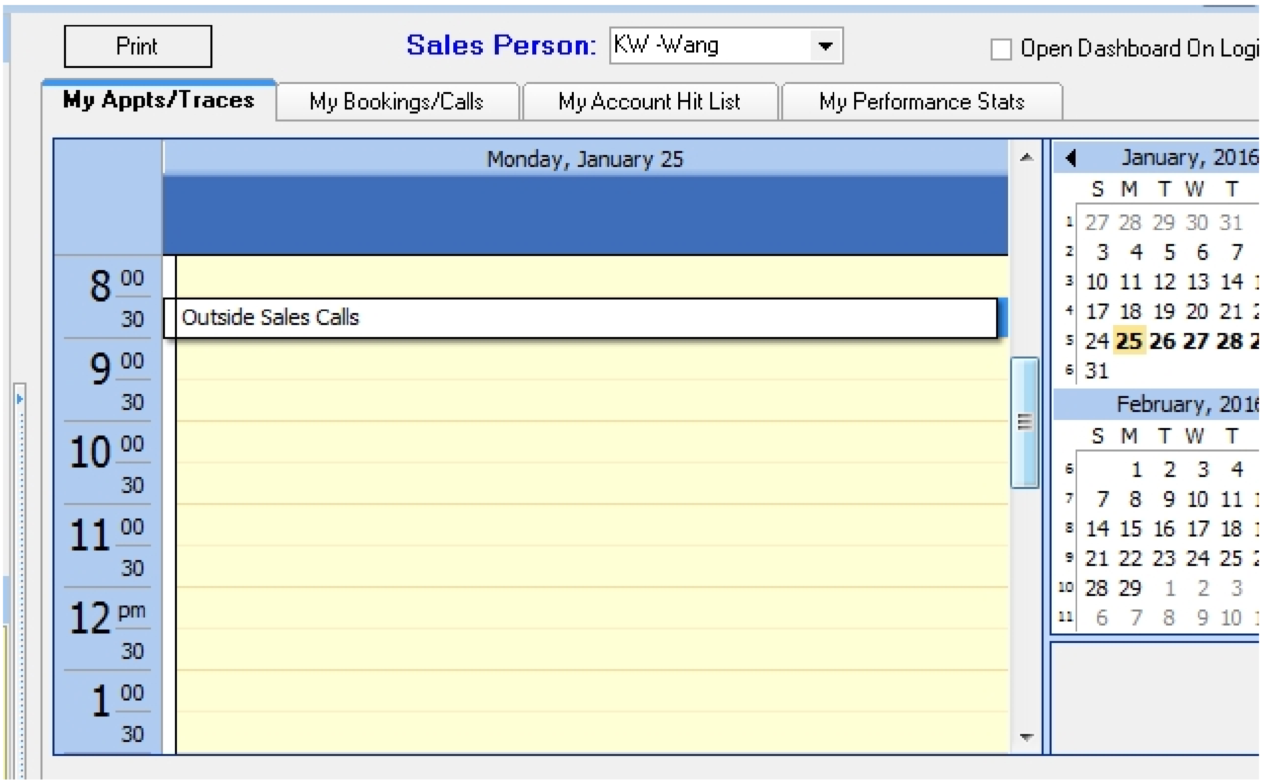
The final section of the Weekly Sales Report will print the appointments found for the next 2 weeks. This section will try to print all appointments found for each day. In many cases there is not enough room to print all of the appointments if a user has entered many appointments for a given day. Even if you do not use the Appointments screen in STS to track your hourly appointments it is recommended you enter at least 1 entry each day describing your planned activities for the day. That information will print in this section and can become an effective communication tool.

Below are the steps for entering entries on the Appointments screen.

1. From the main menu click Dashboard.
2. Choose the date from the calendar you would like to enter data for.
3. Double click in the yellow section to the right of the desired time. And entry should appear stating “Added Item”.
4. Type your text and press the Tab key.
5. You can use the calendar to choose a different date if desired and repeat steps 5 and 6.

Once again, it is recommended to enter your general daily activities (e.g. “Outside Calls”, “In Office Telemarketing”) comments in an **earlier time** for that day to ensure it appears in the last section of the Weekly Sales Report.





Schedule For Next 2 Weeks

Sun	-	01/24/2016	
Mon	-	01/25/2016	Outside Sales Calls
Tue	-	01/26/2016	Trade show - Chicago
Wed	-	01/27/2016	Trade Show - Chicago
Thu	-	01/28/2016	Prospecting - Fairfax Business Park
Fri	-	01/29/2016	Office - Telemarketing Calls
Sat	-	01/30/2016	
Sun	-	01/31/2016	
Mon	-	02/01/2016	
Tue	-	02/02/2016	
Wed	-	02/03/2016	
Thu	-	02/04/2016	
Fri	-	02/05/2016	
Sat	-	02/06/2016	