Dining Reservations Module

KB Article #9910

About Dining Reservations

The Dining Reservations module allows a club to manage Dining Reservations, track sales statistical information with the integrated modules and more!

Based on your Facilities, Meal Periods and Party Size, you can assign an expected turn rate for each table, affording you the ability to automatically schedule your reservations at expected intervals.

Once the members arrive at your dining facility, the system allows for various reservation statuses to be assigned, including “Checked In”, “Seated” or “Closed”. In addition, the system gives you the ability to have a chit automatically created in your Point Of Sale, and assigned to the appropriate server, once your guests have been seated.

Module Integration

The Jonas Encore Dining Reservations module seamlessly integrates with the Jonas Encore suite of software modules including:

- Accounts Receivable
- Inventory
- General Ledger
- Point of Sale
- ClubHouse Online

Module Components

The following briefly outlines the three distinct parts within the Dining Reservations module:

Tasks – Perform tasks relating to Dining Reservations: Create, view (by time, layout, table and block), search, block and squeeze reservations; use booking screen filters, create client preferences.

Setups – Set up essential reservation components: Dining Tables, Meal Periods, Dining Messages, Occasions, Reservation Source, Dining Settings, Table Attributes, Table Type, Turn Rates, Virtual Tables

Reports – Run canned reports: Report on Cancellations, Client Utilization, Reservation bookings, Reservation Change Logs, Turn Rates. Create custom reports using My Reports.

Features and Benefits

- Provides an excellent way to keep track of dining reservations and reducing the time it would require cashing out booked services.
- Simple to follow processes and a graphical interface “visual book” that is easily configurable to meet your needs.
- Synchronized with the Jonas Encore POS module , creating a seamless process of booking a reservation, checking-in and cashing-out a client.
- Provides a higher level of service to your members, while reserving full control for only the appropriate personnel, such as, the host or maitre d’hôtel.
- Simply assign a table number for easy recognition by your most or maître d’hotel, and then add specific attributes for each table. These can include Fireplace Seating, a view of the 18th green, or other unique features of your dining facilities.
- Make reservations on behalf of your Members, or allow them to make their own reservations via your ClubHouse Online website.
- Automatically rotate Meal Period by day of week, or range of dates/seasons to accommodate all of your club’s dining scenarios.
- Make the booking process much quicker by setting up a Turn Rate for each Meal Period as well as the most common Party Sizes in that period.

- Create tentative table reservations and fully assign them at a later time.
- Manage client preferences to serve them according to their specific demands, such as their preferred seating, favorite food, etc.
- Book multi-table reservations by setting up Virtual Tables.

If you require a printable version of this module, search the Jonas Support site's Knowledge Base for a PDF version.

Reservations

The Dining Reservations program allows the user to record member and guest dining reservations. It has been designed to allow booking for single or multiple guests simultaneously under the same reservation.

The "Visual" Booking screen lets you display reservations by four different modes:

- **Time:** lists time, table, table number, client name, etc. in grid format
- **Layout:** view as floor plan with table images (the tables will display color-codes as defined in Settings > Colors tab).
- **Table:** lists tables with time columns
- **Block:** only used to create blocks on the calendar

See this topic for help on setting up Facility Layouts.

The filters available on the booking screen allow for reservations to be created and manipulated quickly. You can simply select the preferred date, dining area, meal period, party size, table attributes and booking status. The system will then return all available tables which will be color coded to specify whether they meet all, some, or none of the specified attributes. The reservation can then be finalized and the system can send an e-mail confirmation for the newly made reservation.

Tip: Use the Preference Setup section to save your preferred set of filters. This helps in saving time by simply selecting the preferred filter, the rest of the fields are auto-populated.

Using the Squeeze button on the toolbar, you can squeeze a reservation to create a custom booking outside of the available times based on turn rates. This allows you to overbook your tables. The table availability restrictions will be ignored when this button is active.

The Information section provides an overview of the selected day's reservations. It contains the Statistics tab, which displays reservation statistics for the selected Meal Period, reservation notes and thresholds (for help on setting up thresholds, see this topic). It also contains the Messages tab, which displays any pre-configured Dining Messages; and the Events for the Day, which displays any events booked via the Event Management module.

Tip: You can define which Information section tab should be displayed first by using the Default Information to Display: field (Dining Settings > General tab > section).

Once you click the New button, the Reservation Details screen appears where you can create and process a reservation.

Reservation Details Screen

The toolbar of the screen contain the option to save the booking, which immediately generate a booking number. Other options include buttons that update reservation statuses; these are Check In, Uncheck In, Seat, Cancel, No Show, and Close Reservation.

The General tab allows for entering basic information about the reservation. The fields within the General Info tab are auto-populated based on the Visual Booking screen filters. The Clients (Members/Guests), Resources and Tables are assigned in this tab. You can also define which table attributes are preferred and not preferred by the booked clients.

The Client Info & Preferences tab lets you edit existing client information, create new client records on the fly, and enter notes discussing client preferences, such as seating, smoking/non-smoking, food, etc.

The Client Reservations tab displays reservation details such as booking number, date, start/end time, party size, etc.

The Log tab allows for viewing Reservation Log.

The Reminders tab allows for sending reservation reminders. Reminders must be pre-configured using the Settings program > Notifications tab > Reminders sub-tab. See this topic for sending a reminder immediately.

Related Topics:

- Setting up Dining Reservations
- Take a Reservation
- Create a Tentative Table Reservation

How do I take a Reservation?

Before beginning, ensure you have the Dining Reservations module set up and in place (see this topic if not).

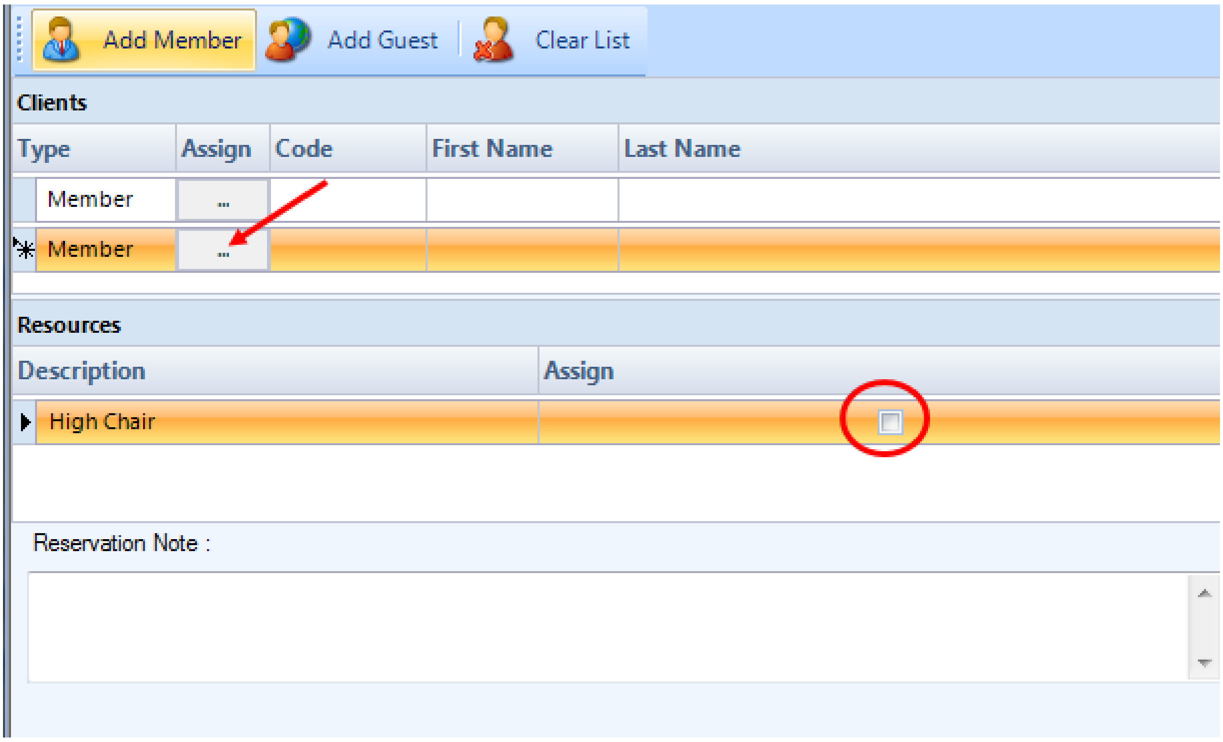
1. Go to Dining Reservations > Tasks > Reservations.
2. In the Calendar section, identify the reservation date.
3. Optionally, use a pre-configured filter in the Preference Setup section. The filters will help auto-populate general details of the reservation. You can also use apply these filters manually if you do not have a preference setup in place.
   Note: You can always change these selections later in the Reservation Details screen.

   For more help, see this topic on setting up a preference filter. If you wish to apply filters manually, you can follow steps 2 through 8 of the same topic.

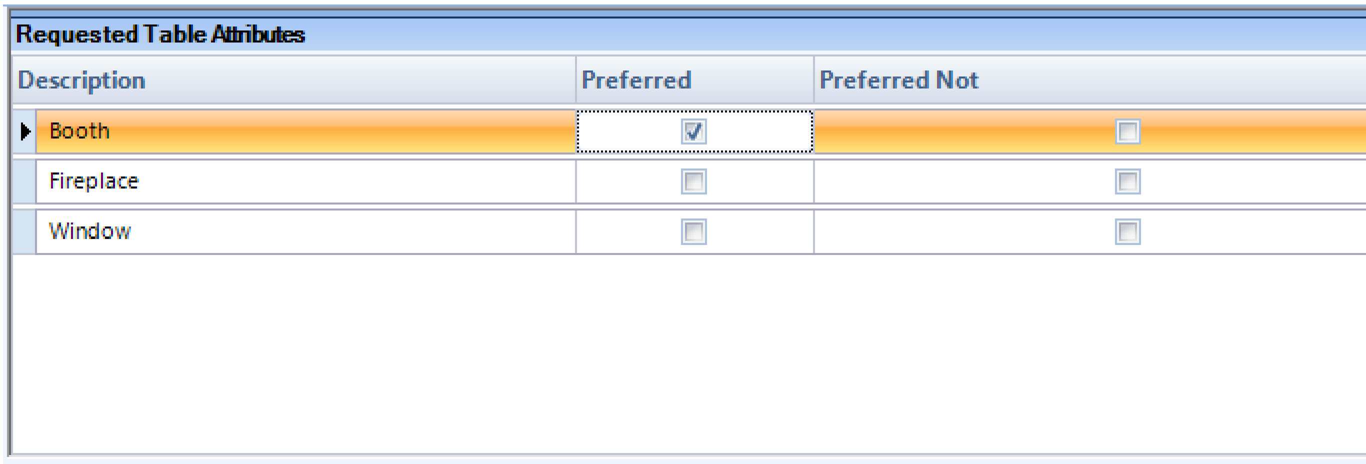
4. At this point you can start the reservation immediately by clicking the New button. You can also select the table and desired time slot prior to starting the reservation by using the Calendar section > View By: field. Your next move depends on the selected view:

- **Time:** Double-click on table/time combination.
- **Layout:** Click on the desired table to open a time grid, then click on the desired time. Note that the tables will be color-coded based on the colors set in Settings > Colors tab. If you do not have a Facility Layout designed already, see this topic for help on doing so.
- **Table:** Double-click on the cell that corresponds to the table and desired time slot.
- **Block:** This view is only used to create block times on the calendar (see this topic for more help on this).

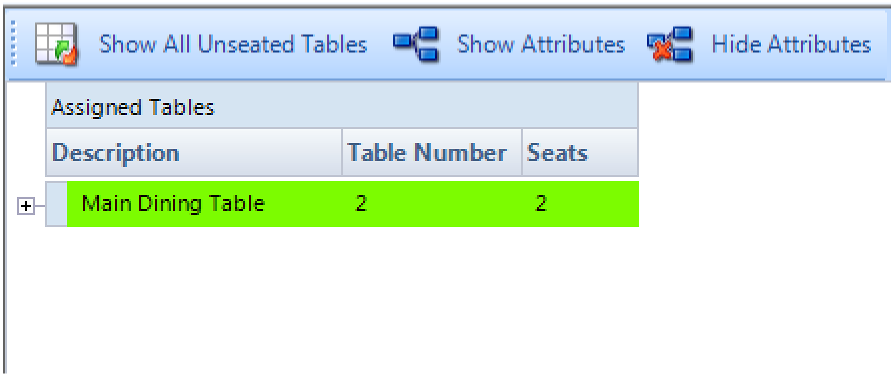
5. The Reservation Details screen opens. The General tab > General Info section will have its fields auto-populated based on the filters, but you can still make changes.
6. If the reservation is being set up for a special Occasion, select it from the list. The Reservation Source can also be selected at this point. This will allow your club to track how most of the reservations are being made.
   Tip: You can make the selection of either or both of these fields mandatory using the Require Reservation Occasion: and Require Reservation Source: fields (Dining Settings > General).
7. If applicable, identify the User creating/editing this reservation.
   Tip: To enable this field, select the Allow Users to Select User Creating/Updating the Reservation: field (Dining Settings > General).
8. Select the clients (Members or Guests) for the reservation. If there will be multiple clients coming for the reservation, you can select the Add Member button and assign them as well. Although it's not necessary to identify each Member, this will be particularly useful when Client Dining Preferences are used.
9. Select any Resources required (if applicable).
10. Optionally, enter a reservation note.



11. Select the Table Attributes requested by the clients (e.g. booth, fireplace, window, etc.) or what they don't want (the Preferred Not column). This will filter the table selection in the next step.

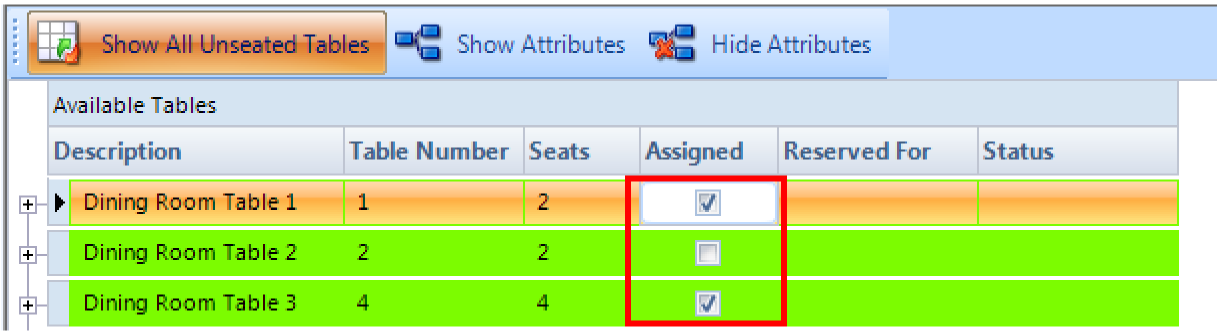


12. Select the Table (Note that if you have chosen the table prior to entering the reservation screen, the table is already isolated for selection. To choose from the whole list of tables, select the Show All Unseated Tables button, then use the Assigned column to select the table(s) to book).



If you would like to switch the table, clear the Assigned: field from the table that is currently selected, then select the Assigned: field for the table you would like to switch to.

Similarly, if you would like to assign two tables to this reservation, click on the Assigned: field for the second table.
Note: At this point you may need to modify the End Time for the reservation. Turn Rates will not be used when making reservations for multiple tables.



Note: Available Tables section is also accessible via POS using the POS Change Table # button (see this topic for help on adding a button to your POS menu).

The tables will be color-coded according to the requested Table Attributes. Green lines meet all the requirements, yellow partially meets the criteria and red meets no requirements.

Note: If a Virtual Table is booked, an additional column displaying its Component Tables will appear. See this topic for help on setting up Virtual Tables.

13. Select the Save & Close (or Copy) button. The reservation number will then popup; click OK to proceed. At this moment, the reservation status is marked as Reserved. For more help on updating a reservation status, see this topic.

Once a reservation is seated, the system may prompt you to print and/or open a POS chit. This is pre-configured in Settings > General > Chit Options.

The Reminders will be sent based on the configurations in Settings > Notifications > Reminders. See this topic if you wish to send reminders immediately.

If at any time you need to edit a reservation and its details, double-click on the reservation from any of the calendar views and the Reservation Details screen will populate.

Additional Features

- Use the Client Info & Preferences tab to set up a new client on the fly, edit the selected client's information, and view notes on their preferences (see this topic for help on how to enter these notes).
- Select the Client Reservations tab to view other outstanding reservations.
- Use the Log tab to view all actions related to the booking (creation, modifications, deletion, etc.).

How do I create Block times?

1. Go to Dining Reservations > Tasks > Reservations .
2. In the Calendar section, select "Block" in the View By: field. Blocks can also be done by Table.
3. Identify the date using the Calendar (the default is today's date).
4. Click on the column grids of the desired Facility . Use your mouse device to select and drag the desired time slots you wish to block.
5. Click the Block  button on the toolbar.
6. The Block Details screen opens. The Facility and time are auto-populated, but you can make changes here.
7. Enter a description for the block and any notes required. The preview will appear on the bottom of the screen.
8. Optionally, specify a color for the block and its text.
9. You can add in a recurrence pattern if the block occurs multiple times. Use the Recurrence button  to do so. Based on the specified settings, the block will appear over the multiple dates identified.
10. Click this  button to confirm creating the block.

To delete a block:

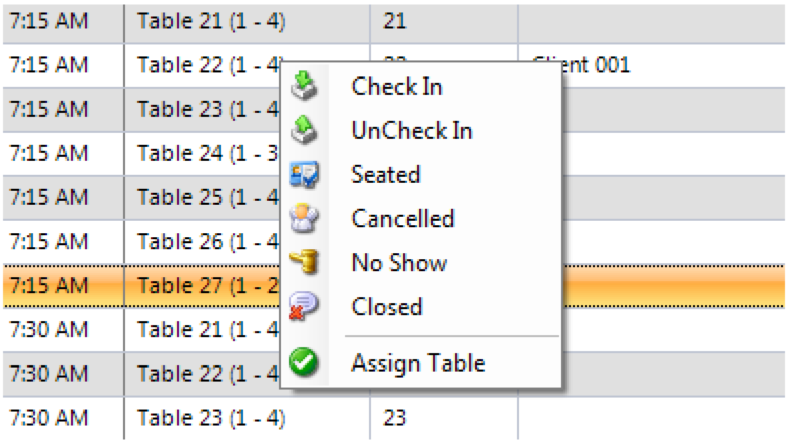
1. Double click on the block on the reservations screen.
2. The Block Details screen opens.
3. Click this  button to delete the block (or multiple blocks within a recurrence pattern) .

How do I assign Meal Periods to a Sales Area?

1. Go to System Administration > System Setups > Sales Areas and select a Sales Area. **Note:** The Sales Area must be associated with the appropriate dining Facility.
2. On the Point of Sale tab, select the This Sales Area can be used for POS sales: field.
3. On the General tab, select the Meal Periods Setting button. The Meal Period Schedule screen appears.
4. On the toolbar area, select the Add Date Range button. A new line is added in the Active Ranges section. Use this to define one or more date ranges during which this Meal Period will be assigned to this Sales Area. For example, your club may have different timings for serving meals that may vary based on seasons or occasions, therefore you may use separate lines to assign separate Meal Period timings to the Sales Area.
5. Identify the Meal Period using the Select Meal Period: field.
6. Using the column grids for each day of the week, identify the active time range (**Tip:** Drag and drop to select).
7. Use the Assign Meal Period button to confirm the selection.
8. To finalize the process, use the Close button and on the Sales Area screen, click the Save button.

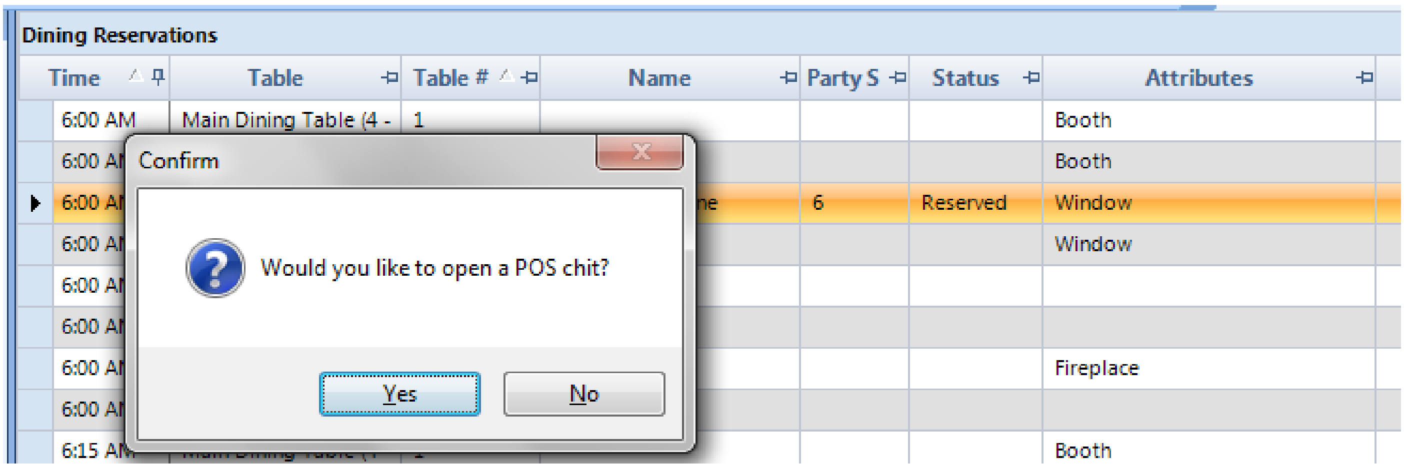
How do I update Reservation Statuses?

1. Go to Dining Reservations > Tasks > Reservations .
2. On the reservations screen, right-click a booking and choose desired action.
   Tip: Alternatively, you can double-click a reservation and use the status buttons on the Reservation Details screen.



- **Checked In:** Use the Check In button once the clients have checked in with the host(ess). This allows for tracking purposes and reporting filters. Use the **Uncheck In** button to undo this status.

- **Seated:** Use the Seat button to have the table seated and a seating chit print (if configured in Settings > Chit Options). Depending on Dining Settings, a prompt will ask whether to open a point of sale chit.



  Selecting Yes will open a chit under the primary member of the reservation. Then, a server can access this chit via the POS screen and begin adding items to the chit.

- **Cancelled/No Show:** Select Cancelled or No Show where the reservation is cancelled, or if the client does not show up (for reporting purposes).
  Tip: Use the Cancellation program to report on cancelled reservations.

- **Closed:** Once the reservation has been completed and the chit is closed in POS, the status of the reservation will automatically be changed to closed. You can also use the Close Reservation button and close the reservation prematurely. For help on closing a POS chit, see this topic.

How do I send Dining reminders?

Reminder e-mails are sent based on the settings you define in the Settings program (Notifications tab > Reminders sub-tab). However, if you wish to send a reminder e-mail immediately, follow these instructions:

1. Go to Dining Reservations > Tasks > Reservations.
2. Access the reservation by using the Search button on the toolbar.
3. On the Reservation Details screen, go to the Reminders tab.
4. In the Reminder Emails section, use the button in the Send Now column to send the reminder e-mail immediately.

How do I create a Tentative Table reservation?

A reservation can be tentatively assigned to a table and assigned fully later. The Allow Tentative Table Assignments: field must be selected in Settings > General to enable this feature. Users that don't have the rights to assign Tables to Reservations will also create Tentative bookings.

The assigned table section in the reservation details screen will now have a column that will mark the table as tentative.

1. Go to Dining Reservations > Tasks > Reservations .
2. Select a table from the main booking screen and double click.
3. Once in the reservation details screen click on the Show All Tables button.
4. Click on the tentative flag for the table.
5. Fill out any other pertinent information such as member name, resources etc.
6. Save the reservation.
7. The reservation will now show up on the main reservation screen marked as 'Tentative'. This will allow a user to log in and quickly determine which reservations need to be assigned.

To Change a Table from Tentative to Assigned:

1. Assuming the User has rights to assign tables, go to Dining Reservations > Tasks > Reservations .
2. Right-click on the tentative table booking and select Assign Table from the menu. The table will no longer be marked Tentative.
3. Save the reservation.

How do I create Dining Thresholds?

For additional dining statistics, you can set up Thresholds to give percentage values of covers and reservations on the Statistics tab of the Dining Reservations screen.

1. Go to System Administration > System Setups > Sales Areas and select a Sales Area.
   Note: The Sales Area must be associated to the appropriate Dining Facility.
2. On the Point of Sale tab, select the This Sales Area can be used for POS sales: field.
3. On the General tab, click on the Meal Periods Setting button. The Meal Period Schedule screen appears.
4. In the Dining : Thresholds section, set the duration of the threshold using the From Time and To Time columns.
5. Set the maximum number of covers.

Dining : Thresholds		
From Time	To Time	Maximum Covers
05:00 PM	08:00 PM	
08:00 PM	11:45 PM	
*		

6. Close the screen.
7. On the Sales Area screen, click Save to finalize changes.

Sample View of Threshold Statistics

Thresholds Statistics	Covers	Reservations
07:00 AM - 12:00 PM	10 / 20 50 %	10 / 20 50 %

How do I enter Dining Client Preference Notes?

1. Go to Accounts Receivable > Setups > Members > Other > Preferences > Dining Preferences.
2. Use the following sections to enter the respective notes:

- Seating Preferences
- Entree Preferences
- Cocktail Preferences
- Dessert Preferences
- Appetizer Preferences
- Other Preferences/Allergies (Cigars/Coffee/Liquor)
- Smoking Preferences

3. Click Save to confirm making changes.

Dining Tables

Use this program to create specific tables for reservations. These tables are linked to a specific Facility and a Table Type.

You can optionally override all of the settings from the Table Type.

The Table Attributes tab allows for selecting attributes that should apply to a table.

Examples could be "GR1" (for Grill Room 1), "DR1" (for Dining Room 2), etc.

Meal Periods

A Meal Period, such as Breakfast, Lunch or Dinner, is a period of time your Facility will be open. Hours of operation as well as Turn Rates will be driven by Meal Periods. Meal period descriptions can appear on member statements if selected in the Sales Area (using the Statement Description Format: field). You can override the default entry screen template assigned to the sales area by using the Entry Screen Template: field on the General tab.

Use the Courses tab to change the available Courses used in the meal period and assign a default to be used.

Dining Messages

Use this program to set up dining messages that should pop-up while taking reservations during a specified date and time range.

Use the Message tab to enter the desired message. You can also modify fonts and styles of a message.

If required, you can restrict a message to specific Facilities or Meal Periods.

Occasions

Use this program to set up specific occasions a dining reservation will be assigned to — such as a birthday or an anniversary. This will allow wait staff to prepare in advance for any special requirements. The For Web: field assigns occasions to Dining Reservations made by way of ClubHouse Online e3.

See this topic for setting up occasion codes.

Reservation Sources

Use this program to set up the sources of dining reservations, e.g., Online, Phone, Email, In-Person. These sources allow clubs to track the reservations for reporting purposes, such as within the Dining Reservation report where the sources are used as filters.

Dining Settings

Use this program to define various settings used within the module.

General Tab

Reservation Details Options

The Time Interval: field sets the number of available reservation slots on the Reservations screen. Intervals are fixed to 15 and 30 minutes.

If you select the Display Reservation Number: field, a message box will pop up after each reservation to display the reservation number.

If you select the Track Reservation Log: field, all changes to a reservation will be logged. The log will be available within the Booking Details screen as well as in the Reservations Log Report.

You can use the Allow Tentative Table Assignments: field so that a table can be tentatively assigned when creating a reservation. See this topic for help on creating a tentative table reservation.

Selecting the Allow Users to Select User Creating/Updating the Reservation: field allows for identifying the User at the time of creating or editing a reservation.

The Require Reservation Occasion: field makes the selection of Occasions mandatory at the time of taking a reservation. Likewise, the Require Reservation Source makes selecting a Reservation Source mandatory.

Threshold Restrictions Options

The Threshold Restrictions: field lets you define whether to restrict reservation thresholds only to the start time, or to expected duration of a reservation. See this topic for help on setting up thresholds.

The Meal Period Enforcement: field allows you to control how reservations can be booked within a Meal Period. Your options are "All Reservations Must Begin and End within a Meal Period" and "All Reservations Must Begin within a Meal Period". See this topic for help on assigning Meal Periods to a Sales Area.

Chit Options

The Print Seating Chit: field determines if a seating chit should be printed when the reservation is seated. The choices are "Never," "Always," and "Ask".

The Open POS Chit: field determines if a POS chit will be opened for the reservation when it is seated. The choices are "Never," "Always," and "Ask". The chit will be accessible via Point of Sale > Tasks > Start New Chit > My Chits or All Chits > Open Chits (see this topic for help on using the My Chits/All Chits screens).

The Ask for Server When Creating Chit: field determines if you would like a prompt to assign a POS chit to a server when a chit is opened for a reservation. If you decide to select this field, you can also restrict server selection to specific Users.

Reservation View Options

Using the First Day of Week: field, you can set what your club considers the first day of the week (the default choice is Monday).

The Default Information to Display: field dictates which tab is displayed first on the

Reservations screen > Information section.

The Reservations are generally one per meal period: field applies to Layout View only. If this field is selected, the Layout View will display a reserved table as "alternatively available" throughout its Meal Period.

Virtual Tables

Use this section to enable using Virtual Tables. See this topic for help on setting them up.

Members/Guests Tab

Gives you the option to update member/guests in the Jonas Encore system.

In the Members/Guests sub-tab, you can allow updates to Member/Guest information currently on file. By setting this, you can edit the information from members/guests collected while taking new reservations.

You can also define whether you would like the system to allow members and/or guests to be created on the fly while taking a reservation.

Default values for Club Status and Membership/Guest Type are used when allowing the creation of new members/guests.

Colors Tab

The Colors tab let you alter the reservation status colors when viewing the reservation booking screen. **Note:** These changes will only affect new reservations from the time of the change. Previously booked reservations will not be affected.

You can optionally alter these colors. To restore the default colors, use the Reset button.

Confirmations Tab

The Confirmations tab allows the user to define when a confirmation letter should be e-mailed or printed. Separate settings can be defined for New Reservations, Edited Reservations and Cancelled reservations.

Club House Online Tab

The Club House Online tab will enable synchronization between Jonas Encore system and Club House Online e3 (CHO). The Synchronize CHO Data button will send all existing reservations as well as any Jonas setups to CHO.

Email Settings Tab

Use this tab to define the SMTP Settings and enter basic e-mail details of the sender; including the From Email Address:, Sender's Name:, Carbon Copy Email Addresses:, and Blind Carbon Copy Email Addresses: fields. The format of the e-mail can be in either "PDF," "HTML" or "Text."

These details will override the Global Settings so that the Dining Reservation e-mails will follow these settings instead.

You can also send a test e-mail to check how the defined settings will work.

Table Attributes

Table Attributes are characteristics of Tables that could be requested for a reservation. For instance, a Member could call in with a request for a table by the fireplace. Other attributes could include a Booth or a Window Seat. While taking a reservation, there is a section where you can input any requested attributes.

The setup includes a Description (max. 40 characters) and an Active flag.

Table Type

Use this program to define the types of Tables and seating available in the club.

General Tab

Each Table Type must contain a description (max. 40 characters).

The Table Type will define the default Turn Rate that will be associated with all the Tables in this group. Table Types will also define the number of seats and the minimum/maximum covers that can be at a Table.

Table Layout Tab

This tab allows for creating a graphical representation of each Table Type. This will be used when creating Facility Layouts for the Dining Room. To create a Table Layout for the Table Type, click the Edit Table Layout Properties button.

The size of the table can be adjusted by dragging the Table Width and Table Height sliders.

To add chairs to the table, use the buttons to add or remove a chair from each side of the table. The Chair Width slider will determine the size of the chair.

The Chair Offset slider will determine how close the chair will be displayed next to the table.

The right side of the screen shows a list of parameters that can be changed to affect how the table and chairs are displayed. For example, the color, texture, and image.

Tip: Click any parameter to view its description (this appears in the lower right section of the screen).

Turn Rates

A turn rate is the amount of time between seating guests at a table and vacating those guests so that a new party can be seated at that same table. Basically, it is the expected amount of time it takes guests to order, eat and leave. Turn Rates drive the table availability shown on the Reservation Booking screen.

A turn rate needs to be created for every possible scenario/combination of party size (4 people vs. 10 people) and Meal Period (breakfast vs. dinner).

Turn rates are assigned to a Table Type and can be overridden on an individual Table.

Tip: It's important to set up a Turn Rate for each Meal Period as well as the most common Party Sizes in that period. This will make the booking process much quicker.

Virtual Tables

Use this program to create fictional tables that represent a combination of actual tables. Virtual Tables can be reserved both within Jonas Encore and online via Club House Online (CHO).

In some cases, you will have reservation with a party size that doesn't fit on any of your tables. By setting up Virtual Tables, multiple tables can be assigned to the same reservation to create a larger table. When a Virtual Table is booked, all of its physical component tables are booked as well.

Like physical tables, Virtual Tables require Table Type, Facility, Default Turn Rate and Table Number must all be specified. The main difference is the presence of the‵Component Tables tab, which is used to specify the physical tables that will be combined to represent the Virtual Table.

Virtual Tables are displayed differently in the views available within the Dining Reservations program:

Time View

In the Time View, Virtual Tables are displayed once a specific number of party size is defined in the Filters section. If the Party Size is set to "All", Virtual Tables will not display.

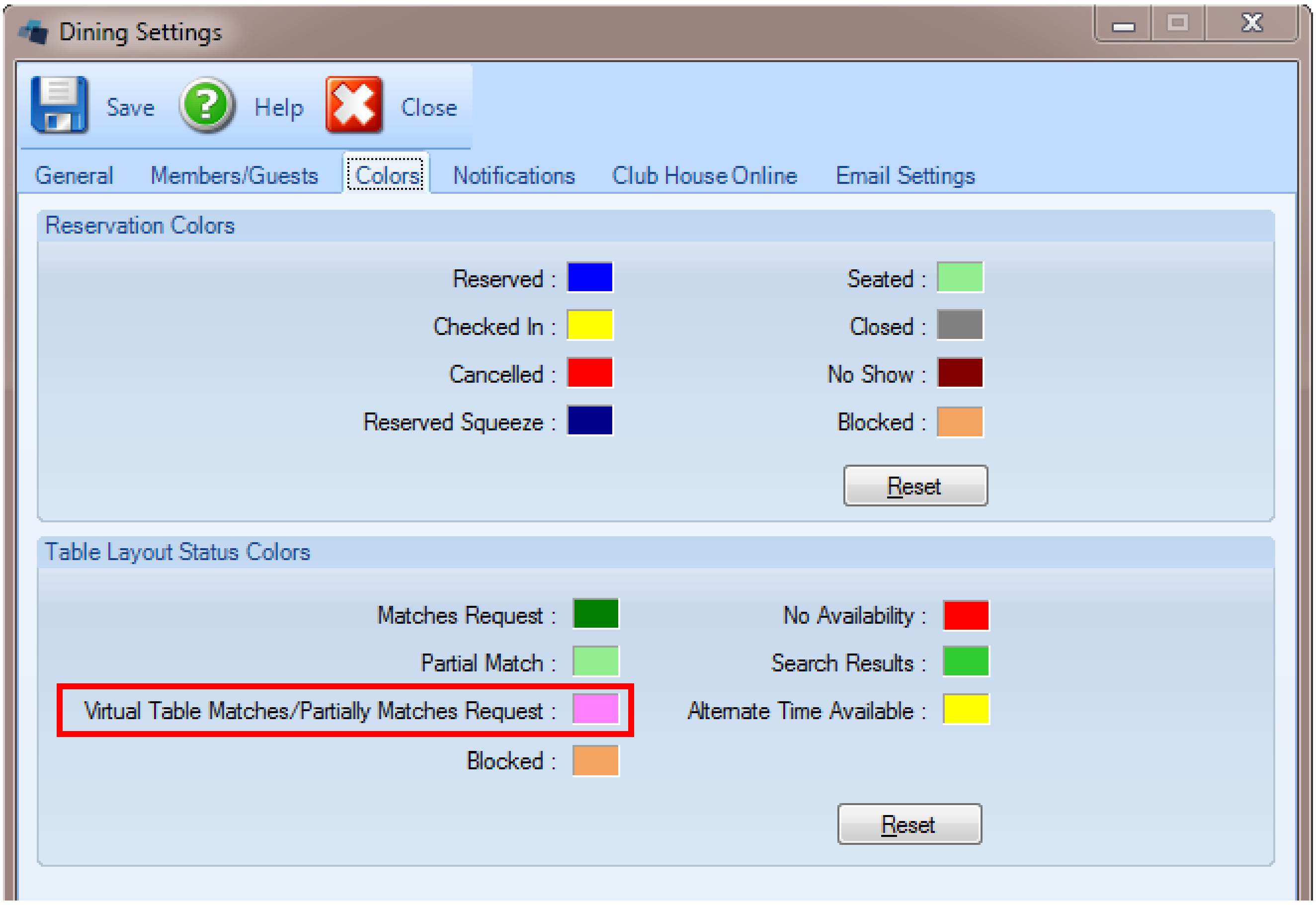
Moreover, the Virtual Table must have the capacity to accommodate the guests and all associated component tables must be available for the entire duration of the reservation. This is to ensure that physical tables are always booked before a Virtual Table is booked.

Table View

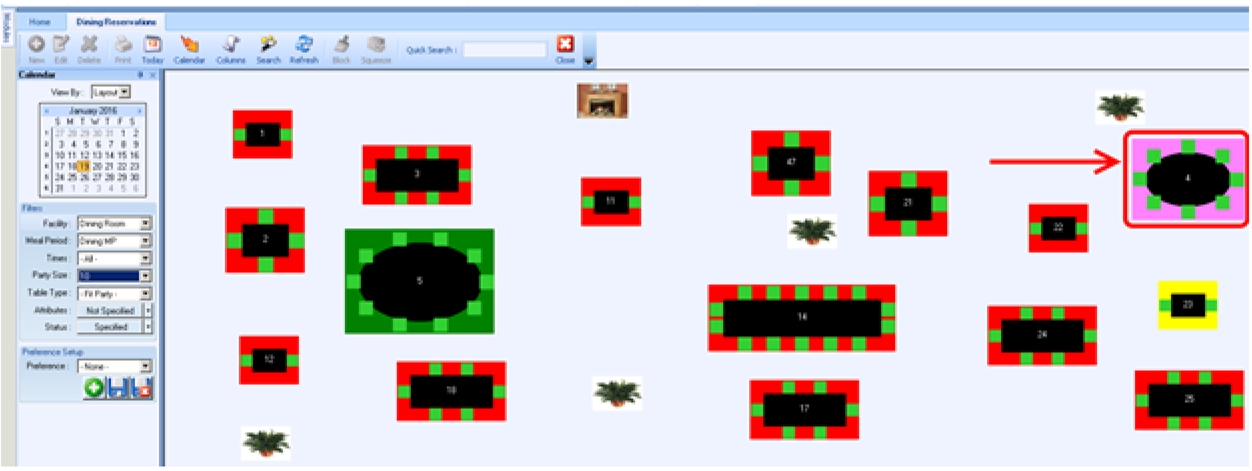
Likewise in the Table View, Virtual Tables appear once a party size is specified and can be accommodated. The availability of a Virtual Table's component tables and will determine the Virtual Table's availability at a various times. The reservation can take place only when all associated component tables are available.

Layout View

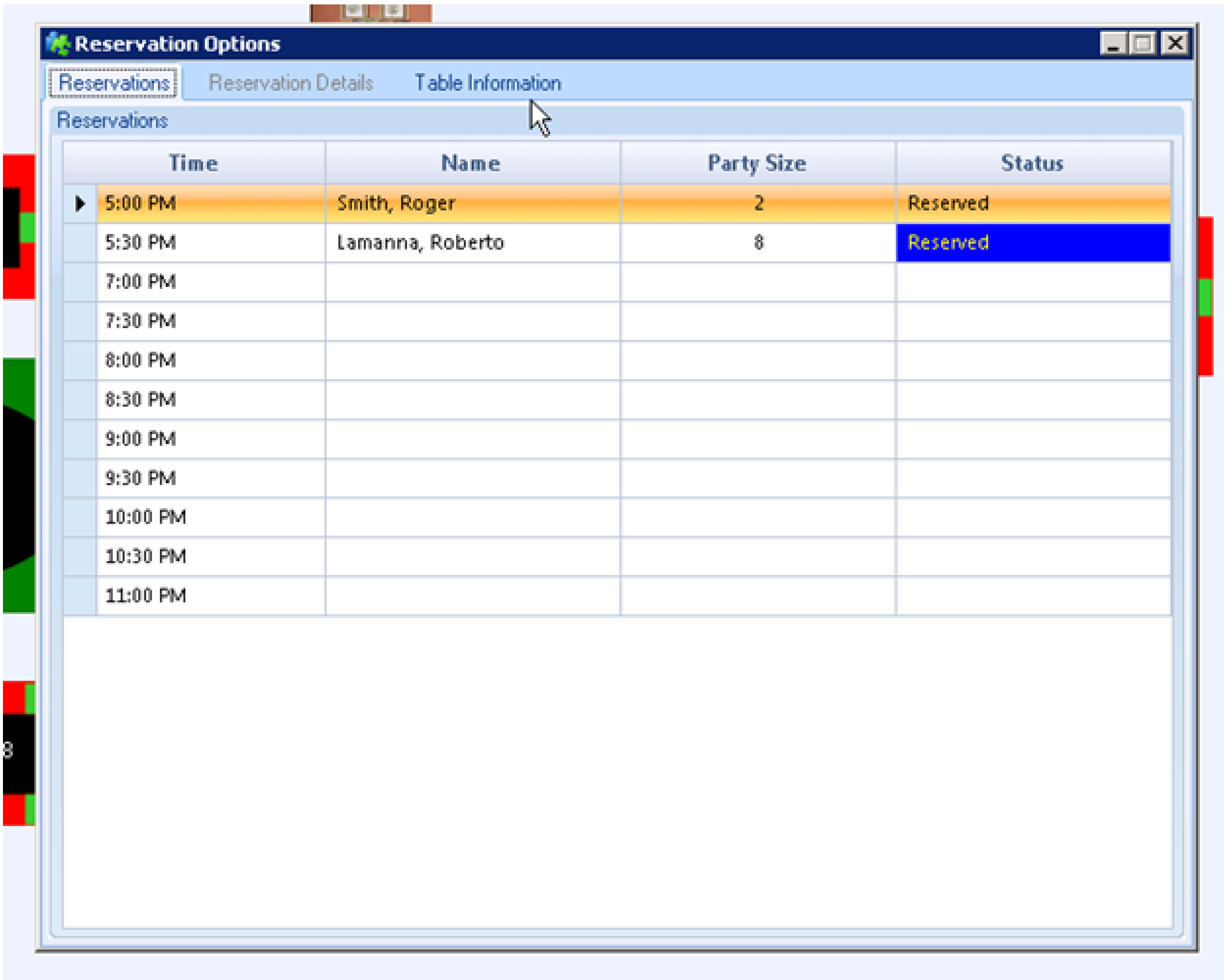
Virtual Tables are not specifically displayed in Layout View, but component tables of a Virtual Table are identified by the highlight color specified in Settings > Colors > Table Layout Status Colors.



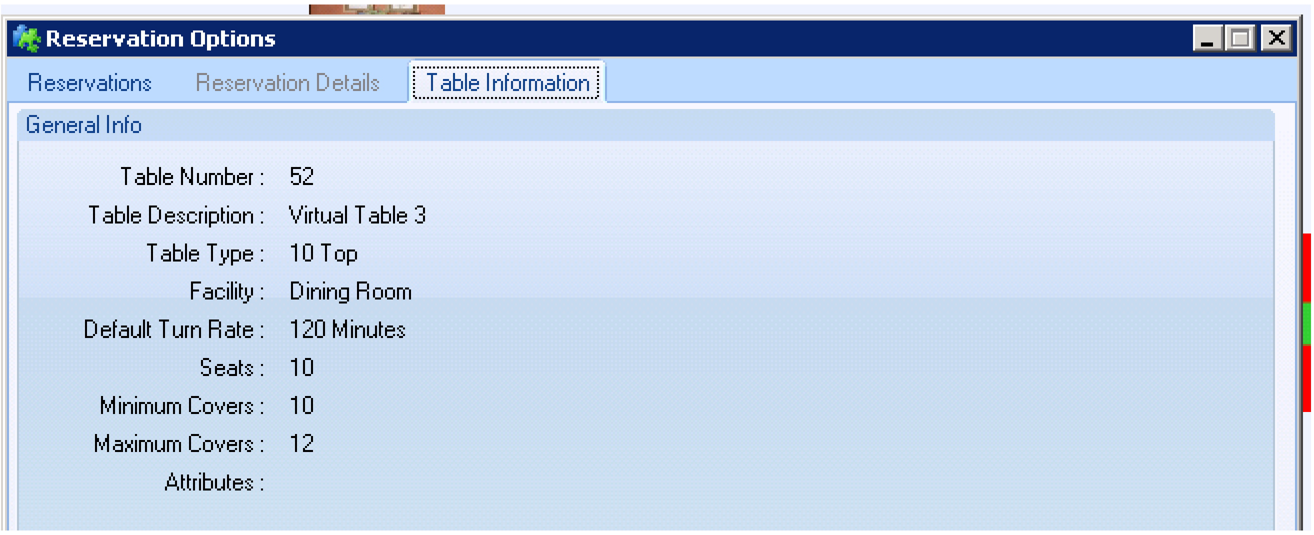
Only one table will be used to represent the Virtual Table (since tables can be components of multiple Virtual Tables) and it will only be highlighted in the color specified for Virtual Tables if it cannot accommodate the specified party size on its own. Each Virtual Table will be represented by the lowest numbered component/physical table that is not already representing a different Virtual Table.



If you click on a Table from the Layout View, the Reservation Options screen will reflect the Virtual Table with respect to all of the tabs: Reservations, Reservation Details and Table Information. Reservations will display all reservations against the all of the component tables.



The Reservation Details tab will display the details of the Reservation selected on the Reservations tab. The Table Information tab will display the characteristics of the Virtual Table.

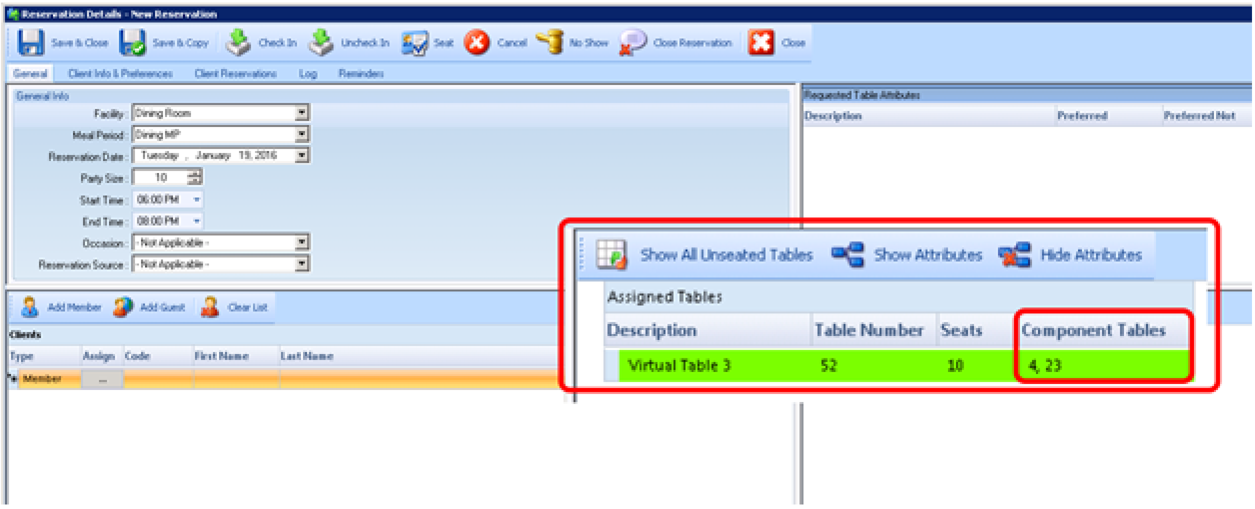


Block View

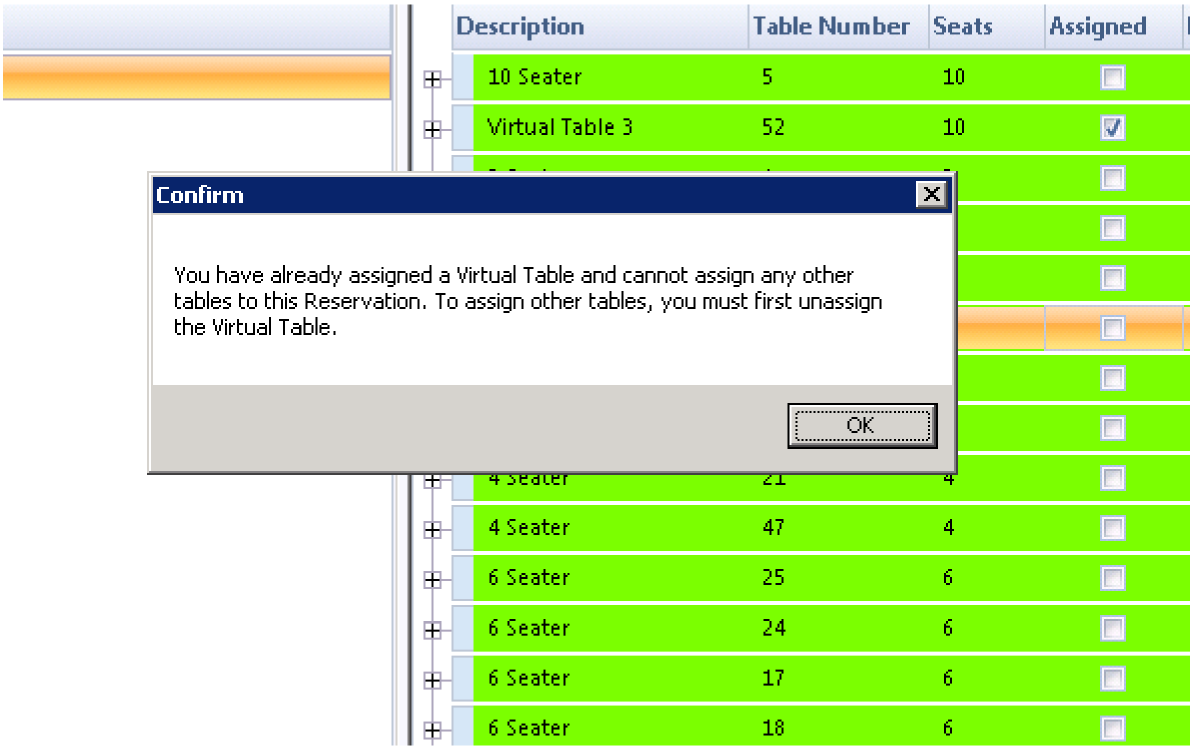
Virtual Tables have no impact in the Block View as this view is only used to set up blocks (see this topic for help on doing so).

Booking Details Screen

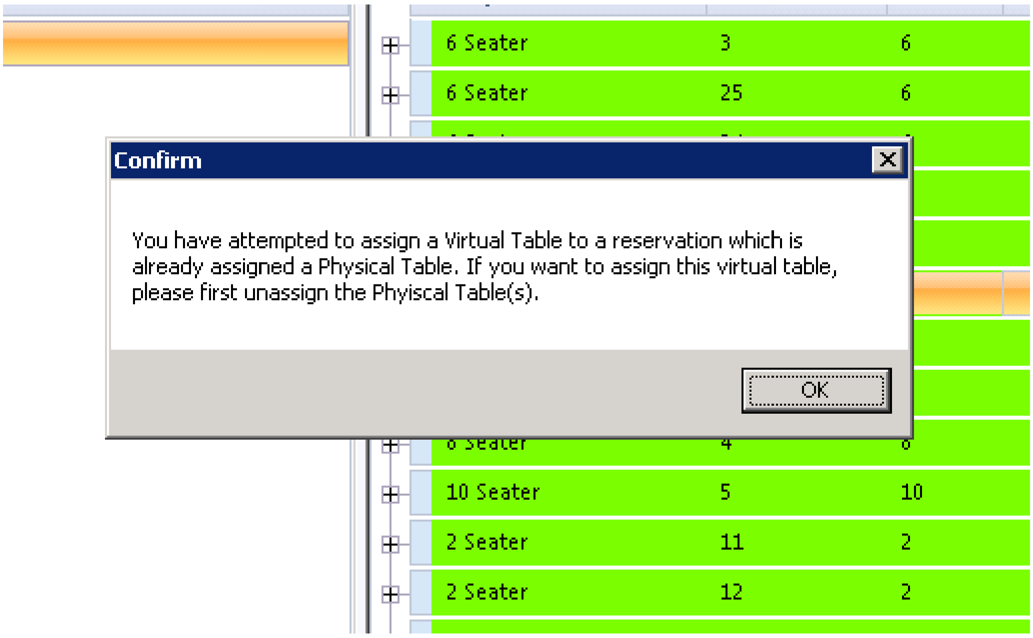
In this screen, the columns under the Assigned Tables section will display the features of a Virtual Table. An additional column of Component Table will display the associated physical tables.



If a Virtual Table is assigned to a reservation and you click on the Show All Unseated Tables button, you will be unable to assign other tables.



If a physical table is assigned and you click the Show All Unseated Tables button, you will be unable to assign Virtual Tables.



More help: See this topic for help on setting up Virtual Tables.

How do I set up Virtual Tables?

Before beginning, ensure that you enable Virtual Tables by accessing Dining Settings> General > Virtual Tables and selecting the Allow Virtual Tables: field.

1. Go to Dining Reservations > Setups > Virtual Tables and click New.
2. In the General tab, enter a description for the Virtual Table (max. 40 characters).
3. Select the Table Type associated to this table. In some cases, where the Virtual Table represents a table larger than any physical table in the club's Dining Facilities, it is advisable that a new Table Type is created.
4. Select the Facility where it belongs.
5. Using the Default Turn Rate: field, you can define whether to use the same default Turn Rate as the table type, or a different one for this table.
6. Assign a unique number to the table.
7. To make the table available for reservations, ensure that it is marked as active.
8. Optionally you can override the settings originally defined in the table type setup. These include seats, minimum and maximum covers.
9. On the Table Attributes tab, select the attributes that apply to this table using the Eligible column.
10. On the Component Tables tab, specify the physical Dining Tables that will be combined to represent this Virtual Table.

Once a Virtual Table is created and marked as active, it becomes available for use within the associated Facility.

How do I set up Dining Facilities?

1. Go to the System Administration > Activity Setups > Facilities.
2. Select the New button, or select an existing record.
3. If you are creating a new facility, begin with the General tab. For more help, see this topic for a detailed discussion on setting up a Facility.
4. Proceed to the Dining Reservations tab.
5. Select the This Facility can be reserved for Dining Reservations: field to make this facility eligible for Dining Reservations.
6. Optionally, select the default Sales Area and Facility Layout in the Dining Reservation section.
7. Optionally, you can override Sales Area Meal Periods settings in the Meal Periods section.

How do I set up Dining Resources?

1. Go to the System Administration > Activity Setups > Resources .
2. Click the New button, or select an existing record.
3. Follow the initial steps of setting up a new resource (see this topic for help on doing so). Examples for dining resources could be booster seats, high chairs, support seats, etc.
4. Go to the Dining Reservations tab, select the This Resource can be reserved for Dining Reservations: field.
5. Optionally, establish which Facilities are eligible for this resource.

How do I set up Reservation Sources?

1. Go to Dining Reservations > Setups > Reservation Sources .
2. Enter the description (max. 35 characters). E.g., Online, Phone, Email, In-Person, etc.
3. To enable this source, ensure that it is marked as active.
4. Optionally, select the Web: field to assign this source to reservations made online.

How do I set up Occasions?

1. Go to Dining Reservations > Setups > Occasions .
2. Enter the description (max. 35 characters). E.g., Anniversary, Birthday, Christmas, New Year, etc.
3. To make this occasion functional, ensure that it is marked as active.
4. Optionally, you can assign this occasion to the Dining Reservations made via ClubHouse Online e3. To do this, select the For Web: field.

How do I set up Table Types?

1. Go to Dining Reservations > Setups > Table Type.
2. Click the New button, or select an existing record to edit.

General Tab

1. Enter a description (max. 40 characters). Examples could be 4-Top Square, 2-Top Round, 8-Top Round, 4-Top Round, etc.

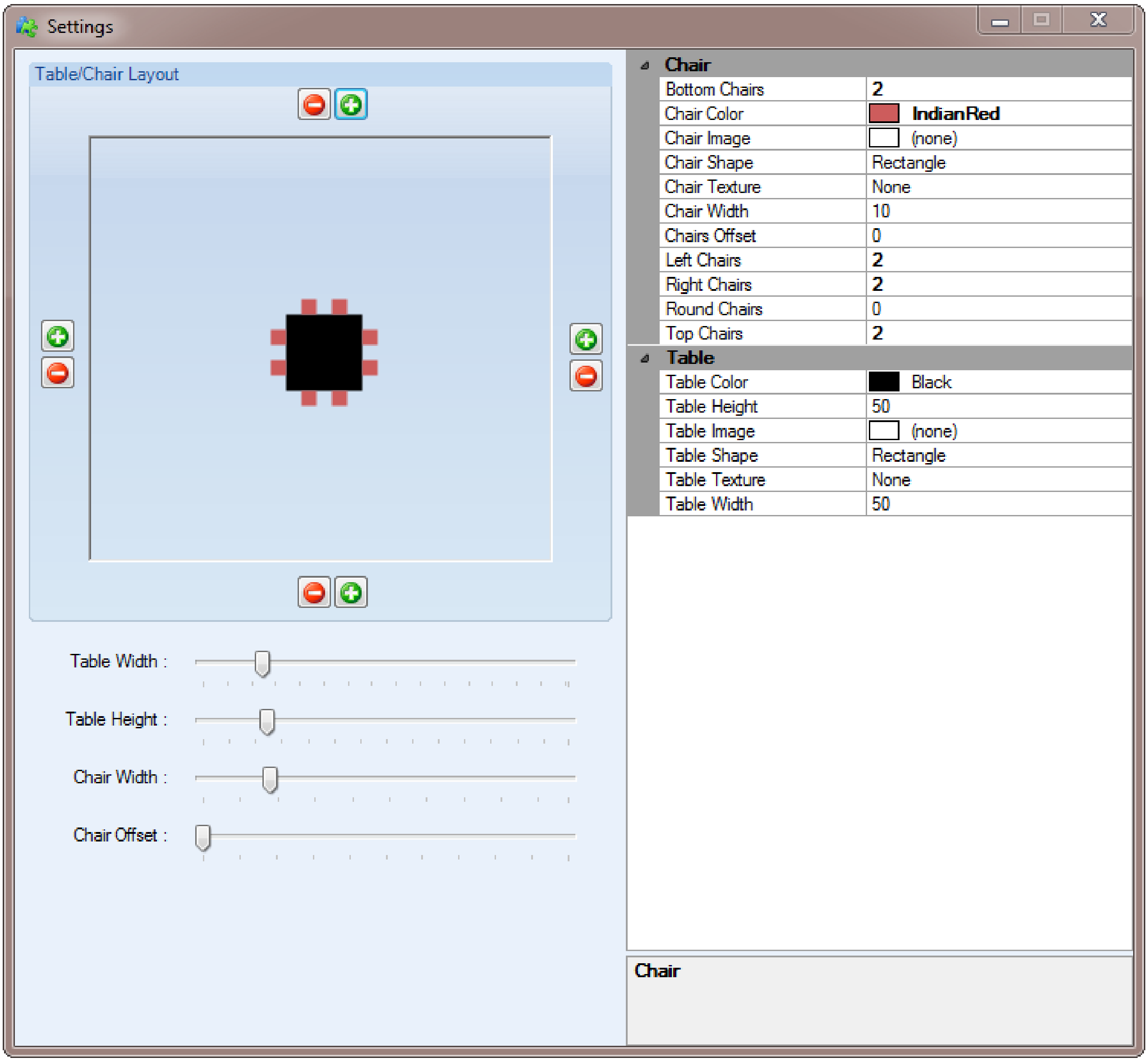
   Note that table types are simply the categories of tables, their description should be generic. Description such as "Grill Room Table" are covered under Tables — not table types.

2. Ensure that the table type is marked as active.
3. Select the default Turn Rate for the table type.
4. Identify the number of seats that are available for tables of this type.
5. Select the minimum and maximum number of covers (guests) that can be seated at these tables.

Table Layout Tab

This tab will allow you to create a graphical representation of each Table Type created. This will be used when creating Facility Layouts for the Dining Room.

1. To create a Table Layout for the Table Type, click on the Edit Table Layout Properties button and the following screen will be displayed:



2. The size of the table can be adjusted by dragging the Table Width and Table Height sliders.
3. To add chairs to the table, use the plus/minus icon buttons to add or remove a chair from each side of the table. The Chair Width slider will determine the size of the chair. The Chair Offset slider will determine how close the chair will be displayed next to the table.
4. The right side of the screen shows a list of parameters that can be changed on how the table and chairs are displayed. For example, the color, texture, and image.
   Note: By selecting a parameter to the right, a description of how it's used will be displayed in the lower right corner.

How do I set up Dining Messages?

1. Go to Dining Reservations > Setups > Messages.
2. On the General tab, enter the subject.
3. The message must be marked as active to appear while taking reservations.
4. Define the date and time range. The date fields default to today's date.
5. Go to the Messages tab to enter the desired message. You can also modify fonts and styles of a message.
6. To optionally restrict the message to specific Facilities, go to the Facilities tab. Select the Restrict to the Following Facilities: field, then select the eligible facilities.
7. To optionally restrict the message to specific Meal Periods, go to the Meal Periods tab. Select the Restrict to the Following Meal Periods: field, then select the eligible meal periods.

How do I set up Table Attributes?

1. Go to Dining Reservations > Setups > Table Attributes .
2. Enter a description (max. 35 characters). These could be the specifics of any tables. E.g., by the window, by the fireplace, booth, water view, a view of the 18th green, or other unique features of your dining facilities.
3. Mark it active to finalize.

How do I set up Turn Rates?

Before you begin, note that a turn rate needs to be created for every possible scenario/combination of party size (4 people vs. 10 people) and meal period (breakfast vs. dinner).

Example #1: A party of two during breakfast may have a turn rate of 30 minutes, whereas a party of four people for breakfast may have a turn rate of 45 minutes (since there are more people).

Example #2: A party of four during dinner may have a turn rate of 75 minutes (a much longer turn rate than the same number of people eating at breakfast since dinner tends to be a longer engagement).

1. Go to Dining Reservations > Setups > Turn Rates.
2. In the Turn Rate section, enter a custom description (max. 30 characters).
3. Ensure that the setup is marked as active.
4. In the Turn Rate Detail section, assign the Meal Period.
5. Identify the minimum and maximum party sizes to which the Turn Rate Time applies.
6. Set an estimated turn rate time. The minimum time is 15 minutes and the maximum is 360 minutes.
7. Establish as many Turn Rate Times as necessary to cover all Meal Period and Party Size combinations.

How do I set up Dining Tables?

1. Go to Dining Reservations > Setups > Dining Tables.
2. On the General tab, enter a description for the table. Examples could be "GR1" (for Grill Room 1), "DR1" (for Dining Room 2), etc.
3. Select the Table Type associated to this table.
4. Select the appropriate Facility.
5. Using the Default Turn Rate: field, you can define whether to use the same default Turn Rate as the table type, or a different one for this table.
6. Give this table a number.
7. To make the table available for reservations, ensure that it is marked as active.
8. Optionally you can override Table Type settings with respect to Seats as well as Minimum and Maximum Covers.
9. Go to the Table Attributes tab. Here you can select which attributes apply to this table by selecting the corresponding Eligible column fields.

How do I set up Meal Periods?

1. Go to Dining Reservations > Setups > Meal Periods and click New.
2. On the General tab, enter a description (max. 40 characters). Examples could be Breakfast, Supper, Lunch, Dinner, Brunch, etc.
3. Optionally, you can make changes in the statement description which is auto-populated while entering the original description.
4. The meal period must be marked active to ensure its availability for reservations.
5. In the POS section, you can define whether to use Sales Area's default entry Screen Template, or you can choose a different one from the available options.
6. Go to the Courses tab to select the applicable Courses for the meal period. **Tip:** Use the Up and Down arrow keys to set the display order of courses.

How do I set up Preference Filters?

1. Go to Dining Reservations > Tasks > Reservations .
2. In the Filters section, select the Facility the reservation will be located in.
3. Select the Meal Period .
4. Identify the time slot using the Times: field.
5. Select the Party Size. The default selection is "All".
6. Select the Table Type . The default selection is "Fit Party", which refers to the table types with the capacity to fit the defined party size.
7. Optionally, specify any Table Attributes . The default is "Not Specified".
8. Optionally, use the Status: field to display tables by the selected reservation statuses. This filter works for the Time View only.
9. Use this  button to give the preference filter a name. Then, click Save & Close.
10. To make changes, you can modify any of the filter fields, then click this  button.

    Tip: Click this  button to delete the selected filter.

How do I set up Dining Reservations for the first time?

Follow the browse sequence (the small arrows in the top right corner), starting with this topic, to perform all the steps required to set up Dining Reservations .

Example of the browse icons:

Overview of Steps

1. Set up Dining Facilities
2. Set up Dining Resources and their Groupings
3. Set up Meal Periods
4. Set up Turn Rates
5. Set up Table Attributes
7. Set up Table Types
8. Set up Dining Tables
9. Adjust Dining Settings
10. Assign Meal Periods to the Dining Sales Area
11. Design Facility Layouts
12. Set up Virtual Tables
13. Set up Occasions

Additional Options

- Set up Reservation Sources
- Set up Reservation Messages
- Create Thresholds
- Enter Client Preference Notes

Proceed with taking Reservations under the Dining Reservations Tasks.

Cancellation

Use this program to report on cancelled reservations.

The Cancellation Report will list all the cancellations for a specific time period. The Report will include the time the reservation was cancelled, as well as the lead time in hours.

The report can be filtered by Facility as well as by Meal Period.

Toolbar Options

Use the Generate button to create your report.

Alternatively, use the Generate on New Page button to publish the report on another page. This helps in comparing the outcome of a report using different sets of parameters.

You can optionally save the report format to launch it later using the saved parameters.

For added screen space, use the Hide Parameters or Full Screen buttons to expand your view of the report.

Printers can be selected within the generated report.

Client Utilization

The Client Utilization report will show a listing of all the reservations a Member/Guest has made during a specific time period. This will also show the total number of covers as well as the total value spent for that Member/Guest.

The report can be filtered by Facility as well as by Meal Period. The Reservation Status can be used to filter out reservations you would not like included in the count, such as Cancelled or No Show reservations.

Toolbar Options

Use the Generate button to create your report.

Alternatively, use the Generate on New Page button to publish the report on another page. This helps in comparing the outcome of a report using different sets of parameters.

You can optionally save the report format to launch it later using the saved parameters.

For added screen space, use the Hide Parameters or Full Screen buttons to expand your view of the report.

Printers can be selected within the generated report.

Dining Reservation

Use this program to create a comprehensive report on your club's Dining Reservations .

The program contains a wide range of filters allowing for you to customize the report.

The outcome appears in two different formats: Standard Report and Alternate Version. The key difference between the two reports is that the Standard Report displays additional columns for Facility, Meal Period and reservation Status, whereas the Alternative Version displays notes for each reservation. Moreover, the Facilities: and Reservation Status: fields are disabled in the Alternative Version as they are not applicable to this format.

The following screenshot displays the **Standard Version:**

Dining Reservations Report

TT - Trafalgar G&CC Limited Partnership

Facility : - All -
Date From : Apr 11, 2018 **To :** Apr 12, 2018
Reservation Status : All
Reservation Source : - All -

Date	Start Time	End Time	Party Size	Name	Table	Occasion	Res #	Reservation Source	Phone #	Facility
Apr 11	7:30 AM	7:45 AM	1	Client 001	21 (Tentative)		001378	- Not Applicable -		Dining F
Apr 11	8:15 AM	8:45 AM	1	Client 001	21 (Tentative)		001379	- Not Applicable -		Dining F
Apr 11	8:15 AM	8:45 AM	1	Client 001	24 (Tentative)		001380	- Not Applicable -		Dining F
Apr 11	8:15 AM	8:45 AM	1	Client 001	26 (Tentative)		001381	- Not Applicable -		Dining F
Apr 11	8:15 AM	8:45 AM	1	Client 001	22 (Tentative)		001382	- Not Applicable -		Dining F
Apr 11	8:15 AM	8:45 AM	1	Client 001	23 (Tentative)		001383	- Not Applicable -		Dining F
Apr 11	8:15 AM	8:45 AM	1	Client 001	25 (Tentative)		001384	- Not Applicable -		Dining F
Apr 11	8:15 AM	8:45 AM	1	Client 001	27 (Tentative)		001385	- Not Applicable -		Dining F
Apr 11	9:00 AM	9:30 AM	1	Client 001	23 (Tentative)		001394	- Not Applicable -		Dining F
Apr 11	9:00 AM	9:30 AM	1	Client 001	27 (Tentative)		001395	- Not Applicable -		Dining F
Apr 11	9:00 AM	9:30 AM	1	Client 001	21 (Tentative)		001396	- Not Applicable -		Dining F
Apr 11	9:00 AM	9:30 AM	1	Client 001	24 (Tentative)		001397	- Not Applicable -		Dining F
Apr 11	9:00 AM	9:30 AM	1	Client 001	25 (Tentative)		001398	- Not Applicable -		Dining F

This is the **Alternative Version:**

Reservation Status Report

TT - Trafalgar G&CC Limited Partnership

Facility : - All -
Date From : Apr 11, 2018 **To :** Apr 12, 2018
Reservation Source : - All -

Date	Start Time	End Time	Party Size	Name	Table	Occasion	Res #	Reservation Source	Phon
Apr 11	7:30 AM	7:45 AM	1	Client 001	21 (Tentative)		001378	- Not Applicable -	
Apr 11	8:15 AM	8:45 AM	1	Client 001	21 (Tentative)		001379	- Not Applicable -	
Apr 11	8:15 AM	8:45 AM	1	Client 001	24 (Tentative)		001380	- Not Applicable -	
Apr 11	8:15 AM	8:45 AM	1	Client 001	26 (Tentative)		001381	- Not Applicable -	
Apr 11	8:15 AM	8:45 AM	1	Client 001	22 (Tentative)		001382	- Not Applicable -	
Apr 11	8:15 AM	8:45 AM	1	Client 001	23 (Tentative)		001383	- Not Applicable -	
Apr 11	8:15 AM	8:45 AM	1	Client 001	25 (Tentative)		001384	- Not Applicable -	
Apr 11	8:15 AM	8:45 AM	1	Client 001	27 (Tentative)		001385	- Not Applicable -	
Apr 11	9:00 AM	9:30 AM	1	Client 001	23 (Tentative)		001394	- Not Applicable -	
Apr 11	9:00 AM	9:30 AM	1	Client 001	27 (Tentative)		001395	- Not Applicable -	

Optionally, you can include Attributes (along with reservation notes), Resources, Client Preferences in Standard Report. Member Number can be included in both formats.

Toolbar Options

Use the Generate button to create your report.

Alternatively, use the Generate on New Page button to publish the report on another page. This helps in comparing the outcome of a report using different sets of parameters.

You can optionally save the report format to launch it later using the saved parameters.

For added screen space, use the Hide Parameters or Full Screen buttons to expand your view of the report.

Printers can be selected within the generated report.

My Reports

Use this program to launch published reports and edit publishing information.

You need to have published at least one report to your user/user group to be able to launch it. The published reports appear on the Reports pane.

The Launch Report button opens the saved report with its defined parameters. Use the Generate button to create your report. For added screen space, use the Hide Parameters button to expand your view of the report. Printers can be selected within the generated report.

Use the Edit Publishing Info button to organize the reports. The Group 1/2/3 Description: fields are used to assign the report a group and/or sub-groups. These are used in the tree view organization scheme of Reports in the left pane of the screen. Use the Report Note: field to add any notes you wish to display in the My Reports screen when this report is selected. All published reports can be grouped according to what is entered (if blank) or selected (if some are already published) in the fields. Use the Remove From My Reports button to remove the saved format from this program and it will no longer be available for publishing and editing.

Reservation Log

The Reservation Log Report generates a detailed log of any changes made to a Reservation .

Note: The Track Booking Log: field must be selected for this feature to be activated. The field is located in Dining Settings > General .

The program allows for publishing a printer-friendly change log, which can also be accessed via Reservations > Reservation Details > Log.

The filters include a date range, reservation number, and the type of action (all, created, updated, and deleted).

Toolbar Options

Use the Generate button to create your report.

Alternatively, use the Generate on New Page button to publish the report on another page. This helps in comparing the outcome of a report using different sets of parameters.

You can optionally save the report format to launch it later using the saved parameters.

For added screen space, use the Hide Parameters or Full Screen buttons to expand your view of the report.

Printers can be selected within the generated report.

Turn Rate

Use this program to report on Turn Rates.

The generated outcome will help you determine if the Turn Rate setups are accurate, or need to be modified. This report will list the Expected Rate as well as the Actual Rate and calculate the difference between them. The Actual Rate will be set once the POS chit has been closed for the reservation.

The Report can be filtered on Facility, as well as by Meal Period. The Reservation Status filter can be used to filter out reservations that have been cancelled or are no shows.

Tip: The Report will be more useful if you use the Reservation Status to only show "Closed" reservations. Once the POS chit is closed the reservation status will automatically be changed to closed, so the report will have accurate data.

Toolbar Options

Use the Generate button to create your report.

Alternatively, use the Generate on New Page button to publish the report on another page. This helps in comparing the outcome of a report using different sets of parameters.

You can optionally save the report format to launch it later using the saved parameters.

For added screen space, use the Hide Parameters or Full Screen buttons to expand your view of the report.

Printers can be selected within the generated report.